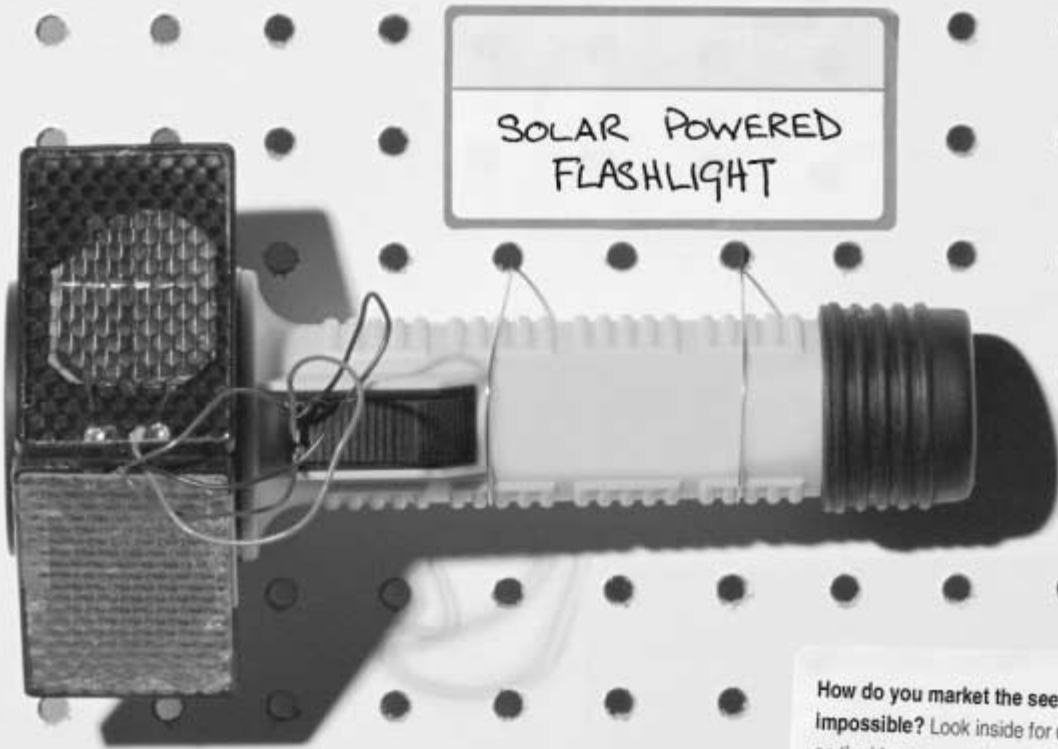


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Production, Layout and Design
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MESSAGE FROM THE PRESIDENT



Special Thanks To Volunteers & Sponsors

As we approach the halfway mark of the BCAMA 2001/2002 year, I would like to offer special thanks to everyone contributing to making this year a success.

Our Marketer of the Year Award was awarded to Ipsos-Reid in the fall. Diana Mulvey, Director of Special Events, coordinated an outstanding evening that showcased Ipsos-Reid's marketing success.

Janet Andersen, Director of our Breakfast Seminars, and Dean Fleming, Director of our Professional Marketer Seminars, have been working diligently to provide you with an extraordinary lineup of presenters this year. BCAMA Members have shown tremendous support and interest in these well-attended events.

Katherine Emberley, Director Marketing Communications, Mary Milovac, Director of Member Services, Erin Robinson, Director of Volunteer Relations, and Lisa Graff, Collegiate Relations Director, are all working tirelessly to create a broader awareness of our association. Their outstanding effort enables us to be a leading AMA chapter.

Susan Archibald, Director of Vision 2002 Conference, is collaborating daily with the Vision Committee to ensure a dynamic all day conference on May 8, 2002. (Details inside this issue.) You won't want to miss it!

Sheri Wisnowski, Web Site Director, has given our site a new look. Thanks to Sheri and her team, you will find our site much easier to navigate. Katherine Anderson, Director of Creative Services and Production, has led the team responsible for developing our collateral pieces to better reflect our brand. Well-done! Donna Burton, Editor of *marketline*, continues to equip our newsletter with thought-provoking articles from industry professionals. This issue brings us "Back to Basics" – a review on how to make the most of our marketing initiatives.

Our Executive Team: Theresa Mackay, President Elect, Sue Semeniw, Vice President, Susan Stuart, Treasurer, Tammy Towill, Past President, and myself would like to offer our gratitude and thanks to all Board Members as we move forward with this year's agenda.

Last but not least, we would like to give special thanks to our sponsors: BC Business; Wasserman & Partners Advertising Inc.; Benwell Atkins; Hot Digital Dog; Signs Now Yaletown; Quebecor; Cinanet; Gowlings, Lafleur, Henderson; Canada NewsWire. Our sponsors are an integral part of our association, making it possible for the BCAMA to serve the marketing community successfully.

