



MARGO BERMAN THE COPYWRITER'S TOOLKIT

THE COMPLETE GUIDE TO
STRATEGIC ADVERTISING COPY

 WILEY-BLACKWELL

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I would like to dedicate this book to my parents who gave me the discipline and creative freedom to solve complex problems.



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PREFACE

It doesn't matter whether you're a student, novice, or seasoned professional, this book will hone your copywriting skills. Beginning with strategy and technique, each following chapter focuses on writing for a specific medium: from print, broadcast, and out-of-home through social, interactive, and digital media. Writing examples are shown using a gamut of industry standard formats, which are useful reference points when writing. You'll quickly see how radio scripts differ from TV scripts, how television storyboards are presented, and how print copy is typed up to facilitate typesetting.

You'll discover why thinking from the production end first helps writers create better broadcast copy. Starting with the end result in mind helps you consider which talent to cast and what sound effects or music cuts to include. These conscious choices force you to write for a specific voice and with a completely produced spot in mind.

Other writing areas of discussion will help you avoid other production errors like inaccurate script length, legal issues created by the absence of talent releases, and screen safety problems in television post production. Special callout boxes will make major principles easy to remember and simple to apply.

You may already realize that it's not enough for you to know how to create headlines and slogans or to write strong copy. You must also know how to create gripping messages in every medium, from traditional to emerging. Besides having an understanding of current trends, you should also be creative enough to bend or invent new media vehicles. You should avoid creative stagnation and innovative inertia. With all your mental muscle, you should push your imagination past the status quo. And create new avenues of expression.

In order to this, you must have a solid writing foundation. You need to understand various script formats, creative brief templates, media restrictions, and compositional structures. Then, you need to build on that knowledge and cement it with strategic thinking, analytical insights, audience-relevant messages, and sound writing techniques.

This book will give you an entire toolkit of tips to write in all size spaces, all venues, and all touchpoints. Whether you're creating messages for small print or mobile coupons, packaging, or "gigantormous" billboards, interactive or any other media, you'll be able to apply the principles set forth in this volume and succeed in writing compelling copy.

Great advertising writing isn't just clever; it's convincing. It's persuasive. It's interruptive. It's intrusive. Most of all, it's unforgettable. The ad campaigns that create "talk value" (are talked about over office water coolers) also generate free press and propel the campaign into everyday events and mainstream consciousness.

How do you begin to create these kinds of messages? You start by understanding that every assignment has an objective. An audience it's targeting. An array of media where it encounters that consumer. And a specific strategy to deliver that message.

To help you get started, each chapter is devoted to one aspect of writing. I would recommend you read the first four chapters first, so you have a solid foundation of the basics: targeting your audience, presenting key benefits, creating a brief (chapter 1), selecting a strategy (chapter 2), applying writing techniques (chapter 3), and developing a main message (chapter 4). After that, you can read any chapter in any order (from chapters 5 through 14). That's because the book is modular.

Therefore, each chapter stands on its own. So, if you'd like to read about writing for television, you could read that chapter. Or if you're interested in blogging, you could go to that chapter. Or if you're curious about multilingual or international campaigns, you start with the last chapter. People learn best when they satisfy their curiosity. With that said, you can begin wherever you want. Then, go to whatever interests you most. Here's the order of each medium that's explored.

- Chapter 5: Print (ads, brochures, catalogues)
- Chapter 6: Radio
- Chapter 7: TV
- Chapter 8: Direct mail, mobile and small-space writing
- Chapter 9: Out-of-home and transit
- Chapter 10: Digital dialogue, virtual community, blogging
- Chapter 11: Websites
- Chapter 12: Interactive engagement, social media and viral marketing
- Chapter 13: Integrated campaigns
- Chapter 14: International campaigns

I also recommend familiarizing yourself with the content set in callout boxes. They're designed so you can find what you're looking for. If you want to review the checklists, you can find them listed in the table of contents or the index. If you want to read tips for writing, simply look those up. Or, if you want to check out the info boxes, rules, and so on, go right ahead. You can also scan the book and read the callout quotes. They're little bites of wisdom that are easily digestible.

