Advertising Workflow Manual
Process, Guidelines and Templates
“The business that considers itself immune to the Necessity of advertising, sooner or later finds itself immune to business.”
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I. PROCESS, DEFINITIONS, AND GUIDELINES
I. Communication Agency Definitions/Guidelines

Introduction

In order to develop and execute effective advertising campaigns, Company brand managers must manage a matrix of internal and external teams. This can often be challenged by strict production timelines, as well as functional personnel/changes at their agencies.

The purpose of this manual is to outline The Company’s advertising workflow from both a strategic copy development and operational development view. This manual provides definitions, guidelines, forms and process models to help clarify roles and responsibilities and to offer guidance to brand management in advertising development.

Working with Communication Agencies

Advertising Agencies

The Company maintains corporate relationships with leading advertising agencies, that have specific Company brand assignments.

The agencies work under contracts that are updated annually based on individual brand scope-of-work. Brand managers interface with their agencies on an ongoing basis to develop advertising and promotional materials for various customer audiences. Specialized agencies are used for their expertise in specific communication categories.

The TFR and/or GBL will direct the brand manager to work with the brand agency on specific deliverables or tactics in an advertising campaign. Usually, the whole brand team, including market research members, is involved in strategic copy development.

The Executive Director of Global Advertising functions as a liaison for the brand teams and their agencies. The Advertising Director supports the brand teams by providing agency analysis, coordinating agency evaluations and conducting “pitches” for new brand assignments or to replace current advertising agencies. In addition, the Advertising Director supports the brand teams by managing the media AOR assignment and screening for new advertising opportunities/channels for Company marketing.

Key personnel or resource in advertising workflow:

- Global Advertising  Executive Director
- Media  Director
- Promotional Planning  Executive Director VP
- Marketing Operations  Director
- Production  Executive Director
- Promotional Review Submission  Promotional Review Oversight
### Current US Advertising Agency Assignments

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<th>Agency</th>
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<td>B</td>
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<td>C</td>
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<td>Consumer</td>
<td>New York City, NY</td>
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<td>O</td>
<td>Professional and Consumer Media - Media Agency</td>
<td>NYC/Parsippany, NJ</td>
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## Communication Agency Definitions/Guidelines

<table>
<thead>
<tr>
<th>What</th>
<th>Definition</th>
<th>Strategic Application</th>
<th>Tactical Application</th>
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<tbody>
<tr>
<td>Advertising</td>
<td>Brand messaging targeted at either Professional or Consumer customers with the purpose of promoting brand benefits to that audience. Usually free standing units of communication vs. embedded in text.</td>
<td>Deliver marketing objectives that include brand development via customer insight analysis; reaching target audiences with compelling imagery, benefit positioning and specific promotion.</td>
<td>Apply pressure to specific audiences with specific measures at specific times in order to deliver strategic positioning.</td>
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<tr>
<td>Public Relations</td>
<td>Brand or disease state messaging targeted at either Professional or Consumer customers with the purposes of: providing information raising awareness, creating buzz. Often embedded within the editorial context of News (TV, Radio, print or web-based) media.</td>
<td>Deliver marketing objectives that include extending reach of brand and disease awareness/ information to potential professional or consumer customers.</td>
<td>Articles or “mentions” in magazines, newspaper articles, TV, radio news. Often uses third party spokesperson as “credible mouthpiece” (celebrity, opinion leader, patient group leader, journalist, etc.)</td>
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<td>Advertising Categories</td>
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<tr>
<td>Professional Healthcare</td>
<td>Pharmaceutical brand advertising/promotion targeted directly at professional customers (i.e. physicians, nurses, KOL’s, etc.) in their professional communications environment.</td>
<td>Generate brand awareness among target HCPs and to motivate use through specific promotional messages.</td>
<td>Detail aids (Slim Jims, flash cards, etc.) rep materials. Journal ads</td>
</tr>
<tr>
<td>Direct-to-Patient (DTP)</td>
<td>Pharmaceutical brand advertising/promotion targeted directly at diagnosed patients. DTP campaigns can be delivered via patient brochures, direct mail, and internet. These communications are especially valuable in building database and compliance models, since they are targeted at diagnosed patients. DTP is generally not leveraged in mass media venues.</td>
<td>Reach diagnosed patients currently using our brand or competitive product with relevant and persuasive communications about their disease and treatment options.</td>
<td>Patient education materials - brochures, in-office collateral Direct mail and internet channels</td>
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</tbody>
</table>
## Advertising Workflow Manual Process, Guidelines and Templates

