Summary of case study on a page

Owner: [Insert Name]
Company: [Insert Name]
Date: [Insert Date of Case Study Submission]
Related Links: [Company Link | Market Reports | Portfolio of Work]

Opportunity	2-3 bullets to summarize the context (of the business or market), challenge, and/or opportunity.	
Insights	List all the questions that were asked in the exercise. This will help you ensure you are answering all of them. 1. … 2. … 3. … 4. … 5. … 6. … 7. … 8. … 9. … 10. ...	
Business Objective & KPIs	**Business Objective:** ● [One sentence.]	**Business KPIs:** ● [Insert KPIs]
Marketing Objective & KPIs	**Marketing Objective:** ● [One sentence.]	**Marketing KPIs:** ● [Insert KPIs]

Campaign Positioning		
Get [target audience + consumer problem]	**To** [desired response]	**By** [one message/action]

Single-Minded Message
SMM in one line.

MARKETING BRIEF

1. Background + Context

To Include: business, category and cultural context; Why now? How will this initiative help us achieve our brand and/or business ambition? What are the challenges and opportunities? What does the market and category landscape look like?

2. Objectives + KPIs

1. **Total Addressable Market:**
   [Highlight here your calculations for the TAM]

2. **Business Objective:**
   [The business objective should clearly outline what we need to drive for the business.]

3. **Business KPIs:**
   [Define what success looks like from a business perspective & set targets (even if they're hypotheses we're validating)]

4. **Marketing Objective:**
   [The marketing objective should define what this campaign must do to deliver the business objective.]

5. **Marketing KPIs:**
   [Define what success looks like from a marketing perspective & set targets (even if they're hypotheses we're validating)]

6. **Product KPIs:**
   [Define what success looks like from a marketing perspective & set targets (even if they're hypotheses we're validating)]

7. **Sales KPIs:**
   [Define what success looks like from a sales perspective & set targets (even if they're hypotheses we're validating)]

3. Target Audience

Who is the core target consumer we are trying to reach? Is there a primary ("bulls-eye") and secondary target audience?

For a brief to be effective, we must clearly define our target, including their demographics, psychographics, and

insights into their motivations and behaviors. Consider the following information should act as a start:

- Segment name (if applicable)
- Gender
- Household makeup
- Relationship status
- Age
- Suburban or urban
- Users or non-users
- Category users or non-users
- What are their motivations? This framework can be used to help uncover motivations.
- What are their barriers?
- What are their needs?
- What are their behaviors and knowledge around the category? Where/how/when does it fit into their lives?

4. Positioning and Narrative

A. <u>Campaign Positioning</u>

...

B. <u>Narrative</u>

...

Reasons to Believe

1. **...**
2. **...**
3. **...**

C. <u>Product and Feature Positioning</u>

5. Proposed Channels & Deliverables

Proposed Channels
Consult with channels teams to fill in what channels you are considering for this campaign. This should not be a 'final' list, but one that will continue to be evaluated and refined as the creative concept and go-to-market plan come to life.

Paid: [Insert proposed paid channels - tv, OOH, print, radio, podcast, digital, direct mail, etc.]
Owned: [Insert proposed owned channels - CRM, web, social, blog, etc.]
Other: [Insert proposed other channels - partners, events, experiential, etc.]

6. Sales Strategy, Enablement & Training Considerations *(*B2B*)*

These should reflect things that the sales enablement and sales ops must do in the campaign and things that you would like them to consider as they are building out the launch strategy. Also include upsell/cross-sell strategies

Critical Must-Haves (include Legal considerations when necessary)

- [Insert any commitments that MUST be included in creative]

Global Considerations

- [Insert any considerations that should be kept in mind as the creative is developed]

Regional Considerations

- [Insert any considerations that should be kept in mind as the creative is developed]

7. Timeline

Priority	Deliverables	Budget Needs	Timing
A	Foundational Marketing		June/July
P0	Audience insights		
P0	Business insights		
P0	Employee insights		
P0	Positioning and Narrative		
P0	Marketing and Strategy brief		
P0	Illustrations		
P0	Photography		
P1	Campaign wrapper		
P1	Marketing Toolkit		
B	Sales Enablement		June
P0	Sales presentation		
P0	Sales plays		
P0	Onboarding guides		

C	Creative Content		July
P0	Insights eBook		
P0	Insights Infographic		
P1	Blog post		
P1	One pager		
P1	Webinar		
P2	Social media		
D	Press and Media		
P0	Press announcement and newsroom post		
P0	Media briefings		
E	Web		
P0	Landing Page		
P0	Content pages		
P0	Sign-up forms		
F	Email and In-App		
P1	CRM Campaign		
G	Digital Ads		
P0	Search ad templates		
P0	Facebook ad templates		
P0	LinkedIn ad templates		

8. Useful Resources

Market Reports | Presentation | Insert here links to data sources or presentation