

12 Action

It is time to instigate all aspects of planning the delivery of your live brand experience. This part of the plan is of utmost importance. You, or your agencies, can come up with the most innovative and groundbreaking concepts and strategies, but if your campaign activation and project management are flawed, then it was all a waste of time and money. The execution of a successful experiential marketing campaign, especially the live brand experience, is not an easy task, and should be regarded as being like the production of a movie, but without the opportunity to edit later.

This would be a good place to reinforce an earlier recommendation: employ a specialist experiential marketing agency for the execution of your campaign. Some experiential marketing agencies have a stronger background in strategy, while others are more experienced in activation. This is an important distinction to make when choosing an agency to activate the campaign. In fact, some experiential marketing agencies outsource the Action part to other more action-oriented experiential marketing agencies. The ideal situation is to work with a fully integrated experiential marketing agency that has expert strategy/planning/creative and activation/logistics/staffing in-house. The reason is that communication between planners and activators needs to be clear, with great attention to detail. Without this communication, what is promised to a client may be very different to what is delivered. In addition, the more attention to detail and experienced thinking that goes into the Action plans, the higher the chances that those following it will succeed.

This chapter should prove useful whether you are a traditional agency that is outsourcing to an experiential marketing agency, or a

client working directly with the experiential marketing agency. From a client perspective, this chapter can provide a guide that will help when discerning between a good detailed activation plan and a poor one. Obviously, different agencies may be inclined to involve their clients in the small details of the Action plan to a greater or lesser degree. However, most will aim to accommodate a client's request to see any of the planning. Even if you are an experiential marketing practitioner yourself, this chapter will provide an outline for best practice for the Action part of your campaign planning.

Contents of the Action plan

The action part of your SET MESSAGE plan should include the following sections:

1. Recipe (how the experience will actually happen from a consumer perspective).
2. Budgets.
3. Project plans (WBS, Gantt chart, critical path analysis, schedules, risk analysis, checklists and external analysis).
4. Communication and collaboration.
5. Suppliers and third parties.
6. Approvals schedule.

1. The recipe

Every live brand experience has behind-the-scenes activity and a great deal of careful coordination, and it is important not to lose sight of consumer perspective. The Target audience, and participants' experience, is extremely important. The Action plan starts with a breakdown of what happens if you are looking at it from the perspective of the Target audience. This part comes first in Action planning because it will keep the rest of the plan grounded; it is a blueprint summary of what will happen 'live'.

The best way to write the recipe is to think of it as similar to a good cake recipe. It should start with a paragraph stating the ingredients (including quantities) that will be in place, and specifying where the experience will be positioned (whilst naming the set, the campaign and the team). This introductory paragraph creates a still photographic image in the mind of the reader of your plan. For example:

The 106.9 Radio Experience is positioned outside a surfing festival and includes: the Radio Experience Zone (one giant radio set, two branded DJ Hummers, two sampling trolleys, one branded reception counter, lots of branded tables and chairs), and the '106.9 Team' (a team of 10 Brand ambassadors, one DJ and one event manager).

This paragraph sets the scene of the plan in the mind of the reader, because it allows him or her to correctly visualize the physical elements that will be in place. This is a vital step, as it provides clarity to both the people who are buying the campaign, and the people who are executing it.

After the summary paragraph, the recipe continues in a similar manner to that of a cake, by breaking down systematically what will happen and what actions are involved in the experience itself. This should be formatted as a numbered list of summarized steps. For example:

- a. The DJ is playing funky music and hosting on the microphone.
- b. The 106.9 Brand ambassadors approach the target audience and invite them to participate in the experience.
- c. The target audience signs in at the front counter.
- d. The target audience is greeted by Brand ambassadors that bring them into the Radio Zone.
- e. Once inside the Radio Zone, consumers can make their own compilation CDs.
- f. As the consumers leave the Zone, they receive branded goody bags containing a branded iPod case, a free concert ticket and stickers.

