

Public Health Agency of Canada
Awareness Campaign Materials
RESOURCE GUIDE

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INTRODUCTION

About This Resource Guide

In collaboration with the Public Health Agency of Canada (PHAC), marketing communications agency Banfield has developed this Resource Guide for community organizations working to address sexually transmitted and blood borne infections. It is intended to equip community organizations with tools that will be helpful in the development and evaluation of awareness materials. The content provided includes:

- Suggestions for process – the steps to be taken to ensure effective materials are developed
- Key success factors and pitfalls in the writing and design of awareness materials
- Guidelines for briefing resources to ensure that the key elements that influence conceptual development – such as target audience, objective of the creative, key message, brand linkage – are understood
- Considerations for French executions – how to ensure a concept is adapted and not just translated
- Evaluative tools and guidelines, that are simple and efficient to use, like a creative checklist
- Recommended approach for managing diverse perspectives and/or situations where large groups are involved in approvals

Context

We live in a challenging environment for all marketers. People are bombarded by huge numbers of marketing messages every day in a vast range of contexts and formats. One research source that includes every possible message permutation (including labels on products on stores and labels on people's clothes) put the range at 3,000 to 12,000 per day¹. Two other studies that narrowed the type of advertising messages down to a much tighter definition, still quote 247 - 600 per day². Either way, that is a great deal for the human brain to process.

Given that bombardment, it is not surprising that audiences will decide in less than a second whether or not to pay attention. In one study, in the first 800 milliseconds, the brain decides whether or not it will continue to watch the marketing message³, while the following 4 to 5 seconds are crucial in retaining a viewer's attention⁴. For display advertising such as print ads, posters, billboards, and online ads, other research studies show that advertisers have only 1-2 seconds to attract the audience's attention. And then advertisers only have 5-10 seconds to communicate their full message⁵. This research confirms that awareness materials must be extremely succinct, direct and clear.

¹ Source: Yankelovich Consumer Research June 2012

² Sources: Consumer Reports and Business Journal Phoenix (U.S) 2010

³ Source: Sands Research Inc., 2010 <http://www.cnn.com/2010/TECH/innovation/10/05/neuro.marketing/>

⁴ Sources: Sands Research Inc., Perception Research Services 2014

⁵ Sources: Perception Research Services 2014, Qualtrics LLC 2014, MediaCom/Guardian Professional 2013

GUIDING PRINCIPLES

In preparing this guide a panel of marketing experts with experience in health, non-profit and community-based communications as well as francophone markets, reviewed materials developed by community organizations addressing sexually transmitted and blood borne infections in Canada. The panel provided written feedback and then met to discuss recurring issues from their analysis. Panel members identified these key issues across all materials:

- Competing and unclear messages
- Too much text and visual clutter
- Ineffective or confusing imagery
- Weak call to action

The panel exchanged their thoughts and ideas on why those issues tend to arise and how to overcome them, and came to the following conclusions:

Less is more

The #1 enemy of effective communication is too much text and too many visual elements, creating a cluttered concept. Organizations have, at most, a few seconds to attract attention and communicate a message, before the audience is distracted. A concept that is comprised of numerous elements cannot be instantly grasped and will not be effective. Almost all concepts reviewed would have significantly benefitted from being edited and/or simplified.

Establish and communicate one key message

Panel members discussed and agreed that organizations need to identify and focus on one key message to ensure that concepts are effective. It is important to note that a “key message” is not just communicated via text, but through effective use of *text plus imagery*. A carefully crafted, simple combination of a few words and an image is the best means of delivering one key message.

The panel understood and acknowledged that those responsible for the materials are often concerned about developing a concept that is complete, i.e. nothing important is left out. It was also acknowledged that organizations are taking into consideration input from many varied stakeholders. But as a result of these concerns and too much input, it seems that the organizations end up with materials that may be complete, but also cluttered and not effective.

Any concept – a poster, postcard or online ad – must serve as a “trailer” or “elevator pitch”, and not as the whole story. It must attract interest and be memorable, and then leave the details to be covered elsewhere – i.e. on web pages or social media properties. The poster can direct the audience through a call to action.

Given the resource limitations that non-profits can be faced with, these organizations must strive to identify the single most important element to get across, and then communicate it boldly, persuasively and simply.