### Communication Agency Definitions/Guidelines

<table>
<thead>
<tr>
<th>Advertising Categories</th>
<th>Definition</th>
<th>Strategic Application</th>
<th>Unit Type</th>
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</thead>
<tbody>
<tr>
<td><strong>Consumer (DTC)</strong></td>
<td>Brand advertising targeted at Mass Market consumer audiences, or audiences comprised of diagnosed and undiagnosed patients. Pharmaceutical “DTC” leverages traditional consumer advertising media such as broadcast, print, radio and direct mail. It relies on the means, measurements and methodologies of consumer advertising to develop and execute.</td>
<td>To extend reach of brand or disease state information to both diagnosed and undiagnosed patients in order to optimize patient-physician dialogue.</td>
<td>Traditional: Journal/magazine ads; :30 and :60 television commercials (branded and unbranded or disease state); :30 and :60 radio spots; OOH (out-of-home) - billboards, posters, signage, newspaper pages. Non-Traditional: Internet banners and linkage; POP (point-of-purchase); FSI’s; inserts.</td>
</tr>
<tr>
<td><strong>Direct Marketing or RM, CRM (Relationship Marketing, Customer Relationship Marketing)</strong></td>
<td>One-on-One communications of brand benefit or disease information to professional or consumer customers.</td>
<td>Deliver marketing objectives that focus on specific promotion generating response in order to develop one-to-one brand relationship; build compliance and persistency.</td>
<td>Mail, phone scripts, fulfillment (DTP/DTC), telemarketing, internet</td>
</tr>
<tr>
<td><strong>Internet</strong></td>
<td>Specialized expertise in wired media and creative web execution. Adjunct advertising channel to core brand campaign.</td>
<td>Extend reach of brand benefit and disease state information to professional and consumer customers through interactive media.</td>
<td>Banners, links, opt-ins, text surveys</td>
</tr>
<tr>
<td><strong>Medical Education</strong></td>
<td>Brand or disease state information distributed as clinical information, updates, CME to professional audiences, including KOL’s.</td>
<td>To deliver marketing objectives that focus on generating awareness among key professional audiences such as physicians, researchers and pharmacists.</td>
<td>Publications, dinner meetings, symposia and advisory boards. Education materials, clinical reprints, training manuals. Round table meetings, websites, conferences.</td>
</tr>
</tbody>
</table>
## Roles and Responsibilities - Strategic

<table>
<thead>
<tr>
<th>What</th>
<th>Responsibility</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing Objectives</td>
<td>Brand Management</td>
<td>TFR sign-off</td>
</tr>
<tr>
<td>Scope-of-Work</td>
<td>Business Analysis</td>
<td>GBL sign-off</td>
</tr>
<tr>
<td>Brand Wheel</td>
<td>Evolved by brand and agency management in conjunction with Market Research.</td>
<td>TFR sign-off</td>
</tr>
<tr>
<td>Brand Ladder</td>
<td></td>
<td>TFR sign-off</td>
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<tr>
<td>Copy Platform</td>
<td>Brand and agency account planning.</td>
<td>GBL sign-off</td>
</tr>
<tr>
<td>Concepts</td>
<td>Agency management</td>
<td>GBL sign-off</td>
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<tr>
<td>Validation</td>
<td>Business Analysis</td>
<td>Brand management sign-off</td>
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<tr>
<td>Promotional Review</td>
<td>Brand management/Company Promotional Managers</td>
<td>Promotional Review sign-off</td>
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<tr>
<td>Revisions</td>
<td>Agency management/Company Promotional Managers</td>
<td>Promotional Review sign-off</td>
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<td>Release to Proofreading</td>
<td>Promotional Managers</td>
<td>Promotional manager Proofreading</td>
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<td>Proofreading faxes approval to Company production.</td>
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</table>
# Roles and Responsibilities - Operational