Maureen Rutherford

Maureen Rutherford, BCAMA President

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This Year's Speakers



DAVID FOOT

In a two-hour presentation, David Foot will provide his latest thinking on North American demographic trends, insight into global economic trends, and implications for marketers. David Foot is the best-selling author of *Boom, Bust and Echo* and a University of Toronto professor.



CLIFF FREEMAN

Learn about Cliff Freeman's views on communicating with consumers. The creator of Wendy's "Where's The Beef?" campaign and Mounds / Almond Joy's "Sometimes You Feel Like A Nut, Sometimes You Don't"; winner of 97 Clio's, 34 One Show awards, and 41 Cannes Lions; and a highly respected agency creative, Cliff Freeman is Chairman and Chief Creative Officer of Cliff Freeman & Partners.



GRANT McCracken

Learn about customer behaviour and its effect on marketing and branding from cultural anthropologist Grant McCracken. A highly sought after authority on consumers and culture, Grant McCracken, from Harvard Business School, is the author of 5 books and has appeared on Oprah, CBC Morningside, and in Advertising Age, New York Times, and Newsweek.



ALAN MIDDLETON

Presenting the latest thinking on branding, Alan Middleton draws upon his extensive experience as a former president of major advertising agencies in Canada and Japan and as an academic. A frequent speaker at conferences on marketing and international business subjects, Alan Middleton is Executive Director and Assistant Professor, Division of Executive Development, Schulich School of Business, York University.



TONY PIGOTT

How do you reinvigorate a brand and how do you handle a brand crisis? Using case studies and a global approach in his presentation, Tony Pigott will speak on energizing and revitalizing famous, established branded businesses. Tony Pigott is President and CEO, JWT Group Canada.



KEITH REINHARD

Keith Reinhard, Chairman, DDB Worldwide Communications Group Inc. presents his thoughts on how advertising should be reinvented. In the brave new world Keith Reinhard envisions, consumers will receive only those messages they choose to receive and advertising will have to adapt and assume new forms to ensure a front and centre role in brand building.



Vision 2002 is a full day conference focusing on future marketing and advertising trends. In its 13-year history, Vision has become Western Canada's premier marketing conference by offering industry practitioners a chance to gain valuable insight from some of the most high profile marketing minds in the world.

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CAREER CORNER

	 Roy Osing	 Ken MacAlpine	 John Ridley
Company	Telus Corporation	Medbroadcast	Global Television Network – BC
Title with brief job description	Executive Vice-President, Enterprise Marketing and Chief Marketing Officer. I provide leadership across all TELUS business unit marketing teams to ensure an efficient, effective and unified marketing effort on behalf of TELUS. I also ensure our company's strategic plan is executed from a marketing point of view.	Director, Business Development. I'm responsible for the development, implementation and management of strategic sales initiatives for the company. I coordinate all sales activities between Medbroadcast and our sales team at CanWest Interactive, sell site sponsorships and other communications services and lead the development of new revenue producing programs.	Director of Promotion, Community Relations Manager. I manage the promotion departments for Global BC and CH Vancouver Island, primarily focused on strategy and the production of all television creative that position brands in BC.
Route to present job?	I joined BC TEL, as it then was, in 1969 as a systems analyst after obtaining my degree in computer science. I was intrigued by the marketing side of the company and started down a path towards it, alternating between operations and marketing. I have been an executive at BC TEL and TELUS for the last 15 years, mostly running business units and leading our marketing efforts.	I developed a background in medical research by working in a research laboratory. Later I moved on to pharmaceutical and medical equipment sales and marketing. About 10 years ago I began to specialize in marketing communications for health care. This job allows me use my medical and communications background in the development and promotion of unique, web-based consumer health care information products.	My career began as a freelance producer in commercial production to commercial writer-producer, and then creative director. In 1992, I became promotion director in the original CanWest television operation CVKND. After five years, I managed the network brand rollout of U.TV in Vancouver – Global. In 2001, I moved to BCTV to direct the re-brand to Global BC and the re-brand of CHEK to CH Vancouver Island.
Best advice that impacted your career?	I've been significantly influenced by Peter Drucker, who has had tremendous insight into how businesses should be led and managed. Tom Peters has also been a big influence. The data and findings of his work are so practical to enable direct implementation.	Maintain your resolve because you may suffer some setbacks along the way. But, if you have chosen a path that you love and have confidence in your abilities, you can shake off the setbacks, learn from them and move on to achieve your objectives.	Know your target audience and produce creative that delivers a clear, concise message. Don't get into a hunt for awards, it distracts you from your mission. When you feel totally stressed, just look back at what you've accomplished. Your heart rate will come down.
What was or is your biggest career challenge?	Speed. To be competitive in any industry, but particularly in the data, Internet and wireless communications world, you've got to be able to adopt and adapt fast. My challenge is to ensure, from a marketing perspective, a large company like TELUS moves quickly enough to stay ahead.	As a freelancer in the communications business, it was a challenge to manage project flow against income and to avoid the "feast or famine" revenue cycle.	With the launch of the CHUM brand in BC and CTV's strategy to position itself as closely to the old BCTV look as it can, the present environment is the most challenging. We have maintained a loyal audience to the BCTV News brand over decades and integrated it into the Global culture of the top television programming in the market.
What do you like most and least about your job?	The opportunity to be innovative and creative and to lead in new territories is exciting and rewarding to me. What can be tough is tied to the previous question: staying on top of changes in the market and industry and ensuring our strategies move ahead quickly.	Most: Wearing many hats! I get involved in planning, editorial, production, business development and sales of communications products in print, web and television. Least: Not getting things done fast enough.	Most: The Changes. The broadcast industry is constantly evolving with new technologies, more programming options and the uncertainty of the web's presence in relation to audiences and the entertainment industry. Least: Having to say no to a not-for-profit that needs your support for their initiative. When you're big, demand is heavy and occasionally you turn some marvelous charities over to your competitors.
What advice would you give someone thinking of entering your line of work?	Do two things exceedingly well. First, relate and translate the corporate strategy into a meaningful and effective marketing strategy. Second, once you have your strategic marketing plan, you must tenaciously execute the strategy. You can get the strategy 80 per cent right, but it must be 100 per cent executed.	The most important thing is being able to "tune in" to client needs. Start on the client side of the desk and get familiar with the business and its customers. At the same time, keep an open mind and explore the various communications techniques and tactics available and how they might apply to your business. When the time is right, move to the agency side and apply what you've learned as a client.	Start in a small market. You'll get the opportunity to multi-task, which you won't in big markets. Experience is key. Learn to do it the hard way, where the resources are thin.
Salary range expectations	Salaries are as varied as the number of marketing-related positions and companies and agencies that exist. But, imagination, execution and professionalism are rewarded.	Total compensation should be in the neighbourhood of \$75,000 +.	Depending on education and responsibilities, an experienced broadcast manager on the production/marketing side could make from \$60,000 to \$100,000+ in a major market in Canada.