As you can see, this numbered list allows a moving image to be visualized in the mind of the reader, or executor, which is key in creating a framework and story for the experience. This step should also facilitate estimating the duration of the experience, as well as the maximum number of participants at any one time. This is highly important because it will then allow you to calculate how many consumers can potentially participate in the experience per day and location. By multiplying these figures by the number of live days and locations, you will get the number of interactions. This, as previously mentioned, is a crucial common metric when measuring live brand experiences and justifying the cost, because the number of interactions will enable a prediction of the word-of-mouth reach and the long-term return on investment (LROI).

Finally, to finish off the recipe, you should write a paragraph that summarizes what the outcome of these steps will be. For example:

By participating in the 106.9 Radio Experience, the target audience of alternative music fans will feel satisfied after enjoying the process of compiling their own customized CDs. They will be pleased to receive the goody bag, whose contents will act as memorabilia for their positive brand experience.

This stage is equivalent to answering questions like ‘And why is this happening, again?’ or ‘Remind me, what will this achieve?’ Your response is the same as it would have been, except for the fact that you’re still wearing a consumer hat, rather than a marketing hat. By placing yourself in the shoes of the consumer, you maintain an objective outlook, with your number one priority being the participant experience. With this approach, you will be more likely to spot any flaws in the plan or story.

When you think of a cake recipe, it starts with the ingredients, then it lists the method, then it clarifies the desired outcome. By following the recipe formula in the introduction of the action part of your SET MESSAGE plan, you will crystallize the experience story, ensuring ultimate clarity.

2. Budgets

The next part of the plan is the all-important budget. Obviously, there will be two budgets; one is the internal (agency) budget and the other is the external (client) budget. The internal budget should state the maximum amount that everything should cost the agency. This will be used for agency purposes only, and will allow the project management, or activation team, to adhere to clear guidelines on how much they can spend. This part may also elaborate on certain internal costs that are not to be passed on to the client (to provide added value), such as staff incentives or any anticipated increase in overheads (such as large calling or texting volumes, etc).

The client budget will be presented to the client and should already include agency mark-ups, margins and fees. If a traditional agency is outsourcing to an experiential marketing agency, then partner agency commissions will need to be built in (by either party, depending on their policies). There are certain broad generic cost categories that can be looked to for structure when considering all possible costs of experiential marketing. These categories are as follows for a live brand experience channel.

Production

- set/branded roadshow vehicles/audio and lighting or other equipment and wiring;
- merchandise (goodies, gifts, vouchers, giveaways, flyers, etc);
- uniforms.

Staff costs

- front-of-house team;
- Brand ambassadors;
- speciality staff;
- event managers;
- team leaders.

Behind-the-scenes crew

- riggers and production crew;
- photographers/videographers;
- drivers.

Face-to-face training

- venue hire;
- staff (payment for their time and expenses for attending);
- refreshments and snacks;
- equipment (PA/projector, etc);
- training session administrators (may be agency staff);
- assistants (meet and greet, registration, etc);
- campaign manuals/other printing or documentation.

Remote training

- webinars;
- staff (payment for participation – less than face to face);
- teleconferencing;
- automated quizzes and surveys.

Logistics and transport

- vehicle hire;
- petrol (calculate as cost-per-mile × estimated mileage);
- parking;
- travel time (calculate by mileage).

Stock control

- storage/warehousing (calculated by space, remembering that storage will be required for promotional merchandise, sample stock, the set, vehicles, and uniforms – possibly in several locations, either simultaneously or consecutively);
- couriers (to deliver stock to the team and crew, either hired directly by the experiential marketing agency or outsourced to a courier company such as UPS);
- temperature control (refrigeration or freezing when and if the campaign involves samples of food, drink, ice-cream, etc).

Space hire

- venue/space-owner hire fees;
- intermediary fees if applicable (if space is booked through a specialist broker or agent);
- administration, for the time and service of the completion of space hire-related paperwork (such as set maps and dimensions, risk assessment, portable appliance testing, fire safety documents, method statements, hire forms, contracts, health and safety certificates, criminal record bureau checks, public liability insurance, etc).

Staff/crew expenses

- travel fares/petrol;
- travel time;
- phone (for event managers and other managerial activation team members);
- hotel (when travelling);
- food (when travelling);
- parking (for team and crew members).