<table>
<thead>
<tr>
<th>What</th>
<th>Responsibility</th>
<th>Role</th>
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</thead>
<tbody>
<tr>
<td>Marketing Objectives</td>
<td>Brand Management</td>
<td>TFR sign-off</td>
</tr>
<tr>
<td>Scope-of-Work</td>
<td>Agency management</td>
<td>GBL sign-off; attached to contract</td>
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<tr>
<td>Work order for each tactic</td>
<td>Agency account management</td>
<td>Brand management sign-off</td>
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<tr>
<td>Job estimate for each tactic</td>
<td>Agency account management</td>
<td>Brand management sign-off</td>
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<tr>
<td>Promotional Review Submission</td>
<td>Agency account management</td>
<td>Brand management sign-off</td>
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<td>with Company promotional planner</td>
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<tr>
<td>Production schedule</td>
<td>Company promotional manager/agency production manager</td>
<td>Brand management copied by Company production</td>
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<tr>
<td>Weekly production status reports</td>
<td>Agency traffic coordinator</td>
<td>Agency account management/Company Promotional Manager</td>
</tr>
</tbody>
</table>
Process Overview

- Brand Wheel
- Copy Brief
- Scope of Work
- Marketing Objectives
- Production estimate
- Model Clearance
- Weekly Status Reports
- TE Schedule
- Work Order for each tactic
- Concepts
- Print Spec Sheet

- Promo Review approval
- Review & revisions
- Review & sign-off
- Promo Review review & sign-off
- Testing

- CTOC

Operational:
- Newark Trade
- Revise

Strategic:
- In-market!
II. ADVERTISING STRATEGIC TOOLS AND TEMPLATES
“Creative *without* strategy is called ‘art’. Creative *with* strategy is called ‘advertising’”

- *Ries and Trout*
II. Advertising Strategic Tools and Templates

The purpose of the advertising strategic development tools is to provide a standardized basis for our brands to delineate their brand identity platforms. The tools are also provided to assist brand management in defining the customer insights that drive Company branding and copy strategy.

All of these tools are utilized by Brand Management, Market Research and Agency Account Planners. There are many other ways to describe branding elements and copy strategy. In fact, most agencies have their own trademarked systems (i.e. “Brand Footprint”, “Copy Blueprint”, etc.). We do not discourage the use of those internal agency processes. However, in order to ensure that advertising campaigns are aligned behind a consistent insight-based approach, Company brand managers are required to use the strategic copy development guidelines and tools that follow:

- **Customer Insight - Research Process**  
  Outlines patient-physician research steps to develop copy strategy.

- **Brand Wheel**  
  A brand identity platform that is unique and own able by your brand alone.

- **Brand Value Ladder**  
  This is a simplified visual means to show how the brand delivers its benefits. Value ladders should be constructed for different customer audiences (i.e. professional vs. consumer).

- **Copy Brief**  
  This document reflects the customer insight/strategy and is used to develop advertising executions. It should be signed off by agency and brand management.
Research Process

Patients
- Key barriers to treatment identified
- Need to identify Unmet Needs & Motivators to Action
- Conduct Patient Segmentation & Positioning Opportunities
- Establish New Brand Platform
- Campaign & Message Development (DTC/DTP)

Physician
- Identify barriers to treatment
- Upgrade Unmet Need Awareness & Motivation to Treat
- Conduct MD Segmentation/Positioning Opportunities
- Establish New Brand Platform
- Campaign & Message Development