To best absorb the information in each chapter, allow yourself the necessary time to do the following:

- 1 Read the copy in all the examples.
- 2 See how it relates to the image.

- 3 Look carefully at typography for hierarchy of message. (See what's emphasized by the size, position, and style of the type.)
- 4 Review the terminology lists.
- 5 Visit the listed websites.
- 6 Complete, or at least examine, the exercises.
- 7 Become an active observer. Notice new media everywhere.
- 8 Practice your analytical skills every day, whenever you see advertising messages.
- 9 Be a gracious recipient of criticism. You'll grow faster.
- 10 Read more. Be receptive to all kinds of writing. In all media and formats, from plays to promotions.

What I have intended to set forth is a "Writer's Depot" where you can browse all the tools on the virtual shelf and select the ones you need to add to your creative tool shed. Take what you want, review what you'd like, and cart off as many as you can. That way, you'll be prepared for any upcoming project.

If you're committed to your own creative growth, you'll become a stronger writer, even if you jump around from medium to medium. You'll soon discover, after reading this complete guide, you'll be prepared to create compelling copy in any medium. Mostly, because you'll be equipped with a handy, all-in-one toolkit.

But, don't stop there. You'll also find an online toolkit that's packed with ancillary materials. These will serve as additional tools to reinforce the skill sets you'll be building.

Just visit www.wiley.com/go/copywriterstoolkit and you'll be privy to a plethora of informative supplements, including:

- 1 145-page Test Bank
- 2 84-page Instructor's Guide
- 3 14 PowerPoint presentations (one for each chapter)
- 4 Interactive terminology
- 5 5-page Syllabus

Feel free to refer to them for creative exercises, quiz questions, chapter reviews, key point summaries, or critical analyses. The online toolkit is an invitation to start a creative scavenger hunt where advertising solutions start with strategic thinking.



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THE PERSUASIVE WORD

Strategy ABCs: audience, benefits, and creative briefs

 *Having a clear vision of what it is that you are heading for, and know it when you see it and dismiss it when you don't see it, is really, really important. Just think from the outset about what it is that you're writing because writing is not an accident.* 

**DRUMMOND BERMAN, CREATIVE DIRECTOR/
COPYWRITER, EURO RSCG ¹**

Thinking about strategy first

Examining the brief: an up-close look

Gaining deeper audience insight through VALS and observational research

Understanding secondary audience versus primary audience

Delving into consumer insights

Realizing the importance of a benefit

Creative strategy exercises

In this first chapter, you'll examine a campaign's creative starting point: the strategy. You'll take an up-close look at the creative brief, which acts as the campaign's directional guide. You'll analyze the structure and function of the creative brief, see how it drives the strategy, and find out how it's based on several key aspects including market research, consumer insights, specific objectives, and product positioning.

You'll also learn how to create effective media intersections, or the best places for your message to collide with the consumer. In no time, you'll grasp how to use these "collision venues" or touchpoints to change or reinforce consumers' impression of the brand. You'll see selecting the right tactics (specific distribution vehicles, like online ads or mobile messages) helps propel your message to the targeted audience.

In addition, you'll realize that creating a two-way conversation with consumers can result in an unexpected backlash. That happens when consumers share their feelings (good and bad) about the brand. You'll quickly recognize that being able to analyze your audience through various means like VALS will help you create authentic and credible messages.

You'll soon comprehend the difference between primary and secondary audiences, be able to identify them, and know why you need to consider both. You'll gain insight into why some agencies copy test (ask consumers their opinion of ad messages) and some still conduct focus groups, surveys, mall interceptions, and other means of consumer research discussed later in the chapter. Finally, you'll be reminded of the importance of focusing on the benefit in your main idea. So, let's start looking at strategy right now.