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BACK TO BASICS

Moving forward with our marketing initiatives often means reflecting on whether or not we have all the basics covered, especially during times of economic uncertainty.

Are you a seasoned marketer? New to the marketing industry? Regardless of your level of experience, it is easy to lose sight of the basics of marketing that contribute greatly to success.

Over the next few pages, leading industry professionals share their insight and expertise on various topics and provide us with fundamental marketing principles that will help see us through the tough times and beyond.

The Role Of Marketing Within Your Organization: Aligning Marketing With Your Business Model – John Harris, VP Marketing & Sales, Ballard Power Systems

Marketing Technologies: A Front-end/Back-end Look at Technologies That Maximize Marketing Efforts – Lance Bracken, President, Corporate Communications Training College

Developing Your Brand Personality: How Do You Differentiate Your Products From The Rest? – Cindy Stewart, Evolutionist, WOW! A Branding Company

Brand Building in Tough Times – Alvin Wasserman, President, Wasserman & Partners Advertising Inc.

Creating A Marketing Plan: A Practical How-to-Guide – Linda Lee and Denise Hayes, Principals, Strategex Consulting Group



The Role of Marketing within Your Organization:

Aligning Marketing With Your Business Model

*By John Harris, Vice-President Marketing and Sales,
Ballard Power Systems*

If you ask someone outside of the marketing profession for their perceptions of the job, you will likely hear comments that conjure up images of glossy ad campaigns and new product launches complete with glamorous models and gala events. Others may relate the classic Dilbert cartoon series where Dilbert, an engineer at a large company, is transferred to the marketing department and finds a utopia where people continuously socialize under a "Two Drink Minimum" sign that hangs over the department bar. The reality, however, is that most marketing work is conceived and executed in a much more down-to-earth environment. While glossy campaigns and posh events work well for marketing luxury goods, successful businesses follow a strategy that aligns marketing with an incisive understanding of target users and their needs.

Given our current business status and customer profile that spans industries from backup and portable power products to the auto industry, Ballard's marketing activities today are far removed from mass-media television and billboard campaigns. Instead, our efforts have focused on building strong relationships with our customers and working closely with them in their product development process to integrate Ballard® fuel cells into products for their customers. Building on our vision, "Power to Change the World®," our customers clearly recognize and value our commitment to support them in developing a new generation of products that maintain their leadership positions within their own industries.

It is through the success of these close partnerships that we are able to understand our ultimate market, the end user, and ensure that our business is structured to deliver products that provide a real benefit. From research to product development to manufacturing, the customer's voice and our ability to respond are paramount in ensuring we maintain our competitive lead. The process of building these relationships has been focused, steady and productive. Ground-level foundation activities include ongoing attendance at strategic industry trade shows and conferences, articles in a wide variety of publications, and participation in key seminars and speaking engagements. Such activities have been invaluable in allowing us to interface with partners and customers to understand their needs, concerns, and expectations. Even more important are the ongoing face to face meetings and other communications that keep a relationship alive and moving forward.