The amplification channels

The cost sections below can vary greatly depending on whether they are implemented by the experiential marketing agency, outsourced to third parties, or executed in collaboration with the client's existing agencies:

- ads (used before experience to drive participants and generate awareness);
- broadcast media slots, live or recorded (to expand the reach of the experience);
- PR prior to live date (to drive participants and generate awareness);

- PR at or post the campaign (to expand the reach of the experience and create interest);
- digital (to generate pre- and post-campaign interest or to broadcast the experience, live or otherwise);
- buzz, word-of-mouth or word-of-web (whispering campaigns, either online or offline, deigned to create an interest prior to the experience, and drive traffic).

Management

This cost category is usually presented as one item and calculated as a percentage of totals, or by the estimate of time that will be spent, plus expenses:

- research and idea testing;
- planning;
- activation management;
- evaluation.

Reporting

- technology (PDAs, web surveys, telephone surveys, etc);
- campaign audit (an audit, either internal or by an external research agency, to measure outputs using the systems and mechanisms for measurement);
- administration (updating online client access pages, data entry, etc);
- visual reports (editing of video footage and preparing presentations).

While building (transparently or not), contingencies should equal around 5 per cent of the campaign total; and agency commissions, usually between 10 and 25 per cent depending on the number of partner agencies.

The budget should be prepared in a spreadsheet and is usually broken down to include unit costs, descriptions, quantities, duration of time, and totals. Table 12.1 is a sample bolt-on budget, which is designed to show what a small budget presented to a client could look like. This budget relates specifically to the costs of booking additional elements (staff and extra venues) as an add-on to an existing live brand experience for a brand of juice.

It is widely accepted that some of the categories listed are not applicable across every experiential marketing campaign, and there will doubtless be unaccountable elements that will arise in specific situations. The most important thing when budgeting is to include contingencies

Table 12.1 Sample budget

Additional budget 'Juice April 2'		NOTE: This budget is for additional items as requested by client 'Fresh Juice' to supplement existing April budget				
Staff costs						
Item	Description	Unit cost	#	Days	Total	
Brand ambassador	Will activate the interactive juice game + engage consumers	£119	4	12	£5,712	
Event manager	Will manage team, take photos, and feedback data	£213	1	7	£1,491	
Event manager (on travelling days)	Will manage team, take photos, and feedback data	£213	1	5	£1,065	
Total					£8,268	
Transport						
Item	Description	Unit cost	#	Days	Total	
Travel expenses when travelling	Plane ticket return to Town x	£80	1	1	£80	
Travel expenses when inside local area	To and from event 1	£20	1	5	£26	
Parking	Parking budget for van to park outside locations for the day	£20	1	12	£240	
Food	Food budget per day for event manager	£30	1	7	£210	
Hotel	Hotel for event manager	£80	1	7	£560	
Total					£1,116	
Space hire						
Item	Description	Unit cost	#	Days	Total	
Event 1 space hire	Space hire 4mx4m	£5,500	1	7	£5,500	
Event 2 space hire	Space hire 4mx3m + additional branding	£5,940	1	5	£5,940	
Total					£11,440	
Client totals						
Subtotal		£20,824				
10% mgmt fee		£2,082.40				
Grand total		£22,906.40				

and to remember to think about each and every cost, however small. Sometimes, clients who are used to planning only media campaigns or more predictable forms of marketing, will find it hard to accept that their experiential marketing agency is billing them for contingencies. Therefore, it is not uncommon for experiential marketing agencies to build a contingency margin of around 5 per cent into all the unit costs rather than itemizing it as an independent cost category.

Whichever way a contingency is built into a campaign budget, it is crucial that it is not neglected, because to successfully and flawlessly activate an experiential marketing campaign including a live brand experience, an attitude of predicting potential problems and preparing contingency solutions in advance is vital. An 'It'll be alright on the night' attitude is the worst approach to this stage in your planning.

