2021 MESSAGING GUIDELINES TEMPLATE

BACKGROUND

WHAT IS IT?

- A template to make sure all your communications (messaging, storytelling, etc.) are well aligned and being used in their optimal ways
- It forces you to explore what your brand truly stands for and identify the best ways to communicate that with your employees, audience and stakeholders
- It is a systematic approach to defining key criteria needed to implement any kind of marketing strategy or communication plan/activity

TIP: These documents should be revisited at least once a year for updates and changes. The world, your brand and your audience are constantly changing and so, your messaging must change as well. Do not reinvent the wheel, just revisit and refresh it.

WHY YOU MUST HAVE ONE?

- To identify any gaps in messaging or content opportunities
- To provide a framework for all internal resources to use, to ensure brand consistency across all platforms and activity
- Because you can’t improve, if you don’t have something to improve on. This document will get you started.
- Feeds directly into other components or aspects of a marketing plan and MUST be in alignment
- Helps avoid last minute scrambles or “writers block” by having a guide in place to always get you started or even be proactive
- Essential to working with any outside partners or contractors – will serve as the bridge between internal and external creative resources

MYTHS

- I need a unique message for every channel and every audience
- I MUST strictly follow ever rule and guideline I outline
- The responsibility for development and usage of this document falls on one person
- I can get by “winging” it and seem to do just fine without so much structure
- I need to be a Creative (capital C) and not just creative, in order to do one
I can put one together without an honest deep dive into my brand and audience

THE 3 COMPONENTS TO A STRONG MESSAGING STRATEGY

THE ENVIRONMENT
- What type of messaging do your competitors currently use?
- Is there any messaging overly used in your space you should avoid? Any messaging being underutilized you can capitalize on?
- Is there specific industry language or other factors your audience would expect or at least understand that a normal audience would not?
- Are there any major shifts or trends in your industry that you should factor into your messaging?
- What challenges do you face in your space that could be mitigated or reduced via strategic messaging?
- What brands inspire you from outside of your direct industry (aspirational brands)?
- What brands are doing it well? Why?
- What brand’s approach do you strongly disagree with or not relate to? Why?

TIP: “Spy” on your competitors’ or aspirational brands’ ads via Facebook (transparency advertiser tool), Google Search (type keywords relevant to your brand and see what ads are showing up/saying), MOAT (free tool for viewing any brand’s display ads), and more.

TIP: Sign up for your competitors’ or aspirational brands’ newsletters/email list

TIP: Sign up for Google News Alerts relevant to your organization and audience to easily stay on top of the latest news and trends

TIP: Be Cautious with using too much insider language or industry/technical jargon as the right amount provides credibility but too much can backfire and turn people off

TIP: Just because another brand says what you say, does not mean you cannot say it, or cannot still be unique. It is about who “owns” it, not who says it. If you can better practice what you preach, you will leave them in the rearview mirror.

THE AUDIENCE
- Who is your Primary Audience?
  o Secondary Audience?
    o Tertiary Audience (if applicable?)
- Do you have further segmentation opportunities within your audiences?
- Is there specific messaging you could use to speak to increase relevance with a segment?
- What are their biggest challenges, concerns or problems?
- What features/benefits that you provide are ideal solutions to your audience’s problems?
- What emotions do they seek out from brands? From your brand specifically?
- What do they believe in, your organization also believes in (shared belief)?
• What does your audience seek to get from communicating with your organization or similar organizations in your space?
• What are some interests or affinities not causally related to your organization your audience cares about? Are there any overlaps or relation to what your organization does?

TIP: Try to find the most core belief your organization has (aka its purpose) and map that to a belief you feel your audience also shares. Then go after that audience. The best and strongest relationships are built on top of those shared beliefs.

TIP: Segmentation (breaking your audience into smaller groups by specific criteria) can be extremely helpful for catering specific messages to specific people but if your segments become too small or niche the payoff may not be worth the price.

TIP: When in doubt always use the mantra of “audience first”. If you make everything you do, at some level, for the sake of your audience, then it will be hard for them not to reward you.

TIP: When able, try to move “beyond demographics”. Gender, Age, and Household income, does matter, but you will really win when you can label or categorize your audience by deeper more personal and emotional characteristics.

THE BRAND

• What is the one Key Takeaway your audience should know about you (1 short sentence or phrase)?
  ○ This should be written as a confident but easy to understand statement you can rally behind or even put up on a wall
• What are your supporting points to back up your Key Takeaway? How are you able to make the Statement true?
• How do you further describe what your brand offers (value) and relate it back to your Key Takeaway and supporting points?
• What personality or tone should you use as the foundation for your messaging? What are some alternate options for use in specific scenarios (i.e., unique audience or specific channel)?

TIP: Test out your 1 short sentence/phrase on someone that has no idea what you or your organization do. Try to test it on someone that works in marketing. Test it on a coworker. Get as many different reactions as possible. When your version “satisfies” majority of the people in that group, you will know you are on the right track.

TIP: If you cannot quickly and easily backup your Key Takeaway then its most likely not the most “key” one. Your best version should connect with things your organization has woven into its DNA in terms of why it does the things it does.
TIP: Define the most core version of these things but have the flexibility to use different variations (i.e., length or detail level) in different places. What works as the headline of an ad may not work the same as the first statement on your about page. But everything you do should still relate, and tie back to that “why”.