Without our proactive business to business marketing and relationship building strategies, supported by truly superior products, it is unlikely that Ballard would have the strong customer base we enjoy today, nor our industry leadership position. However, as a company producing a unique new technology with the potential for use in virtually any application that requires power, we recognize that our business success is not based on technology-push alone. The end user's voice is vital to direct us in creating beneficial products for businesses, industrial power stations, consumer homes and the highways of the world. Ultimately, it is the tremendous power of consumer demand that will drive mass acceptance of Ballard's products, just as it did for automobiles, television, personal computers and cellular phones during their respective early years.

With consumers bombarded with information and product messages daily, like any other organization trying to be heard, we need to focus and reach the key early adopters who will help us expand into majority markets. At the same time, marketing budgets are under increased scrutiny and pressure for results that can be clearly measured, if not immediately seen on the bottom line. As a result, marketing departments today must find new and creative methods that reach target audiences in a manner that achieves the absolute best return for dollars invested.

Given our stage in growth, mass-market routes such as television, radio and print advertising have not yet been part of our matrix. Instead, our tools include targeted public relations activities that lead to coverage in trade journals, newspapers, magazines and on television programs around the world. Whenever a significant news release is issued or Ballard is in attendance at a key industry trade show, a media relations campaign including proactive calls and interview placement occurs. In benchmarking the success of our activities, research results clearly show that our messages do in fact reach target business and media audiences through this method. The approach is also proving successful with consumer audiences as we field inquiries daily from consumers around the world and from today's students – the consumers of tomorrow.

If our target market were urban North American kids in the 10 to 12 age range, our strategies and programs would be entirely different. Ads on MuchMusic and MTV, contests and other promotions would be the norm. That's the beauty and excitement of marketing – you are able to do things differently as your business model and audience changes. There is no doubt that as Ballard's fuel cell business evolves, so will our marketing strategies and activities. Perhaps this is the real allure of marketing, both to those inside and outside the profession; the opportunity to steadily evolve in creativity and productivity, supported by an unflagging desire to know and respond to your customer and markets. This is part of what makes each day at Ballard more interesting and exciting than the day before.

BALLARD®

Marketing Technologies: A Front-end/Back-end Look at Technologies That Maximize Marketing Efforts

By Lance Bracken, President and CEO, Corporate Communications Training College

With the rapid changing world of technologies, and especially with the addition of the Internet to the equation, it can be difficult to remain clear about where exactly technologies fit into the marketing formula. Simply put, marketing technologies help people become more productive, efficient and effective in the planning, management and execution of marketing related activities.

The proportion of marketing technologies used in-house versus those out-sourced varies between companies, often depending on the size of the company and how it sets up its business model. When a new technology is first introduced, companies do not often have the in-house expertise to use or utilize this technology. Consequently, services are out-sourced to commercial specialty firms/individuals. As the technology matures, the tool-set standardizes and becomes easier to use, and then over time, that expertise moves in-house. The introduction of web publishing over the last few years is an excellent example of this natural evolution.

To profile technologies as they relate to marketing, I have grouped areas as they relate to different activities and separate skill-sets. Broadly speaking, there are five areas where technology supports marketing:

1. Marketing, Promotions and Sales – communications/promotions
2. Desktop Publishing – marketing collateral materials
3. Web Design and Publishing – web front-end or presentation logic
4. Web Programming and Development – web back-end or business logic
5. Infrastructure Systems – hardware and software support systems

While we make an attempt to departmentalize the areas and the ways in which technology supports marketing, there are definite relationships, overlaps and common threads in association with these different areas.

Taking each of these areas in turn, the immediate day-to-day activities of planning, managing and executing marketing, promotions and sales initiatives are supported by various technologies. Of the five broad-based areas this is also the area that drives and directs the other four. Technology supports executive planning by providing current client data (databases) for analysis. Spreadsheets make number analysis efficient, while presentation graphics provide visual representations of this information. The integration of phone, fax, e-mail with client/contact databases, an inner office network and Internet connectivity are other ways that technology supports those in marketing, promotions and sales.

It is obvious how collateral materials and desktop publishing support marketing. This whole evolution of press technologies has greatly reduced the cost of production, increased the efficiencies of time and put the control of materials production in the hands of businesses. While visual art and/or graphic design direct all the hardware and software technology, it is marketing materials that are being graphically produced. Consequently the technology is supporting marketing, and marketing is the driving force behind materials production.