Thinking about strategy first

Every advertising campaign needs a specific objective, a clear message, a target audience, and a "strategy." The strategy is the overall creative direction of a campaign, which is determined by the account and creative teams. They work together to develop an underlying solution that addresses a specific consumer benefit or need, clarifies the product or service, or solves a brand's marketing challenge. The strategy acts like a compass and allows the agency to double check that the campaign direction is on-course. For example, if the agreed-upon strategy was to show the whitening power of a detergent and the ad talked about a special two-for-one offer, then the message was off-strategy. It should be highlighting the whitening ability, not the price.

How does each agency decide the strategy? First it conducts research to gain consumer insights. What does the audience want or need? How can this product deliver a solution? What is the benefit, the reward for the consumer to make this purchase? The agency team looks to answer these and other questions and gain a deeper understanding of consumers and how they think. What they value. What's important to them? What solution the product offers. Why should they choose this product and not another.

The agency team uses the creative brief to answer these and other specific questions in order to develop a creative strategy statement to steer the campaign. The account team always thinks about the big picture, concentrates on the overall strategic direction, and looks for long-term creative solutions in its messaging. To gain greater insight into the creative-problem-solving process, we'll start by examining the elements of a creative *brief*. Then, we'll see how it serves as an outline for the campaign *strategy*, or basic creative destination.

But, before we get to the brief, we should take a look at how much of this strategic thinking has been changed over the years by technology and consumer behavior. Starting in 1900, when N.W. Ayer first introduced campaigns to fulfill the advertisers' marketing objectives,² agencies used to work in this way:

- 1 Brief
- 2 Creative strategy
- 3 Concept
- 4 Execution

First the brief was created based on client input, market research, consumer insight, advertising objectives, product positioning (in the mind of the consumer), competitors, product's uniqueness, tactics, main message, and so on. Then, the strategy was created based on the brief, a main concept was developed from the strategy, and the concept was executed.

Today, marketers are thinking about the execution as they're creating the brief. Why? Because the advertising isn't just about the concept; it's also about where the message and consumer intersect. These *media intersections* are "touchpoints," places where the campaign messages are seen by the target. Another key point is that consumers now participate in delivering the brand's message. They do this through consumer-created content and user-generated content. The difference between these two is that user-generated content are messages developed by people who use the product, not just the general public. With so many people involved in social media like Facebook, LinkedIn, Twitter, and Flickr, consumers can continue a dialogue between themselves and the brand. Or they can initiate an open conversation among members of their online community.

Consumers can share their opinions, photos, videos, and even their own impression of the brand through self-created commercials. This puts the power of selling a brand's message in the hands of the consumer, without anyone's permission. Marketers have to be careful because once a negative impression is circulated on the Internet, it's difficult to change it. Advertisers have to protect their brands' images. There are several ways they attempt to do this. Notice the word "attempt," because it's not that simple to achieve. First, they need to constantly monitor their social media sites. Second, they need to immediately address consumer complaints. Third, they need to be willing to face harsh criticism in a graceful and responsive way.

Now, unhappy consumers can create damaging user-generated content. One unforgettable 2008 United Airlines incident was globally publicized online. While the band Sons of Maxwell was on tour they witnessed the careless handling of its \$3,500 guitar by the United Airlines' baggage crew. After several unsuccessful attempts to have the airline resolve the problem, the band created a video detailing the event. It posted it on YouTube where it instantly went viral. Unlike years ago, companies today that are nonresponsive to customer complaints have to face irate, public backlash. Consumers are no longer going to sit idly by when they can broadcast their poor customer service complaints. Smart marketers are wise to address problems immediately. Most likely, that would be any brand's best corporate strategy.

Taking that one step forward, Crispin Porter + Bogusky, named agency of the decade by *Advertising Age* (December 14, 2009 issue), flies over this process entirely and starts with the end in mind: press coverage. Creative talents must write a jaw-dropping press release before they begin any creative conceptualization. They must present what the press will write about.