At the end of the budget, a proposed payment schedule should be detailed. This usually would require several upfront costs to be paid to

the agency in advance, with ongoing or running costs paid at regular intervals or immediately after the campaign. Sometimes, clients buying experiential marketing services for the first time may have unrealistic expectations about payment terms, such as a desire to receive 100 per cent credit until up to 30–45 days after the campaign ends. This is not because they are crazy or wish to exploit their agency, but they simply require some additional knowledge and understanding. This is why it is important for their agency to explain to them that there are many upfront set-up costs involved in live brand experiences, which is something that everyone can appreciate. Clearly no client would expect their experiential marketing agency to provide them with a loan, which is exactly what they would be doing if they agreed to payment terms akin to those that are commonplace when buying some traditional media.

3. *Project plans*

The project plans should include a combination of both the top-line and detailed blueprints that will guide the project management team in their step-by-step preparation and implementation of the campaign. Remember, ‘If you fail to plan, you plan to fail.’ This could not be closer to the truth in the case of detailed live brand experience project plans.

When there is a short timescale involved, some say they do not have time to plan carefully, but they might as well not take on the project in the first place if that is the case. If you are a client considering live brand experiences, keep in mind that though an agency may accept a short lead time, the more time that you allow them for careful project planning, the better the execution will be.

The project plan section should include the following elements (or equivalents): WBS, a Gantt chart, a critical path analysis, a schedule, a risk analysis, checklists (for staffing, production and logistics) and an external analysis (PESTEL ‘Problem and solution’ table).

The work breakdown structure

Start by creating a work breakdown structure (WBS) for the project. A WBS is an important element that you will need to develop your Action plan. It lists all of the categories and sub-elements that you will use to achieve and deliver the project. A tree structure of Post-it Notes can be a great help in developing your WBS.

Gantt chart

The Gantt chart is a table; a simple example is shown in Table 12.2. The first column features task categories with each individual small-detailed

task appearing in the rows under each category header. These will be extracted straight from the WBS. The Gantt chart organizes the items on the work breakdown structure against a timeline. The titles across each column are dates, months or weeks. After creating this table, the next step is colour coding each person who is part of the project activation team. Then, simply highlight each square of the table in a colour that is affiliated with the individual due to complete it, as well as the number of hours required for its completion.

According to the PMBOK Guide,¹ it is absolutely crucial that you include ‘100 per cent of the work defined by the project scope and

Table 12.2 Sample GANTT chart

	Sandra	Bob	Lisa	Matt	Galila	Ramez
21–26th 07/09						
PRODUCTION						
Complete set build	██████████					
Take client to visit set		██████████				
Make any changes			██████████			
Conduct safety testing					██████████	
Deconstruct the set for transport						██████████
SPACE HIRE						
Finalize rate negotiations	██████████					
Complete paperwork		██████████				
Pay deposit			██████████			
Sign contract				██████████		
Review site maps						██████████
STAFFING						
Check availability of relevant people	██████████					
Shortlist staff		██████████				
Send shortlist to client			██████████			
Receive input/preferences from client				██████████		
Book the selected staff				██████████		
Book reserves and backups					██████████	
Send briefs, manuals and contracts						██████████
TRAINING						
Provide venue options to client						
Book selected venue						
Create agenda for training						
Ensure appropriate equipment is in place						
Create training presentation						
LOGISTICS						
Package kits for each staff member					██████████	
Arrange kits to be couriered to staff						██████████
Ensure staff have received packages						██████████
Hire a lorry		██████████				
Hire a van			██████████			
Plan route for event manager and driver					██████████	

capture all deliverables – internal, external, and interim – in terms of the work to be completed, including project management’. The best way to define tasks is to state the deliverable outcome or result, rather than the actions required to achieve that outcome, ensuring that defined outcomes are bite-sized, and not too broad. It is also important to remember not to allow any overlap between tasks, as this causes confusion and potentially repeated work. The total number of hours in each colour will indicate the estimated workload of each member of the project team. This will allow the manager to assess whether the tasks they have allocated to each individual are feasible. Again, a time-based contingency will need to be applied, which should be around 10 per cent of total project hours.