The area of web design and publishing is very similar to that of desktop publishing. Instead of print material, we have what we affectionately call brochure-ware. These technologies provide essentially the same composition of photos, graphics and text into the graphic representation of the marketing message. But rather than printing the materials, they are hosted on the web, providing further efficiencies of time and saving costs because materials can be updated in a timely matter without printing expenditures. The ability to include animation, video and sound adds to the effectiveness of the marketing effort as well.

Web programming and development or the back-end of web technologies is the area of mystery for most companies when it comes to marketing support. In a lot of respects, the back-end is a natural evolution of the front-end of presentation logic. Over the last three or four years, company web sites have grown in the number of pages and their complexity. Companies are adding back-end database-driven infrastructures. These additions move the web site away from being composed primarily of static content pages towards being a database-driven web site, allowing for greater interactivity for the users. These technologies also allow users greater amounts of information in a more timely and cost-effective manner.

Infrastructure systems is the foundation for all other areas of marketing support technologies. Databases are part and parcel of many aspects of marketing, and when we think of efficiency being technology's strongest contribution to marketing, it is easy to see that databases are central to many marketing related activities. Apart from database systems, local area networks, internetworking and web application systems are now fundamental to the foundation of most businesses.

With the applied use of a full range of Internet, information and other technology-based systems, marketers can better use and utilize web-based technology systems and apply this understanding to the expectations placed on them as they undertake marketing initiatives.



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Developing Your Brand Personality: How Do You Differentiate Your Products From The Rest?

By *Cindy Stewart, Evolutionist, WOW! A Branding Co.*

The Evolution of Brand Personality

A chat with any antique dealer will quickly confirm that the development of brands existed by the 13th century. Artisans branded their products with utilitarian imagery resulting from brand monograms for date, artist and manufacturer. Brand personality was in full swing by the 20th century. Santa Claus, as we know him today, was created by Coca-Cola in 1931 to demonstrate a product's use as a reward for a job well done!

Until the mid 70's, brand personality was defined by brand fashion: logos, taglines, colour stories, packaging, and creative defining product uses and attributes. With the onslaught of Japanese competition in the late 70's, it was product quality that dominated brand personality development well into the mid 90's. Quality had become the cost of entry.

Consumers' marketing sophistication had rapidly matured and the application of consumer research entered the mainstream. A brand's consumer had evolved from a product end-user to all constituents of the firm experiencing the brand through every point of emotional, sensory and physical contact. Consumers wanted to know more about what a company believed in not just what the company did. As such, post-modern branding was born with the introduction of corporate values, beliefs and social cause.

Post-Modern Brand Personality

Although often thought to be the same, brand personality is a subset of brand identity. Since personality perceptions drive purchase interest, there is no substitute for a unique product personality. Like people, all products have a personality and the personality can have a positive or negative characterization.

Brand personality is the set of human characteristics associated with the brand by consumers based on the "Big Five" personality dimensions. These include being reliable, strong, modern, creative, simple, cheerful and trustworthy. The greater the alignment between the individual's actual or ideal self and the brand personality, the greater the brand preference. Most emotional associations resulting from product attributes have less impact on building sustainable competitive advantages because they are easily attacked and copied.

Brand personality is communicated to consumers through brand imagery that is created to define the

ideal user, product endorsers and employees of the firm. It is also indirectly communicated through product attributes, category associations, brand name, symbol or logo, price, advertising style and distribution channel. The trick is to ensure that direct and indirect communication consistently expresses the brand personality through the demographic profile of the actual product users. For example, The Gap's ideal users are consistently portrayed as young adults – fashionable, urban casual, value-oriented and outgoing.

Knowing the brand personality and how customers relate to your brand allows you to identify the consumer of your product, the market segment you should be in and a key way to differentiate. But all roads from brand personality don't necessarily lead to brand equity. To leverage brand personality, it must be consistently reflected in every emotional, sensory and physical touch point, be compelling to foster memorable distinctiveness and managed over time.

As product segments and their critical success factors change, so too must the brand personality. The adaptations to your brand personality must be consumer-driven. Changes in the product segment and consumer personality associations documented by marketing research whether primary or secondary data should be the catalyst for brand personality modifications.

Making it Real: Developing a Personality

Developing brand personality depends on whether your product is new and revolutionary.

"If your product and its market already exist, the brand personality is what the marketplace thinks of you," says Dann Ilicic, Chief Perceptionist at WOW! A Branding Company. Before you can take steps to move the brand personality forward you must have a clear understanding of the existing emotional and self-expressive associations being made by your customers. With a futuristic orientation, you then need to examine the relevance of these associations to the critical success factors of the product segment and in relation to your competitors.

Paint your brand landscape, define your product segment as well as the utilitarian and self-associations of your brand and you will develop a personality that will be memorable to both your consumers and your business.





Brand Building in Tough Times

By Alvin Wasserman, President,
Wasserman and Partners Advertising Inc.

What used to be a subtle interplay between the strength of the economy and the strength of established brands has become a lockstep tango (no relation to the quasi-new airline Air Canada recently rolled out).