Then, they have to find a way to make that happen. The campaign's "big idea" must transcend medium and format. It must be so powerful it cannot be ignored. In thinking about the reaction to their work, their strategic thinking teams include cognitive anthropologists (account managers), creatives, digital technologists (developers), and anyone else who would like to work on the campaign. It's a collaborative effort in which everyone shares ownership, with credit lists of possibly 75 people.

Now, let's get back to the function and format of the brief, which is more commonly used at agencies, and how that guides the strategic direction.

Examining the brief: an up-close look

Although agencies differ in their briefs, most include the same key information. Here's a template to use for your briefs. It forces you to determine the audience, product competitors, consumer opinions, product uniqueness, and other critical areas.

We will look at the basic or shorter brief (text box 1.1) and the more expanded, detailed brief (text box 1.2).

You can see there are only eight parts to this basic brief. This will give you a good start in your overall thinking. However, before you can begin outlining your creative direction, you should go through and complete the longer brief (text box 1.2). Be sure to answer every one of the questions and fill in each answer specifically.

The brief is a series of questions that need to be carefully answered before developing a solid campaign strategy. First you need to fully understand all of the terminology. First, we'll examine some of the words used in box 1.2.

The brand is advertising to say something to _____ (VERB – persuade, convince, inform, educate) the audience (SPECIFIC CONSUMERS) that this _____ (PRODUCT, SERVICE OR BRAND) will _____ (STATE THE BENEFIT) because _____ (FEATURES THAT EXPLAIN WHY AUDIENCE SHOULD BELIEVE IT. THIS ACTS AS A SUPPORT STATEMENT).



TEMPLATES 1.1 The shorter creative brief

- 1 What is the *brand's character* or personality?
- 2 Why does the brand *want to advertise*?
- 3 Who is the *audience*?
- 4 What do they (audience members) *currently think*?
- 5 What do you *want them to think*?
- 6 Why should they *buy* this product/service?
- 7 What is the *big message* you want them to know?
- 8 What *kind of tactics* (specific ad/promotional techniques) do you want to use? For example, do you want to use viral marketing, interactive online components, out-of-home messages, print ads, transit (buses, subways, taxis, etc.), new media, direct mail, or other vehicles?



TEMPLATES 1.2 The creative brief

- 1 Why does the brand *want to advertise*? What does it want to accomplish? (Use this template.)

Creative strategy statement template

To _____ that _____ will _____ because _____.
 (verb) (audience) (brand) (benefit) (support statement / reason why)

Example

To convince fastidious moms that Tide will get out the toughest stains because of its enzyme-fighting formula.

- 2 Who is the *audience*?
 - a *Demographics*– Provides insight into audience by their age, income, education, gender, occupation (employment status), etc.
 - b *Psychographics*– Examines how audience lives. Think lifestyle, attitude, personality, behavior (like brand loyalty), and value (what’s important to them). (VALS and OBSERVATIONAL RESEARCH. Explained after box. See below.)
 - c *Geographics*– Explores where (location and kind of setting: urban, suburban, rural) audience lives.
- 3 Who are the brand’s competitors?
- 4 What do they (audience members) *currently think* (about the brand)?
- 5 What do you *want them to think* (about the brand)? (THINK CONSUMER BENEFIT. What the product does for the end-user.)
- 6 *Why should they buy* this brand (product or service)? Clearly answer: “WHY BUY?”
- 7 What is the *big message* you want them to know? (THINK SLOGAN.)
- 8 Determine what the brand’s positioning is. Do you want consumers to say it’s safe, cool, fun, reliable, etc.? (WHAT IS THE BRAND KNOWN FOR?)
- 9 What is the brand’s *USP*? (UNIQUE SELLING POINT OR PROPOSITION?) What separates this brand from its competitors?
- 10 What is the *brand’s character* or personality?
 - a What kind of personality does the brand have?
 - b Who would the brand be as a famous person?
 - c Who would that famous person be in relation to the consumer? (A coach, friend, uncle, sister, neighbor, dad?)
 - d How would that person (friend, brother, boss) speak to the consumer? How would a coach speak to team members? THINK ADJECTIVE. A coach would be authoritative, encouraging, concerned, etc. This is the brand’s *TONE OF VOICE*. (Use it in #11 below.)