Strive for simple, bold and relevant imagery

Ineffective and confusing imagery are also enemies of an effective key message. Because a key message is best communicated through a combination of text and imagery, the images should be carefully selected to be relevant and supportive of the key message. This will improve both comprehension and memorability. Ideally, the images alone (if text were blurred out) would still give the audience an immediate idea as to the subject matter. Bold and simple imagery also play a key role in grabbing the audience’s attention, which is incredibly important in today’s cluttered media environment. Clichéd images and/or cluttered graphics and visual elements may well be ignored.

Stronger calls to action

A weak call to action is vague and/or easily missed. A strong call to action is aligned with the key message and is clear, specific and prominent. Even if a campaign poster or ad has a primary

objective of “raising awareness”, a strong call to action is still essential. Once made aware of, or touched by a message about an issue, audiences will feel frustrated if they aren’t provided with a clear next step.

Examples of weak calls to action included subtle URLs (on their own or with just “for more information” or “learn more” preceding them) and vague statements such as “join the conversation” or “get involved” followed by a URL. A strong call to action the panel cited was “Get tested” on a series of hepatitis posters – this is a very clear, specific action that was prominent in the lay-out and strategically aligned with the key message about the dangers of hepatitis.

GUIDELINES AND TOOLS

These guidelines and tools will help organizations incorporate best practices in the development and evaluation of awareness materials. The tools were customized in order to be useful and effective with small budgets and tight resources. They are based on key success factors and common pitfalls in the writing and design of awareness materials.

The tools we have provided are:

1. **Recommended process** – a brief summary of the ideal creative development process, based on creative agency best practices. While most community organizations do not have large enough budgets to work with a creative agency, this process can be replicated when working with individual writers and designers, and/or internal creative resources.
2. **A creative brief template** – an essential document that provides focus and ensures that the key elements that influence conceptual development are understood. Creative resources – designers and writers – should be walked through a creative brief, either by phone or in person. The creative brief is also a key evaluation tool when reviewing concepts.
3. **Guidelines for concept development** – our senior creative teams list some key guidelines for concept development based on design and copywriting best practices.
4. **Considerations for French executions** – these basic guidelines aim to ensure a concept is adapted from both a linguistic and cultural perspective, and not just translated.
5. **A creative concept checklist** – an excellent starting point for concept evaluation.
6. **A creative evaluation worksheet** – a useful discussion guide and a tool for collecting feedback from diverse stakeholders.
7. **PPCO (Plusses, Potentials, Concerns, Overcome Concerns)** – A helpful tool for structuring and delivering feedback on creative concepts.

PROCESS

The creative development process is inherently challenging. To ensure creativity is maximized, without sacrificing strategy and effectiveness, creative agencies follow this type of process. Nonetheless, this process can be replicated when working with individual writers and designers, and/or internal creative resources.

1. **Creative brief** – When an agency is involved, an agency strategist or account executive will often write the creative brief for the client. However, when an organization is working directly with an individual writer and designer, the organization will need to write the creative brief. Either way, a documented creative brief is an essential tool. The brief distils key information and insights in order to focus and inspire creative resources. It also serves to evaluate the concepts, once developed.
2. **Idea generation** – For larger campaigns or marketing communication projects, an idea generation session is a good place to start. A diverse group with a variety of perspectives (internal and external) can together generate some “big ideas”. These ideas can then become the basis for specific concept development. Idea generation session rules are:
 - *Defer judgment* – if ideas are judged during brainstorming, creativity is stifled. Ideas that are not feasible or off base can be critiqued and eliminated later but should not be criticized while the idea generation is occurring.
 - *Welcome unusual ideas* – “out-there” ideas that are not feasible can often spark other interesting and original ideas that can be executed, so allow wild and unusual ideas to be expressed.
 - *Build on ideas* – in the same vein, build on and play with ideas to see how they might evolve into other ideas, or more feasible solutions
 - *Strive for quantity* – the more ideas that are generated, the more likely something exciting and new is discovered. Push the team that is brainstorming for more and more.

3. **Concept development** – Creative resources develop concepts based on the brief. Ideas generated in a brainstorm session can be included at the end of the brief, for inspiration.

Ideally, creative resources include both a professional designer and writer. Effective communication of a key message is achieved through *text plus imagery*, so expertise in both areas is extremely helpful.