Long years of advertising, shelf or consumer presence and habit have built a fortress for brand leaders in most categories. The "emerging" brands wishing to make rapid progress are having a harder time than ever breaking through and making significant gains.

New media, e-commerce, and database management have given the newcomers new tools and new hope but not much else. A well-documented fact is that the new "models" for brand and business building have fallen like dominos over the last two years.

But there are signs the momentum may be shifting. The truth is that sustaining a brand now is no piece of cake, and some of the brand leaders are stumbling and losing sight of what got them to where they are.

That said, tough times are often the best times to build brands. When cost cutting is the magic word, investment spending goes farther. Now may be the time to invest in your brand, as competitors are pulling in and consumers searching. Here are four thoughts to keep in mind in tough times.

1 Localization

In a recent conversation with a manager for a huge North American chain, the frustrations displayed were more than the usual out-of-the-loop grousing. The amount of time needed to get a decision from a bloated head office, complete with ever-expanding procedures, checks and balances, was impacting the business in a major way. It seems opportunities do not always march in step with corporate timetables. What a surprise.

This centralized approach comes at its own price. It often equals homogenization and it flies in the face of what people are increasingly looking for across almost all categories right now – special treatment, sense of community, intimacy and what I call "one-to-one" consciousness.

The time delay between the head office "foot" and the regional market "pedal" could prove challenging to say the least.

Tying public relations to advertising and web activity in a blend of image and scrimmage work could be your most effective weapon on the ground.

#2: Speed

Meanwhile, the barriers facing emerging brands in the past are starting to be bridged by clever tactics and can be overcome by nimble marketers. The machinery for sophisticated Customer Relationship Management once reserved for the big guns is now becoming more accessible and affordable on a regional level.

Initiatives that used to take months to execute can now be done in weeks and even days if the proper brand prep has been put into place.

Tactics for time crunching are being ever more creative. The key is taking the extra layers out of the briefing and approval process.

What we are now seeing are new openings for marketers brave enough to go beyond the traditional transactional customer model and on to the next level, intimacy.

#3: New "Intimacy" Enabling Technology

Technical reality makes it easier to get close to your customers if you're physically in the same time zone or if you're mentally in the same universe. Watch for the now exploding world of email to get significant enhancements. Making brand imagery the dominant voice in all communications including e-messaging sounds easy. Few companies have been able to pull it off in a consistent manner.

There is an underlying brand reality to all this. A lot of things have changed, but many things haven't. At the core of the brand is a relationship with consumers and it's this relationship that needs to be enhanced in these difficult times.

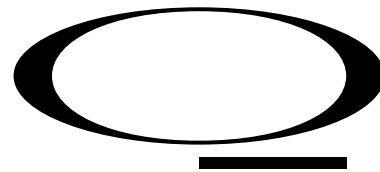
#4: Raw Nerve

Larger, more remote control companies, rarely have the stomach for controversy, edge or limit pushing. Whether it be in choice of media mix, creative approvals, budget making based on opportunities rather than percentages, the entrepreneurial advantage is again clear. We have many examples here in British Columbia of marketers who eschewed the norms of their business sector and grew their businesses against all odds.

Being bold and taking some strategic risks can pay off big in a static market. When the pond is still, one well-dropped stone can make big waves.



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Linda Lee

Creating a Marketing Plan: A Practical How-to Guide

This article is a summary of a tutorial that was originally published by the American Marketing Association's MarketingPower, Inc. and is reprinted by permission. For the full tutorial, go to www.marketingpower.com.

By Linda Lee and Denise Hayes, Principals, Strategex Consulting Group

Any organization that sells a product or service to customers needs a formal marketing plan. Depending on your needs, your marketing plan may be just a few pages or, with supporting material, run into the hundreds of pages. However, even in the largest and most sophisticated organizations, the core marketing plan document should be clear and concise and state the few key strategies that the organization will be undertaking.

What a Marketing Plan Does

A formal marketing planning process provides structure and rigor to decision-making. It culminates in a written plan that typically is prepared once a year and updated throughout the year or prior to a significant new marketing initiative that requires an investment of budget and/or internal resources.

Marketing Plan Structure

There are two key components of the marketing plan:

1. The Situation Analysis
2. The Marketing Plan

The situation analysis is a factual document and analyzes the information that you have gathered in preparation for writing the marketing plan. It answers two key questions:

1. What economic and business environments are you experiencing?
2. What opportunities and problems are you facing?

The marketing plan lays out the objectives, strategies and sub-strategies for a specific timeframe, usually a year. It answers the following questions:

- What business objectives do you expect to achieve?
- What exactly do you sell?
- Who are your customers?
- Why should they buy your product or service rather than your competitors'?
- How will you communicate your product or service to your customers?
- Who will do what, when?
- How are you going to measure your progress so you can learn from the experience?