COMMUNICATING ACROSS 4 KEY PHASES OF THE CUSTOMER JOURNEY

MESSAGING

1. Awareness (your goal) and Discovery (audience stage)
   - What is your best message/offer to grab someone’s attention and get on their radar?
   - What is the optimal message for being someone’s introduction point to your brand?
   - What are some ways through our messaging we can tease them to want more?
   - What are your best Calls-to-Action for this stage (i.e., Learn More)?

TIP: Less is almost always more at this stage. They will not read a lot of text. They will not scroll far down. They will not watch a long video. Hit them early, clearly, and then let them move on.

TIP: This stage is a great opportunity for testing. See what messages do best for pulling in different audiences. If you have three strong feature/benefits, try messaging options with each of the three as the leading call out and see how they perform.

2. Consideration (your goal) and Evaluation (audience stage)
   - What messaging would help you stand out against your competitors?
   - What messaging is best suited to mitigating common audience challenges/problems?
   - What messaging pays off the true benefit of interacting with your brand?
   - What messaging will ensure the audience will keep you in their “consideration set”? 
   - What are your best Calls-to-Action for this stage (i.e., Find Out How)?

TIP: This stage should be all about the audience (like most stages). However, here is where you will need to start to bridge the gap between what the audience wants and what you provide. Try to find subtle ways to connect those dots (or more overt ones if needed).

TIP: Try to pre-qualify by proactively addressing any weaknesses you know you have or making sure to really highlight your unique strengths. Most people only associate a couple things with a brand early on so make sure they form the right ones.

3. Transaction (your goal) and Decision (audience stage)
   - What messaging can drive home a sense of “urgency”
- What are some final offers, value adds, incentives you can use to push them over the edge in terms of taking action?
- What are some messaging you can use to instill a sense of trust and confidence in your brand?
- What are your best Calls-to-Action for this stage (i.e., BUY NOW!)?

**TIP:** While a “hard sell” is not usually the best route, this is one stage where you should consider playing out any fears, doubts, and concerns, the audience might have. Making a decision is difficult and emotional. You will need to capitalize on that.

**TIP:** Do not be overly pushy or aggressive or it will backfire on you, instead be persistent and confident (but it is a fine line).

4. Retention/Loyalty (your goal) and Repeat (audience stage)
- What are some messaging considerations when speaking to a familiar audience?
- What ways can you evolve or advance your messaging for someone who is already moved through it before?
- What are some ways you can use messaging to stay top of mind with an audience even after they have completed their “goals”?
- What are some messaging considerations for inspiring the audience to share with or refer new audience members?
- What are your best Calls-to-Action for this stage (i.e., Stay In The Know)?

**TIP:** Of all the stages, this one can best leverage the idea that they are a familiar audience and you are a familiar brand. You can be more casual, personal and direct with your messaging.

**TIP:** When in doubt, do not be afraid to ask. They have already interacted with you and for good reason. Most people want to help the brands they like, so let them. If you need them to share or respond, make sure they know it.

**CONTENT**

1. Awareness (your goal) and Discovery (audience stage)
   - What types of content are effective for introducing our Brand?
   - What types of content can we use to stand out in a cluttered space?
   - What types of content will leave the audience “seeking more”?
   - How much content is needed until were officially on someone’s radar?

**TIP:** Keep majority of your content at this stage “snackable”. Able to be easily found, easily interacted with, and without much of a commitment.

**TIP:** High impact visuals, videos, bright colors, catchy headlines, and teasers can also help content grab the user’s attention, just be sure you can back it up (don’t want to create “click bait”).
TIP: Try to focus more on content the audience already knows, recognizes and cares about and less about your brand itself until you have brought them in and can further nurture/educate them.

2. Consideration (your goal) and Evaluation (audience stage)
   - What type of content would allow the audience to deep dive into your brand?
   - What type of content will help the audience easily weigh any potential decisions they have to make or help them do an easy comparison?
   - What types of content highlight your best value prop or pay off your key takeaway?
   - What types of content will draw the audience in to talking more specifics vs generalities?
   - What type of content will draw the audience in to talking more specifics vs generalities?

TIP: Content at this stage must balance accessibility (not too overwhelming or intimidating) with sufficient detail as the audience is most likely deep into research.

TIP: Your mantra here should be much closer to “thought leadership” than “entertainment”

3. Transaction (your goal) and Decision (audience stage)
   - What type of content will instill the most trust and confidence in your brand?
   - What type of content can mitigate any final audience objections or concerns?
   - What type of content is your best at “selling” the brand to someone?
   - What type of content illudes to the post-interaction (i.e., what to expect after you XYZ or you are only a couple steps away from ABC)?

TIP: The best content at this stage is very much outcome/results driven (i.e., stats).

TIP: To gain credibility, increase your transparency and accessibility (i.e., product demo or personal testimony)

4. Retention/Loyalty (your goal) and Repeat (audience stage)
   - What are some messaging considerations when speaking to a familiar audience?
   - What ways can you evolve or advance your messaging for someone who is already moved through it before?
   - What are some ways you can use messaging to stay top of mind with an audience even after they have completed their “goals”?
   - What are some messaging considerations for inspiring the audience to share with or refer new audience members?
   - What are your best Calls-to-Action for this stage (i.e., Stay In The Know)?

TIP: Reward your audience with exclusive content specifically catered to them and that provides more personalized value

TIP: Try to use content that lends itself to being shared (and make it easy to share)
TIP: Consider Serial Content that people will potentially automatically keep coming back for the “latest installment” of