4. **Concept review** – when concepts are initially shared with the project team, it should ideally be done in person or at least over the phone. Allowing creative resources to present their work is a more collaborative and open approach that is likely to result in a more productive revision process.
5. **Feedback and revisions** – use the tools in this resource guide for gathering feedback and use PPCO (also in this guide) to structure the delivery of feedback. Ideally, feedback is delivered verbally, but then also documented for reference and to avoid misinterpretation.
6. **Concept finalization** – Usually after several rounds of revisions, the final concept is completed. It should be a clear, simple, refined piece of communication that delivers on the creative brief.

CREATIVE BRIEF

A creative brief is an extremely useful tool in several ways:

- When organizations are working with an advisory group - the creative brief can be shared with the group at the beginning of the process to ensure there is a coming understanding, up front, of what concepts will focus on accomplishing.
- For briefing creative resources, e.g. writers and designers. Creative resources should be walked through a creative brief, either by phone or in person.
- For evaluating concepts – the brief is a key reference point for feedback on creative concepts

A good creative brief is brief. A concise brief is extremely helpful to creative resources, e.g. writers and designers, whereas a brief with too much information or repetition of information is less likely to inspire an effective concept.

Creative brief templates vary; they can (and should) be customized to a marketer's needs. Below is a creative brief that we would recommend for community organizations, based on our understanding of the creative development context and process.

Creative Brief Template

<p>Description of the Requirement What does the creative team (writer/designer/art director) need to develop?</p>
<p>About the Organization Briefly describe the organization – its core mission.</p>
<p>Campaign Focus Briefly describe the campaign's focus, theme or key issue and why it has arisen. What challenge or opportunity does it present?</p>
<p>Objective of the Creative Concept What is the purpose of the concept being developed? What should be the outcome of audiences seeing/reading/experiencing the concept?</p>
<p>Target Audience List target audiences and stakeholders that we need to reach, in order of priority. Provide focused audience information that is relevant to the objective of the creative.</p>
<p>Insights What are core or universal truths about the target audience and/or the theme/issue? Insights should be relevant to the objective of the creative, so they can be leveraged in the creative concept to make it resonant.</p>

Key Message What is the one key message the concept (copy + design) needs to deliver?
Supporting/Proof Points Key facts that back up the Key Message – evidence to convince the audience that the key message is true.
Call to Action What specific action do we want the audience to take, after they see the concept.
Tone What tone is appropriate for the concept? What kind of voice should the organization have, given the issue and the audience?
Suggested Elements and Thought-Starters Ideas from brainstorming, available photography (client supplied/royalty free/rights managed), or other elements that are suggested, but not required.
Mandatory Elements/Requirements Elements that must be included, e.g. brand identity guidelines, sponsor logos, legal

GUIDELINES FOR CONCEPT DEVELOPMENT

Overall Design and Development

Design and development should be driven by the strategy that is established in the creative brief. It should be guided by the objective of the concept, the target audience, the key message, the call to action, etc.

In evaluating the design, refer to the creative brief to determine if the concept is, or is not, effectively delivering on the strategic elements in the brief.

Reduce clutter – Simple and thoughtfully crafted lay-outs with less text that include significant amounts of “white space” or clear areas will better succeed in communicating a message. “White space” or clear areas also encourage the eye to flow from one part of the concept to the next.

Overall, the design should be simple and purposeful in order for organizations to demonstrate:

- Relevance
- Experience
- Trustworthiness
- Leadership

The design should reflect the eye’s tendency to move from left to right and from top to bottom, and be based on a thoughtful prioritization of content:

- First priority: key message and call to action
- Second priority: supporting points

Consider the Format/Context – In the development and evaluation of creative concepts, take into account both the format and likely context, e.g.:

- Format – poster, online ad
- Context – wall of a health care facility or community centre, screen of a mobile device

The smaller the space and the more distracting the context, the more it is critical that concepts are clean and concise.

Imagery

Imagery should reflect the organization’s values. As organizations focused on sexually transmitted and blood borne infections, images and illustrations should be:

- Thoughtful
- Impactful
- Motivating
- Current
- Representative

Singular imagery - Use of a singular powerful image generally attracts more attention and interest than multiple images, and is easier for audiences to quickly digest and comprehend.

Image selection - Imagery should feel authentic. Appropriate photography and good quality illustrations should always be used and the following guidelines should be followed:

- Avoid obvious stock photography - images should not appear posed or contrived
- Avoid clichés
- Do not use trite/overused stock illustration – i.e. styles that are used frequently in marketing and communications may be familiar but will not help the concept stand out
- Do not use overly whimsical or cute images or illustrations
- Less is more – be minimal and reduce clutter

Colour palette

Each design should use a coordinated colour palette of 2-4 colours. One colour from the palette should be used as the primary colour. Using fewer colours, in a bold and coordinated fashion will be more effective than a wide range of colours. Too much colour and too many graphic elements will overwhelm and discourage audiences from pausing to take in the key message.