Eliminate Disconnect

EXPAND MARKET! GROW SCRIPTS!
Brand Wheel*

<table>
<thead>
<tr>
<th>Attributes</th>
<th>What the Brand is. Physical characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits</td>
<td>What the Brand does for me. Rational and emotional expectations, desirable consequence of the attribute.</td>
</tr>
<tr>
<td>Values</td>
<td>How the Brand makes me feel. The end emotional reward for using the brand.</td>
</tr>
<tr>
<td>Personality</td>
<td>The image of the Brand, as elicited in human characteristics - it combines rational and emotional perceptions.</td>
</tr>
<tr>
<td>Brand Essence/CPP</td>
<td>Enduring core promise of the Brand. A single idea that fuses the key emotional and functional roles of the Brand.</td>
</tr>
</tbody>
</table>

*Based on Consumer/Customer/Competitive insights.
Product to Brand Value Ladder*

- **Emotional**
  - Personal Value
  - Emotional Benefit
  - Functional Benefit
  - Feature

- **Rational**

  How brand makes *user feel about themselves.*

  How *brand* makes *user feel.*

  What *product* does.

  An aspect of the *product.*

*Based on Consumer/Customer/Competitive insights.*
Advertising

Copy Strategy Platform
Brand __________________________

Target Audience  Who are we talking to? What is their current behavior and what needs can be exploited?

Consumer/ Customer/ Competitive Insights
What insight do we have into customer behavior and attitude that can effect a change in attitudes and/or behavior that favors our brand, vs. competition, in achieving in its marketing objectives:
- Perceived or real weaknesses
- Barrier to overcome
- Untapped compelling desire/belief

Key Marketing Objective(s)  What is it the brand needs to accomplish? Increase penetration? Convert competitive users? Stimulate switching? Must be concrete measurable goals.

Brand Vision  Taken from MPH Plan.

Brand Position  MPH positioning statement. To who, vs. what and why (crisp!)

Copy Strategy  Convince (Target) that (Benefit) because (Support)
Copy Message Flow

**M&S Model: Impactful Opening**

- Core Messages
- Summary Call to Action

What It Is: (Problem the Brand solves) (Key functional benefits) (RTBs, CPP) Ask for business!

Brand Personality

**Does it differentiate the brand and provide the customer with additional reasons to choose our brand? Use words that you would like to describe the traits and values of a friend or family member.**

CPP

**Enduring core promise of the Brand. A single idea that fuses the key emotional and functional roles of the Brand.**

Legal/Regulatory Mandates

- Real, not executional
- Attach full PI

Agency/Creative Director

Client/Group Brand Leader

Agency/Account Director

Client/Team Leader

Date

Date
III. OPERATIONAL DEVELOPMENT
TOOLS AND TEMPLATES
“I know half the money I spend on advertising is wasted, but I can never find out which half”

- John Wanamaker
III. Operational Development Tools and Templates

Tools and Templates Overview
These forms actually help managers initiate, execute and produce brand advertising at Company. They also allow for a transparent process that can be monitored, double-checked for progress and clarity of direction by all internal/external stakeholders.

Since brand managers must matrix teams from internal and external organizations and because the advertising product is so important to brand building, these standardized forms MUST be used. No exceptions.

The following forms are included with examples.

- Annual Scope-of-Work
- Advertising Work Order
- Print Production Specifications Sheet
- Production Estimate
- Talent (Model) Approval
- Production Schedule
- Production Status Report
- CTOC Submission Sheet

Annual Scope-of-Work
This document reflects the annual tactical plan for the brand. It is a critical document to brand advertising because it:

- Is the basis for the advertising agency annual fee and contract.
- Guides timelines
- Is a reference point for Finance in the budgeting process.

The Scope-of-Work is completed by agency management and approved by brand management.

The GBL must sign-off. A copy goes to the Executive Director of Global Advertising and to Finance for attachment to the agency contract file.

Agency Staffing Proposal
This document is completed by agency management. It reflects the agency personnel that will be working to complete the scope-of-work, and is attached to the scope-of-work and agency contract.
Advertising Scope-of-Work Plan

Brand ___________________________ Agency ___________________________ Year ___________________________

# of Hours

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Advertising Staffing Proposal

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<th>% of Time</th>
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Advertising Work Order

The Advertising Work Order form will be used by each advertising agency to execute advertising at Company. The purpose of the work order is to provide:

• Clear direction for the specific advertising tactic
• Accountability and expectations for completion of the job

This form includes the following information:

• Communication objective
• Audience
• Date of use
• Reference/support
• Restrictions/mandatories

The Advertising Work Order requires a sign-off by brand and agency management to open the job.