Critical path analysis

A critical path analysis is also a great way to manage the project activation milestones. It maps milestones onto a timeline, and then an arrow starting from a milestone branches off to show tasks that cannot start until that milestone is complete. The relationships between interdependent tasks and task categories are therefore clearly defined. This process helps to ensure that a project, in this case a live brand experience, can be delivered on time. Many different project management programmes are available, allowing the easy creation of a critical path analysis and Gantt chart.

Figure 12.1 shows a sample critical path analysis. It was set up to manage the timeline of a staff booker who was booking some Brand ambassadors and an event manager for a live brand experience at short notice.

The project manager who leads the activation team will now be able to closely monitor progress and identify any potential consequences for other deliverables following a delay in the completion of an individual task. If the individual task is interlinked with other tasks that depend on the completion of the original task, then it is crucial that it is achieved on time.

As per Figure 12.1, if the staff booker delayed steps 7 or 9 (confirming that shortlisted applicants are still available), then he or she wouldn't be able to send the shortlist to the client. If he or she did send the shortlist to the client without ensuring that all the people on it were available, and the client chose someone who was in fact unavailable, then the client would be disappointed.

Schedules

A schedule in calendar format is an essential part of the project plan; see the example in Figure 12.2. It is quite an obvious and basic tool, but

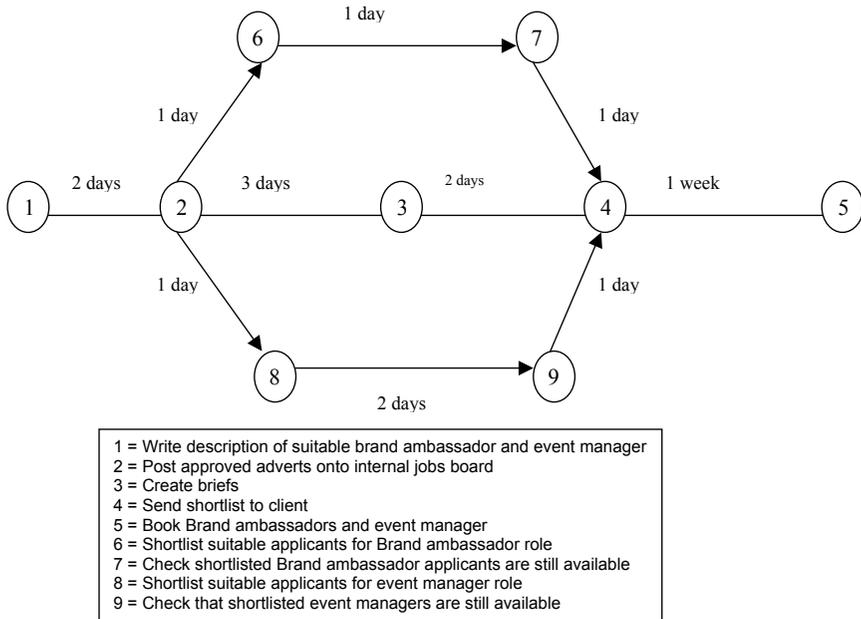


Figure 12.1 Sample critical path analysis

without one an activation team or client could feel lost. The schedule should map out which parts of the experiential marketing campaign are happening on certain dates, at certain locations. The agency that is responsible for activating the campaign, and the client, should put the campaign schedules up on a wall or somewhere visible, for easy reference.

Risk analysis

Arguably one of the most important parts of the project plan is the risk analysis. With live brand experiences, many factors contribute to the success of each and every element of the campaign. If one cog in the campaign wheel is missing or jeopardized, then it is highly probable that a chain of undesirable events will occur.