Text

Text should be planned to work in tandem with imagery, and as such, be treated based on importance/priority - higher level text that communicates the one key message should visually have more weight on page through size, colour and font weight, and supporting points less

Again, “white space” and clear areas are important, as they encourage the eye to move from one area of text to the next.

Multiple visual entry points into the text can be created through obvious headers and sub-heads. Also, the use of quotes or pull-quotes from the text can attract interest and encourage reading.

Typography should be clean, simple and readable. Fonts should be chosen primarily for their legibility and clarity, and not to try to add creativity. They generally should be limited to one font family.

Copywriting

In evaluating the quality of the writing in a concept, consider the following guidelines

Writing should be purposeful:

- Objective is clear
- Word choice is precise
- Style is engaging
- Tone is appropriate
- Message is consistent and copy points are prioritized

Edit, edit, edit

A very common problem among those materials reviewed was too much text. Be ruthless and keep text to a minimum – strive to communicate one message. If necessary, “kill your darlings” – i.e. delete phrases that are interesting points or have appealing wording, unless they are essential. Use supporting text elsewhere where it is more appropriate, e.g. on a campaign web page or in social media content, where more detail can be provided.

Accessibility

For both print and web materials, guidelines exist to ensure acceptable accessibility standards are met. The guidelines cover issues such as grid, hierarchy, printing surface, colour and contrast, typography, perceptibility, navigability, etc... Depending on the composition of organizations’ target audiences, it may want to ensure its materials follow accessibility guidelines, such as those recommended by the Government of Canada or on websites such as Web Accessibility Initiative - <http://www.w3.org/WAI/>

GUIDELINES FOR FRENCH AND BILINGUAL CONCEPTS

When developing concepts and copy for an English and French audience, make sure to always consider your translation at an early stage. Testing a concept earlier rather than later will save time in the long run.

For stronger bilingual campaigns, things to avoid in English typically include:

- Phrasing that depends on a certain rhythm or cadence
- Language-specific expressions, turns of phrase
- Words that rhyme

If a concept or copy in English is considered "too strong to pass up" but does not have a direct/comparable French translation, ensure that it can at least be adapted into something different but of equal strength. To do that, you could:

- Go back to the spirit of the idea and/or the visual execution to develop the French version
- Explore new ways to express it in French beyond what was done in English

If the organization's resources do not allow for the services of a trained translator/adaptor, then ensure that more than one native French speaker is consulted to avoid inconsistencies in interpretation.

CREATIVE CONCEPT EVALUATION CHECKLIST

A tool for evaluating concepts during the creative development phase

When initially evaluating a concept, run through the checklist below, and try not to “overthink” each item. Take note of your feedback for items #1 - #4, and then do a more careful evaluation based on the creative brief (#5).

✓	<p>1. What is my initial reaction? It is important to trust your instincts about what instantly appeals to you or not. Note your first reaction and keep it in mind. (However, if you are not personally within the target audience, put a little less weight on your first reaction than on the other checklist items.)</p>
✓	<p>2. Is it “on brand”? Is the creative consistent with the organization’s values?</p>
✓	<p>3. Is it distinctive? Will it break through the clutter in the marketplace? Will it have stopping power given that we have only milliseconds in which to capture attention, or be dismissed?</p>
✓	<p>4. Is it confusing or cluttered? Will the target audience grasp the message in a matter of seconds?</p>
✓	<p>5. Is it “on brief”? Once you have noted your answers to #1 - #4, evaluate the concept vis a vis the creative brief. Does it deliver on key briefing items like “objective of the creative” and “key message”? Is the concept focused or is it trying to do too much? Carefully consider whether the concept will motivate the target audience to take action. Be sure to put yourself in the target audience’s shoes.</p>

CONCEPT EVALUATION WORKSHEET

A tool for managing diverse perspectives and/or situations where large groups are involved in approvals

When gathering feedback from a group or committee, it is critical to establish criteria and provide specific questions as prompts.

Provide this worksheet to evaluators along with the creative brief. Together, the worksheet and creative brief will ensure that all stakeholders are following a consistent approach in evaluating concepts. This will increase efficiency and reduce the subjectivity of feedback.