The marketing plan is not complete or credible without the situation analysis as it provides the rationale for the

decisions being made in the marketing plan. The key headings in a situation analysis may include the following:

- Macro environment (the big picture)
- Market (size, share, growth, seasonal trends, etc.)
- Internal Trends (sales volume by month and annually, revenue, profits)
- Product or Service (description of the products or services you are selling)
- Competition (size, market share, key success factors)
- Consumer or Customer (segmentation, attitudes and behaviour)
- Distribution Channels (direct and indirect channels)
- Evaluation of Previous Marketing Initiatives
- Strengths, Weaknesses, Opportunities, and Threats
- Issues Analysis

The key headings in a marketing plan may include the following:

- Objectives
- Strategies
- Tactics
- Product
- Price
- Distribution
- Advertising and Promotion
- Research and Evaluation
- Financials (budget and profit & loss statements)

The types of information that should be included under a few of the headings are listed in the next section. Remember that the situation analysis is a factual document so you should use quantifiable information wherever possible and always state your sources so you can find them again next year or delve deeper into the information at a later date.

The Situation Analysis

Market

This section defines and describes your market. The question of "What market are you in?" is quite simple but requires some thought. What is your geographic market – specific regions of a country, nation-wide, several countries, or global? What market or industry are you in? If your organization makes pencils, are you in the pencil industry, the writing instrument industry, or the communication tools industry?

Once you have defined your market, you should gather the facts to answer the following questions to describe your market:

- How is your industry structured?
- How big is your market? What are the overall trends and developments in your market?
- Are there segments in your market? If so, what are the trends and developments in each segment?
- What is the rate of market growth or shrinkage over time?
- Are there any differences in market growth by time of year?
- How big are your competitors? A market share table should be included here.

Denise Hayes



- What are the key factors for success in the market?

For each of these questions, ask the additional questions “Why?” and “What are the implications for my business?”

Consumer or Customer

This section reviews and analyzes your consumers and/or customers. The specific questions to answer include the following:

- Can your consumers or customers be segmented based on common characteristics?
- Quantify each consumer or customer segment by size, frequency, profitability, and any other grouping that makes sense in your industry.
- For each segment, especially the largest and/or most profitable segments, ask these further questions about the consumers or customers within them. If you have some very important customers who make up a large percentage of your business, analyze their key characteristics individually.
- What are the demographics of your consumers?
- What products or services do each buy?
- How do they buy your products and services?
- Where do they buy your products and services?
- Why do they buy your products and services?
- What are their attitudes toward your product or service versus your competitors’?

Issues Analysis

This section analyzes all the learning from the previous sections and lays out the few key issues that your organization or product/service needs to address in the marketing plan.

The Marketing Plan

Objectives

The objectives are the quantifiable results that you expect your marketing plan to achieve and are realistic and achievable, yet challenging. Objectives are typically stated as sales volume, market share, profitability, or consumer awareness to be achieved by a specific timeframe, compared to a previous timeframe. Make sure that the objectives you set can actually be measured. For example, do not choose market share as an objective if you do not have a method of measuring it. A sample objective could read as follows: To achieve sales of 35,500 cases of pencils in 2002, an increase of 5.4% over 2001.

Strategies

Strategies describe the broad direction the organization will take to achieve the stated objectives. Strategies are long-term while tactics are short-term actions to achieve the implementation of a strategy. The questions your strategies should be answering include the following:

- What market or industry will your organization be competing in?
- Who are your target customers or consumers?
- How will your organization or product/service be positioned?

- Why should consumers or customers buy your product or service rather than your competitors’?
- What broad changes do you plan to make to your product, price, distribution, advertising and promotion, and research and evaluation?

Tactics

This section describes in detail the tactics or short-term actions you will use to implement the strategies outlined in the previous section. You may have several tactics in each category. Each tactic in each category should be described in enough detail to answer the following questions:

- What quantifiable objectives do you plan to achieve?
- What exactly do you plan to do?
- Why do you plan to do this? How will this improve the organization?
- Who will be responsible for each action?
- How long will it take and when will it be done?
- How much will it cost?
- What evaluation mechanisms will you use?

Research and Evaluation

This section describes the ways you will measure the overall objectives, summarizes the evaluation tools you will use to track the effectiveness of the strategies and tactics, and describes the research you will use to obtain any information that you were unable to obtain for the situation analysis of this marketing plan.

Financials

The financials should include two documents:

1. A marketing budget
2. A profit and loss statement

The marketing budget includes all the costs associated with the strategies and tactics that fall in the marketing area of responsibility. The profit and loss statement essentially demonstrates the financial effect of the initiatives in the marketing plan. It covers the business unit or product category that is the subject of the marketing plan.

Getting Started

If this is the first time your organization has prepared a marketing plan, it may seem daunting. You may not have all of the pieces of information you need. First, find out what information you already have and what you need to obtain. Then, gather all the information you can for this year. For the information that you are not able to obtain, either because of budget or because it would require a research study, include it as a planned tactic in the research and evaluation section of the marketing plan.