For example, Frank was the account handler at an experiential marketing agency. He didn't have much on, so when he was approached by a client to run a live brand experience roadshow for a sports channel on TV at short notice, he quickly took it on board. The sports channel usually advertised on television and it was the first time that it was running a live brand experience tour, hence the fact that it expected it

Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun
27 April	28	29	30	1 May	2
					3
4	5	6	7	8	9
FRUIT JUICE CAMPAIGN AT EVENT 1	FRUIT JUICE CAMPAIGN AT EVENT 1	FRUIT JUICE CAMPAIGN AT EVENT 1	FRUIT JUICE CAMPAIGN AT FESTIVAL		10
11	12	13	14	15	16
			FRUIT JUICE CAMPAIGN AT EVENT 2	FRUIT JUICE CAMPAIGN AT EVENT 2	17
18	19	20	21	22	23
FRUIT JUICE CAMPAIGN AT MALL 1	FRUIT JUICE CAMPAIGN AT MALL 1	FRUIT JUICE CAMPAIGN AT MALL 1			
					24
					FRUIT JUICE CAMPAIGN AT MALL 1
25	26	27	28	29	30
		FRUIT JUICE CAMPAIGN AT BEACH	FRUIT JUICE CAMPAIGN AT BEACH		31

Figure 12.2 Example of a schedule

to be turned around in under two weeks’ planning. The concept, which was designed by the TV channel’s PR agency, involved a giant-sized interactive ‘spot the ball’ game, featuring a large set that looked like a real football pitch with grass and a goal. The live brand experience was scheduled to tour around many different shopping malls, for one day at each mall.

There was a short lead-time for the campaign, and some things in the Action planning were rushed. As a result, an inexperienced driver was mistakenly hired without reference checks. He filled the van that was transporting the set with petrol instead of diesel. The van broke down late on a Friday evening, with the campaign due to be live in another city the following morning. As a result, every step of the plan, scheduled to occur directly after he picked up the set with the van, was considerably delayed. Consequently, the live brand experience was a disaster and the client was devastated. All the Brand ambassadors, event managers, venues, suppliers and the experiential marketing agency suffered too, both financially and emotionally.

The reason that the inexperienced driver was hired in the first place was that the original driver had existing commitments with his church

that Sunday. When he had been booked for the campaign, he was unaware that he would not be able to return in time for his commitments. This confusion was due to lack of proper communication from Jane (the staff booker) and the driver. When he cancelled at short notice, Jane panicked because there was no back-up plan, and no contingency in place. This left Jane desperate, and so she sacrificed the quality of the replacement driver to try and lessen the impact of her original communication error by rebooking the position as quickly as possible.

Sometimes these types of problems can occur without anyone being at fault, and without communication errors. The moral of this story is that it is the project manager's responsibility to carefully conduct a risk analysis during the Action planning stages, and then ensure that each team member (such as a staff booker) has appropriate contingencies in place early on. Something will always go wrong and someone will usually let you down, even if it is due to a genuine emergency, a weather issue or a legal factor. No client is interested when their agency's driver has existing commitments to his church, or that a team leader's grandmother has died, or that their experiential set was not waterproof when it rained, because their branding, and potentially their campaign, is in jeopardy. Therefore, the only way to ensure flawless execution and client satisfaction is to check well in advance that all bases are covered, and that contingencies are in place at no additional cost.

By conducting a risk analysis through a lengthy brainstorm between the activation team, and then filling in a risk analysis form, some of these types of things may still happen, but there will be an effective solution, ready and on standby. In addition, many potential problems can be predicted with some careful thought and lots of experience. This process will shape the strategic creation of many elements of the campaign, aiming to prevent unnecessary problems and risks from occurring. The risk analysis form in Table 12.3 factors in both the likelihood and the impact that a problem can have, therefore showing the risk score. Risks with higher scores will need to be prioritized, though all risks will require a contingency plan and a person who is accountable and responsible for that contingency.

The form was completed for a live brand experience for a brand of designer clothing. The campaign, featuring an interactive catwalk and models, was positioned outside 18 fashion stores and had the experiential objectives of bringing the clothing brand to life, driving footfall into the retail store and thereby increasing sales. Once each contingency element has been allocated to an activation team member, their responsibilities will need to be added to the campaigns' Gantt chart and critical path analysis.

