

[performance]

marketing communications case history

Modularized literature program and Web-based training drive preferred marketing methods for Randall & Dewey Partners, LP

procedures development

marketing communications

strategic competency programs

curriculum development

employee communications

training development processes and software

behavioral safety analysis software and safety communications programs

Effective marketing for a rapidly evolving enterprise

As part of a comprehensive identity and branding program for Randall & Dewey Partners, LP, Daniel Follette, Inc. developed a modular literature program to accommodate communications to a wide range of markets and to simplify changes to messaging as the company evolved.

At the outset of the engagement, the following became very clear:

- anticipated changes and new lines of business would rapidly date any literature
- executive management wanted more client-focused communications
- existing presentation formats worked against the identity the company was trying to build
- existing presentations were difficult to read
- each presentation was built from scratch, usually under severe deadline pressures

The modular program provided immediate benefits

- literature cost savings—modularization eliminated investment in materials that would become rapidly dated.
- less time and expense in updating messaging—modularizing meant that only those parts of the message affected by changes would have to be modified
- simplified literature and proposal assembly—most packages could be assembled from individual, off-the-shelf modules; authoring was limited to prospect-specific content and was guided by templates and detailed instructions.

Teasing apart proposal content and building the message components

By teasing apart existing presentations and interviewing executives, developers were able to identify and hone individual message components.

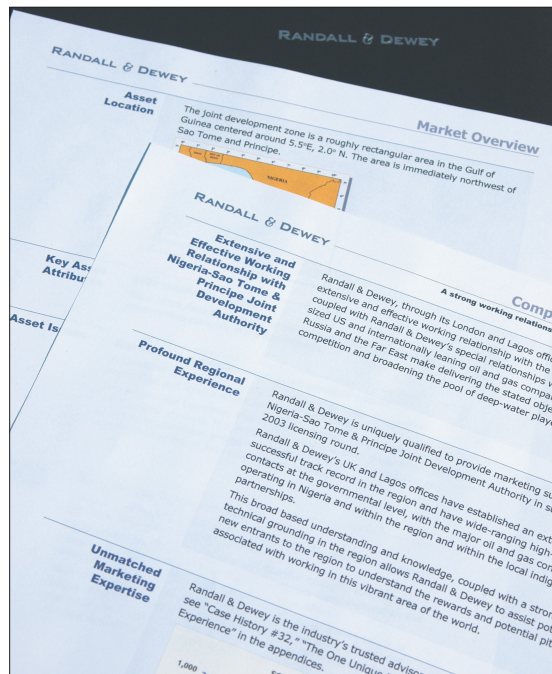
Most components were packaged as so-called *static documents* — single-sheet descriptions of product lines, service features, case histories and biographies.

Proposals incorporated a combination of static documents and client-specific elements in pages called *dynamic documents*.

Proposal packaging was designed to provide multiple levels of formality.

Building a model document structure for simpler development and better results

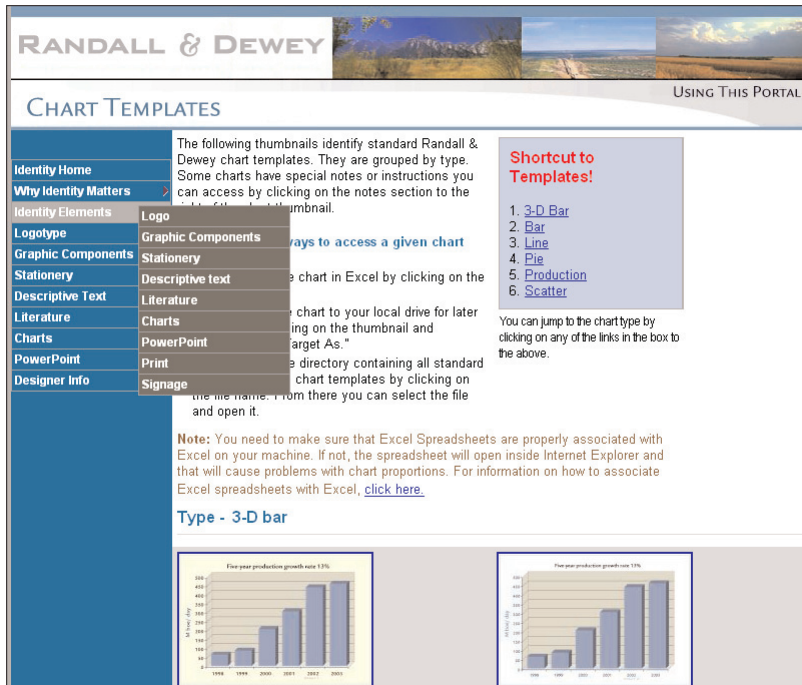
Disassembly of representative presentations also enabled developers to recommend a model proposal structure. The structure strongly encouraged authors to direct content toward client objectives and served as a template to simplify development. A Web-based guide provided instructions and single-click access to templates (see illustration on following page).



Detail from Word template specifications

**DANIEL
FOLLETTE**

Inc.



Representative page from Web-based guide

Building meeting dialogue supported by detailed leave-behind documents

The use of PowerPoint for proposal development had become a critical limitation. Intelligent meeting dialogue was one of Randall & Dewey's most persuasive sales tools. And as many communications authorities have pointed out, the use of PowerPoint presentations does not promote dialogue.

In addition, PowerPoint presentations must restrict content to be viewable or readable. This meant that follow-on readers, who were often the final decision makers, received only a digest of meeting content.

Daniel Follette, Inc. recommended the following proposal development and presentation technique:

- build a comprehensive proposal document using the model document structure
- digest the document down to a one-page agenda or executive summary to guide dialogue
- for larger groups, summarize the document in two or three PowerPoint slides for projection
- focus on face-to-face dialogue in meetings, not documents
- distribute documents when the meeting concludes, or to reference specific detailed information

Improving document navigation and appearance through multiple levels of summarization

Long linear proposals are difficult to read. For that reason, both the proposal structure and the layout of individual pages were designed with several levels of summarization. This permitted readers to scan documents, dig deeper in a section or read in detail. Executive summaries provided single-page overviews.

Making a stronger case for competency

Previous proposals wove claims and examples throughout the presentation in an attempt to demonstrate competency. This had the opposite effect because Randall & Dewey became the focus of the document; and because that content interrupted the flow of the presentation. The problem was exacerbated by the linear structure of PowerPoint presentations.

The new proposal structure made a stronger case for competency by demonstrating it through analysis of client needs. The new proposal structure begins with a clear restatement of a client's objectives, a commentary on issues surrounding the engagement, relevant market intelligence and a summary of the recommended project strategy.

A Competency Summary section farther into the proposal provides a high-level description of company abilities relevant to the specific engagement and references supporting detail that is subordinated to appendices. This enables Randall and Dewey to make a clearer, stronger competency case and avoid message dilution by intrusive detail.

Templates and techniques to improve appearance and stability of Excel charts

Presentations generally included charted data, usually from Excel. Daniel Follette, Inc. developed custom templates that were consistent with Randall & Dewey's identity. The company also provided Visual Basic plug-in modules to automate chart formatting.

Inconsistent chart behavior had been an ongoing problem for Randall & Dewey proposal developers. Daniel Follette, Inc. researched the problems and provided a chart-handling procedure to stabilize chart behavior.

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