Writing a well thought-out marketing plan is not easy but the structure and rigor it brings to decision-making will increase the ability of your organization to meet its business objectives.



DM TREND IS TO FOCUS, FOCUS, FOCUS

By Kim Symons, DM Strategy and Creative Expert,
Vancouver, BC www.kimsymons.com

Recently, while serving as a Judge for the Caples International Direct Marketing Awards at the New York University Center for Direct & Interactive Marketing, I had the opportunity to see the full range of trends currently in use in direct marketing.

In reviewing hundreds of campaigns from the gigantic, big budget to the straightforward traditional letter it was striking how the fundamentals remain the same. The difference is that we now have the advantage of greater personalization options, which can be a tremendously useful tool if used properly.

But in all direct marketing, the first challenge is to create a piece that is impossible not to open in the

first place. That doesn't necessarily mean something cute or clever or funny. It means showing your prospects up front that you know them and their needs. Think of it as being able to say to them something like, 'Hey Bob, I heard you have a headache so inside is some aspirin!'

That's obviously a simplification but the key point is – the best advertising is 'word of mouth'. What great direct marketing does is build that same kind of one-to-one conversation on a massive scale.

The challenge is to understand customer data and then translate that into a meaningful personal dialogue. The share-of-customer that can be achieved by doing so is what makes it so important to continually strive for that goal.



BCAMA MEMBERSHIP HAS ITS PRIVILEGES

The American Marketing Association is an international professional society for members of the marketing community. Founded over 50 years ago, the AMA provides an educational and social forum for marketers and is open to anyone involved in the marketing industry. The local BC Chapter has over 500 professional and over 100 student members. Our international membership is quite staggering with over 45,000 members.

The British Columbia Chapter of the American Marketing Association (BCAMA) is one of the most highly regarded chapters of any in North America based on our success in membership, programming and financial results. The BC Chapter won the prestigious international "Chapter of the Year Award" in 1995, 1996, and "Chapter Excellence" in 1997.

The BCAMA provides its members with various avenues to tap into marketing expertise at local,

national and international levels. Vancouver's own Alvin Wasserman, President, Wasserman & Partners and Advertising, was just one of the many notable panelists that presented us with a leading edge seminar on online branding at the BCAMA Vision 2001 Conference. One of Canada's most notable national marketers Mr. Alastair McCluskey, Director of Brand Management at Bell Canada, Toronto has also shared his insight with us this year at one of our spring Professional Marketer Series events. Our 2001 Vision Committee attracted Barbara Caplan, Partner, Yankelovich Inc., New York and Tim Love, Global Account Director and Executive Vice President/Managing Partner Saatchi & Saatchi, New York.

Membership in BCAMA affords you free subscriptions to *marketline* and *Marketing News* and exceptional networking opportunities. Find out more at www.bcama.com.

BCAMA Calendar of Events

Tuesday, March 5, 2002

Topic: Tales From The Rails: Branding Of The "Trip of a Lifetime"

Speaker: Graham Gilley, VP Marketing, Rocky Mountaineer Rail Tours

Location: Four Seasons Hotel, 791 West Georgia Street, Vancouver

Reception and Registration: 5:30 – 6:30PM

Seminar: 6:30 – 8:00PM

Thursday, April 11, 2002

Topic: Conflict Skills: Building Relationships

Speaker: Gerrie Waugh, BC Registered Psychologist, Business Instructor, Capilano College

Location: Four Seasons Hotel, 791 West Georgia Street, Vancouver

Reception and Registration: 7:00 – 7:15AM

Seminar: 7:15 – 9:00AM

Wednesday, May 8, 2002

Vision 2002 Conference

Location: Westin Bayshore Resort & Marina, 1601 Bayshore Road, Vancouver

Registration: 7:00AM – 8:00AM

Conference: 8:00AM – 5:00PM

June 2002

BCAMA AGM Wrap Up Party

Location: TBD

To register for a BCAMA event or to obtain information regarding upcoming events, call the BCAMA office at 604-683-7718 or visit us at www.bcama.com.

Ooops... In *marketline* fall 2001, in the inside section, Clearly Canadian should have read Clearly Creative.



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The BCAMA Office
PO Box 3019, 349 West Georgia Street
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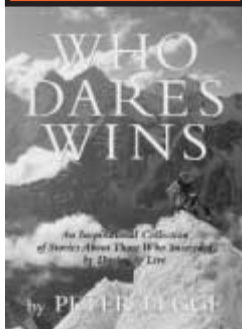
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- [6] Gift certificates are a cop out
- [7] It's not owned by CanWest
- [8] Your sister works there
- [9] Almost no articles anymore on e-commerce
- [10] The photos in Shiftwork prove only beautiful people get hired



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