Table 12.3 Risk analysis form

Likelihood and Impact: High = 3, Medium = 2, Low = 1					
Nature of risk or uncertainty	Likelihood high/ medium/ low	Impact high/ medium/ low	Likelihood × impact [score]	Contingency required and who will take responsibility to manage the risk and backup plan	
Rain	3	3	9	Order branded umbrellas or a canopy (Sam)	
Vehicle breakdown	1	3	3	Have the vehicle checked out thoroughly prior to the campaign (Robert)	
Staff 'no shows'	3	3	9	Ensure that reserves are at the location, and the back-ups are on standby (Christina)	
Staff lateness	3	2	6	Book the staff to be at location 1 hour prior to campaign start time (Christina)	
Low footfall on the street outside the shops	1	3	3	Ask the client for the footfall data of each store to ensure there is a benchmark point (Matt)	
Uniforms not fitting	2	3	6	Order spare uniforms in every size (Sam)	
Running out of merchandise	1	3	3	Ensure that there is 50% more merchandise than anticipated distribution estimates (Sam)	
Client not liking the appearance of the set	1	3	3	Build in enough time for the client to view the set and potentially suggest changes prior to the campaign going live (Matt)	
Event Manager mobile phone out of battery	3	2	6	Provide the event manager with two spare batteries (Christina)	
Traffic on the route to location	3	2	6	Ensure that the Event Manager and driver arrive 1 to 2 hours early to allow for traffic (Christina)	
Store managers not fully understanding when/if the campaign is happening	3	2	6	Ask the client for permission to contact store managers directly to liaise and ensure they are 'in the loop' (Matt)	

Checklists

Checklists are a great way of managing small daily tasks. A good project manager should ensure that every team member is working from a comprehensive checklist that includes every task allocated to them on the Gantt chart. Each day, or week, the checklist should be handed in to the project manager for review, and the completed tasks should be ‘scratched out’ or changed colour (to the colour that represents a completed task) on the Gantt chart. It is advisable to create a checklist template for each team member, containing tasks that reoccur with the majority of live brand experiences, then add to it and adapt it on a campaign-by-campaign basis.

External analysis: PESTEL factors

PESTEL stands for Political, Economic, Social, Technological, Environmental and Legal analysis, and describes a framework of macro-environmental factors. This acronym is usually used for a different purpose early on in marketing planning, but it lends itself very nicely to this stage of the project plan. At the end of the action part of SET MESSAGE it is important to state any legal, social (this includes health and safety, employment, public liability and insurance), environmental, economic and technological issues, and precautions for any such factors that the client or stakeholders should be aware of (including how these issues are addressed and covered). This external analysis should be formatted as a ‘potential PESTEL problem and solution’ table; an example is shown in Table 12.4.

Table 12.4 PESTEL problem and solution

Potential PESTEL problem	Solution
Environmental problem: Unwanted environmental waste	● Build in a ‘litter pick’ at the end of each day
Social problem: Noise pollution and disturbance of local residents	● Ask residents’ permission before holding a music-based experiential event in a nearby park
Legal problem: Injury of small children	● Ensure that the set is appropriately designed for small children and made from soft materials with no hard corners or edges. Also have a health and safety officer present

The external analysis is the final part of the project plans within the Action stage in SET MESSAGE.

4. Communication and collaboration

After the project plans, the communication and collaboration plan comes next. One of the most important rules in successful activation is not forgetting to plan the communication methods and review points between the agency, client and stakeholders into the action stage. Include, in the Action part of SET MESSAGE, a clear outline of when and where client/agency meetings will occur and how information will be passed between relevant parties, and ensure that everything that is agreed is confirmed in writing or by e-mail to avoid people forgetting or being confused about what they, or others, did and didn't agree to.

Part of good communication is the ability to share information and documents with ease. There are many ways to enable this, both within an agency activation team and between the activation team and the client. There are plenty of open-source file-sharing applications available, such as Google's web-based file-sharing application. Alternatively, remote networking can also be a good approach. Rather than constantly e-mailing revised spreadsheets and risking the chance that someone will still be working from a wrong version, work on one collaborative spreadsheet online. If you can create a system that enables seamless communication and easy access to current versions of plans and documents, then the chances of communication problems occurring will be minimized.

5. Suppliers and third parties

Suppliers are a key part of the success of a campaign. Even if you are a client outsourcing to a specialist experiential marketing agency, it is likely that not every single part of the campaign will be managed by the agency in-house. Even fully integrated experiential marketing agencies will still outsource some things, for example venue, space hire, props, uniforms and merchandise printing.