This worksheet can either be completed and submitted by various evaluators, or used as a discussion guide on conference calls.

Initial Reaction and Stopping Power:

Questions/Prompts:

- What is my initial reaction? First impression? Does it make me want to stop and read more?
- Will it draw our audience in, when they first see it?

Effectiveness of Message:

Message = text + imagery, i.e. the net take-away of the combination of copy and visuals

Questions/Prompts:

- Is there one clear message?
- Do I “get it” quickly? Does the concept draw attention to what is most important?
- Is the message persuasive and memorable?
- Is there anything confusing about the concept? Any mixed messages?

Call to Action – Is It Clear, Specific and Prominent?

Questions/Prompts:

- Is the purpose of the concept clear? Will the audience be clear on what the sponsor wants them to know and do?
- Will it encourage desired action by the audience?
- Is the call to action clear? Does it provide a clear means for taking the desired action?

Tone/Style Appropriate to Audience:

Questions/Prompts:

- If you were the target audience, would you know “this is for me”?
- Is the tone appropriate, relevant and meaningful to the audience it is targeting?
- Has it tapped into the audience’s perspective?
- Is it authentic, or trying too hard?

Clarity and Memorability of Branding:

Questions/Prompts:

- Is it clear who is “talking”? Is the voice of the message clear and credible?
- Is it clear who are the sponsors?
- Am I likely to remember the organization?

Tone/Style Appropriate to Brand and Message:

Questions/Prompts:

- Is the tone or style appropriate to the organization and its values?
- Does it present the organization as a credible and reliable source?
- Is the tone or style appropriate to the message and the purpose of the concept (the subject matter)?
- Is the tone meaningful and believable?

Other Comments:

Questions/Prompts:

- Is this concept “ownable” – does it communicate a specific/unique message or could the audience mistake it for another cause/issue?
- Identify other strengths or effective elements
- Identify other deficits/challenges
- Logos/trademarks/organization and other required elements appear to be treated correctly?

FEEDBACK TOOL - PPCO⁶ (PLUSSES, POTENTIALS, CONCERNS, OVERCOME CONCERNS)

A tool for structuring and articulating feedback on creative concepts

The creative brief, checklist and evaluation worksheet provided above will help mitigate subjectivity when evaluating creative concepts. The next step is communicating the feedback to the creative resources. In general, “creatives” are passionate about their work and often take criticism personally. PPCO – Plusses, Potentials, Concerns, Overcome Concerns – is a good tool for managing that sensitivity and providing constructive criticism that leads to strong and effective creative concepts.

1. Plusses and Potentials

- Start with what is effective about the concept – discuss its strong points in delivering on the creative brief.
- Consider also what potential it has – what may occur if the concept is implemented? What opportunities might this idea open up?

2. Concerns

- Express concerns as specifically as possible. Be sure to explain why there is a concern, e.g., “The target audience may not find it convincing because...” “I am concerned that it won’t motivate our audience to ... because ...”
- Phrase concerns as questions and relate them back to the creative brief, e.g., “How might we put more emphasis on the key message?” “How can we make the call to action more prominent?” “How could we make this stand out more?”

3. Overcoming concerns

- Rather than reject a concept, express concerns and ask the creative team to try to overcome the concerns. (Phrasing concerns as questions naturally encourages this solution-oriented approach.)
- Brainstorm to overcome concerns with the team in order to demonstrate that you are trying to be constructive and not just critical.

⁶ PPCO was originated in the early 1980’s by Diane Foucar-Szocki, Bill Shephard and Roger Firestein. It is a key tool taught by the Creative Education Foundation, Inc. and The International Centre for Studies in Creativity.

CONCLUSION

From working with many non-profit organizations, we understand the unique challenges you face. Resources and budget are always a constraint. Funding is limited and non-profits increasingly need to do more with less.

Community-based organizations also sometimes represent a large number of other organizations and/or are often part of a larger network whose needs and perspectives they need to take into account. Also, organizations need to factor in the input of diverse sponsors, partners, stakeholders and funders.

Furthermore, as mentioned in the introduction, it is a very challenging environment for all marketers and communicators trying to disseminate a message. Audiences are bombarded by marketing communications and make split second decisions as to whether they will acknowledge or dismiss a message.

In developing this resource guide, we have taken into account the non-profit challenge and today's exceedingly cluttered marketing environment, by providing tools and guidelines that are as specific and easily applicable as possible. We hope you find them helpful.