- 11 What is the *tone of voice*? (HOW YOU SPEAK TO YOUR AUDIENCE: Think adjective. Refer to #10d, above.)
- 12 What *kinds of tactics* (specific ad/promotional techniques) do you want to use? For example, do you want to use viral marketing, interactive online components, ambient messages, print ads, transit (buses, subways, taxis, etc.), new media, direct mail, or other vehicles?
- 13 Think about what kind of campaign will generate press and create buzz.

The *creative strategy*, as shown in the brief (# 1) is a deceptively simple formula that explains the broad direction of the campaign. Although it looks like an easy-to-develop sentence, the challenge is to write it in the most descriptive and accurate language, specifically relating to the brand. Just fill in the blanks. Use the capped words in parentheses as explanatory guides.

The point here is to explain in detail why the brand is advertising; however you don't want to just say "to increase sales" or "to build awareness" because that could apply to any brand. Those statements are too general. This is where you want to differentiate your brand from any other. You must answer this general question in a very specific way: What do you want this campaign to do for the brand? Don't just rush in with the first obvious answer. Look deeper into the audience profile you'll outline before proceeding. Who are they? Why are you targeting them? What benefit will they derive from this product or service? What features explain why they should pick this brand and not one of its competitors?

The trick to writing a great brief is in drilling down the information. Think of it as if you're a chef and you're reducing the ingredients in a pan to create a sauce. You must reduce the information down to its core essence. This one sentence must act like a one-line review in a newspaper if this were a restaurant. Then, the campaign or "menu" is what will attract diners to taste the food or brand.

Gaining deeper audience insight through VALS and observational research

Two other important terms appeared in the brief under "Who is the Audience" in section 2b above, "Psychographics." These were *VALS* and *observational research*. VALS

connects consumer personality traits to future purchasing behaviors. VALS stands for Values, Attitudes, and Lifestyles and was created in the 1970s by SRI International, a research company, in Menlo, California. VALS market segmentation places audiences into easy-to-refer-to, shopping-prediction categories. Observational research is a method



The brief has a tiny hole. You must make an elephant go through it without tearing the paper. **JUAN SANTIAGO LAGOS, ASSOCIATE CREATIVE DIRECTOR, ZUBI ADVERTISING, NOW AT ALMA/DOB**³

of collecting consumer information by seeing them firsthand in a natural, everyday setting like at home rather than learning about them through their answers in a focus group. So, instead of asking them what magazines they read, they can see them usually lying around their homes. This sidesteps a common consumer desire to impress others in the focus group or tell researchers what they think they want to hear.

These are just two of many ways to analyze audiences. There are target groups by age-group titles. Some of the dates vary depending on the source, but you can get a quick idea of the various target groups here. These labels include the Baby Boomers (born between 1946 and 1964); the Generation X or “Gen X” (born between 1965 and 1976); the Gen Y or “Millennials,” “Gen M,” “Generation Next,” or “Generation Y” (born between 1977 and 1994); the Gen Z or “Net Generation,” “Internet Generation,” “Digital Natives,” or the “Verge Generation” (born between 1994 and 2004). These groups have attitudinal likeness or similar perspective. Even though it’s unfair to categorize any individual, researchers will create a one-word nickname, or short expression to act as a short cut to identify a group. For example, the Baby Boomers are the “never get old” group. Gen X are “independent.” Gen Y are team players. Gen Z are “digital savvy.”