It is good to know that you can trust the suppliers involved in your live brand experience, and it is worth checking their references and making sure the agency that appoints them involves the client in the process. From an agency perspective, when planning the outsourced elements of a campaign, there are eight key steps to the process. These should be addressed in this part of the plan:

1. Identify the different types of suppliers you will need and your exact requirements.
2. Consider if you want to outsource to a company that will manage big chunks or small elements (for example, hiring one company for the truck and another company for the branding on the truck).
3. Identify two or three existing suppliers that you could potentially appoint each outsourced element to, and score the anticipated pros and cons, based on past experience, of outsourcing to each one.
4. Send highly detailed briefs that specify the exact requirement, the budget and the deadline for production, as well as the preferred format and deadline for bids and proposals.
5. Carefully evaluate each supplier's bid and proposal, checking references and considering both the anticipated pros and cons, and scoring the pros and cons of each proposal.
6. Appoint a main supplier for each element and appoint a second supplier to be on standby for each element, in case you are let down or unhappy with the result and need to change supplier.
7. Allow enough time for unexpected delays, for switching suppliers if necessary, or for requesting changes to anything that is unsatisfactory.
8. Ensure that you have everything that is agreed in writing, and that the payment schedule with the supplier fits within the payment schedule agreed with the client.

6. Approvals schedule

In this stage of the plan, there should be a clear approvals schedule stating dates and deadlines for approvals that the client needs to make. It is important to any brand that the client has the opportunity to approve anything that goes to print with their logo, or approve any experiential set or individual that represents the brand. To avoid any delays in the approvals process, clients should request any artwork components in the correct resolutions and formats from their creative agency well in advance and at the beginning of the planning process. The agency needs to be very clear about when they will be sending proofs or samples, or when the client can visit the set. That way, the client can inform any relevant stakeholders or decision makers that they will need to be available for approval on certain days. Also, the agency will not be stressed by worries that the schedule will be thrown off track due to the client not approving things on time or not providing the relevant artwork components. Time should also be factored in for the client not approving something and wanting it changed. Some things

that will need client approval are:

- branded vehicles;
- branded merchandise or giveaways;
- branded uniforms;
- the set;
- the experience team (Brand ambassadors, speciality staff, team leaders, event managers);
- the space hire locations;
- competition prizes;
- a micro-site and any other online elements;
- any ads, press releases or amplification elements;
- the briefs given to the experience team;
- the training (the approach, venue, presentation and agenda);
- anything else that features the client's brand.

Another thing that should be considered in the approvals schedule is that some of the printing may be in a much larger format than the client is used to, and therefore the clients' creative agency may require additional time for reformatting. For example, a giant logo that needs to be printed onto vinyl to wrap a 40-foot trailer is not something that will necessarily already be on file. In addition, sometimes there will be elements that need to be approved by external or third parties, such as any partner logos or space hire applications. These third-party approvals should also be factored into the timeline, as always, allowing for contingencies.

It is crucial to include notes on this schedule that clearly describe any negative implications of any delays. This timeline can alternatively be formatted as a critical path analysis.

Summary

In summary, the Action part of SET MESSAGE is of ultimate importance because there is no point in creating the most innovative and revolutionary experiential strategy, or in booking the highest footfall venues or designing the best amplification plan for the live brand experience, if the execution is going to be flawed. The statement 'If you fail to plan, you plan to fail' is most apt at this stage, and is something that nobody would choose to learn the hard way.

If the Action part of your SET MESSAGE plan contains a recipe, budgets, project plans (WBS, Gantt chart, critical path analysis, schedules,

risk analysis, checklists and external analysis), a communication and collaboration plan, a suppliers and third-parties plan and an approvals schedule, then you have covered all the bases. Your SET MESSAGE plan is almost ready for activation, with only the Gauging effectiveness and Evaluation stages to come.

Note

1. Project Management Institute (2004) *A Guide to the Project Management Body of Knowledge*, PMBOK Guides, Project Management Institute, Newtown Square, PA