There are ethnic groups, which you reach through their cultural similarities. There are interest target groups, which you speak to through their common interests, like technology buffs, wine lovers, conscientious environmentalists, and so on.

VALS, on the other hand, allows marketers to predict consumers’ future shopping behavior by considering different buying motivational categories based on consumer attitudes and values. The first VALS, or VALS 1, which explored consumers’ lifestyles and buying motivations, was later refined to reflect consumers’ ability to pay for products they desired. The revised VALS, or VALS 2, blended demographics into the mix and considered income, education, and health. VALS 2 answered the question of the strength of consumers’ buying power. Today all of the categories are used, to reflect different audience’s lifestyles, buying motivations and purchasing power. Let’s compare the two different VALS one after the other as they are so clearly explained in *Ads, Fads and Consumer Culture*.⁴ After this, we’ll compare these to VALS 3 (text box 1.3).

VALS 1: from lowest to highest income

Group I: Needs-driven consumers – Financially challenged.

- 1 *Survivors* – Poor and elderly, who are just scraping by.
- 2 *Sustainers* – Young and clever with a desire to succeed.

Group II: Outer-directed consumers – Representative in attitude, geography, and financial status as “Middle America”; concerned about other people’s opinions of them; want to leave a positive impression.

- 3 *Belongers* – Conservative traditionalists, who long for yesterday, and stick to what’s tried and true, rather than experimenting with something new.
- 4 *Emulators* – Eager, status-driven and competitive, these are up-and-comers on the path to financial success.
- 5 *Achievers* – Have reached their financial and material goals, community leaders.

Group III: Inner-directed consumers – Make purchases from their own desires, not to impress others.

- 6 *I-Am-Me's* – Young, self-focused freethinkers who do their own thing.
- 7 *Experientials*– More mature individualistic naturalists who seek self-improvement and personal growth.
- 8 *Societally Conscious* – Environmentalists interested in global conservation and consumer product protection.
- 9 *Integrateds* – Self-assured and confident, less responsive to advertising messages, may be unintentional trendspotters because of their good taste.

VALS 2

Starting at the lowest income group, moving to highest, we start with the Strugglers (Survivors in VALS 1) and end up with the Actualizers (Integrateds in VALS 1). Now there are only eight categories as follows:

- 1 *Strugglers* – Lowest income, those barely surviving financially.
- 2 *Makers* – High energy, lower income group who enjoy constructing things.
- 3 *Strivers* – Emulating Achievers without the income or skill set.
- 4 *Believers* – Like Fulfilleds with a lower income, conservatives who prefer name brands.
- 5 *Experiencers* – Avid shoppers, risk takers who relish unusual, novel, even wacky, items.
- 6 *Achievers* – Accomplished and structured, goal-oriented consumers whose purchases reflect their status.
- 7 *Fulfilled* – Mature, financially stable, who value durable, functional products, and are receptive to new ideas.
- 8 *Actualizers* – Wealthy individuals who reached their personal goals, their purchases reflect their sophisticated taste.

VALS 3

A third VALS segmentation also breaks consumers into eight categories (with some different labels) and three groups. At the bottom of the financial ladder are the Survivors with limited resources and little creative innovation. In the top group are the opposite. These are Innovators with deep resources who are highly innovative. In the middle are these six groups that represent the primary buying motivations based on their (1) ideals, (2) achievements, and need for (3) self-expression. In each of the middle groups (numbers 2–7) are low- and high-income subsets. For example, the “Ideals” group has Thinkers (higher income) and Believers (lower income).⁵

Group I: Survivors – Lowest income and lowest ability to innovate.

- 1 *Survivors* – Reluctant, brand-loyal shoppers, focus on needs not wants.

Group II: Ideals – Idealistic, inspired by moral principles and beliefs.

- 2 *Thinkers* – Informed and analytical, educated consumers who seek new knowledge, value structure, and appreciate durability (higher income)