The agency must provide a revised work order and obtain sign-off as the job evolves. This serves to help track production estimates and budgets.
Advertising Work Order

Original: ☐
Revised: ☐

Date: _______________________________
Brand: _______________________________
Agency: _______________________________
Job Initiator: ________________________
Phone #: ______________________________
FINANCE SYSTEM Project #:_______________
Agency Acct. Mgr :___________________
Phone #: ______________________________

Purpose (Communication Objective): _____________________________________________
______________________________________________________________________________

Job Description: _______________________________________________________________
Provide a brief summary of this job and how it delivers against objectives
______________________________________________________________________________

Audience: ______________________________________________________________________
Who is this communication directed to?

Timing: ________________________________________________________________________
When will it be used?

Support: ______________________________________________________________________
List or attain clinical references, PI, research study, etc.

Restriction/Mandatories: _________________________________________________________
Identify or highlight (i.e. fair balance)

Brand Mgr: __________________________ Agency Mgr: __________________________
Signature (date)          Signature (date)
**Agency Production Estimate**

Once the work order is approved, the agency will generate a production estimate to complete the job.

The production estimate is signed-off by brand management. “Ball park” printing should be included in order for Company production to establish bid prices.

The signed production estimate is attached to completed Finance forms - EC and PRFs.

EC = Company Event Commitment Form (This is PO, or Purchase Order that can trigger an invoice) PRF = Project Request Form - this opens the FINANCE SYSTEM number

The production estimate should reflect the talent model status (buyout or stock). Brand admins are responsible for EC and PRF forms.
PRODUCTION ESTIMATE

CLIENT: Company - Brand
Company Address
City, State  zipcode
Attn: Contact

AGENCY JOB No. 15253022
CLIENT No. 156600

PRODUCT Brand
JOB DESC. Physician Monitoring Chart

SIZE 8-1/2 x 11"
COLORS 4/C
QUANTITY 13,000
STOCK 100# Cover
No. PAGES 4

DESCRIPTION
Separations 500.00
Telefax 25.00
Freight/Messenger 200.00
Design - Canon Color (11 x 17") 20.00
Design - Disks:ZIP 20.00
Design - Electronic Mechanicals 336.00
Design - Conventional Studio Time 112.00
Design - Electronic Illustration High Res 560.00

TOTAL: 1,773.00

SALES TAX (* denotes taxable item): 00.00
ESTIMATE TOTAL: 1,773.00

COMMENTS: Printing 13,000 copies of a 4-page, 8-1/2 x 11", 4/C chart on 100# cover stock estimated at $5000.; vendor will invoice client directly.

APPROVALS:
CLIENT ___________________________ DATE ____________
ACCOUNT EXECUTIVE ___________________________ DATE ____________
BUSINESS MANAGER ___________________________ DATE ____________
Revised Production Estimate

- Reflects copy/layout revisions
- Completed by Agency Account Management
- Sign-off by Brand Management and Agency for approval
- Update FINANCE SYSTEM allocation

Production Schedule

The production schedule is initiated by the agency production manager in conjunction with Company brand production manager.

The production schedule is based on PM (Company Planning Meetings) timing for T1, T2, and T3.

All production must align with shipment dates for the meetings.

Brand Management approves the schedule.
### Status Report

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### Client Details

- **Client Number**: 156600
- **Contact Name**: R Abdul-haqq, P. Bergin, K. Harrington-Smith, M. Grigorieff, K. Kole, G. Olsen, W. Ross, S. Santos, S. Trieu
- **EA** = Estimate Approved
- **EN** = Estimate Needed
- **PO** = Awaiting PO
- **NA** = Need Approval
- **EB** = Estimate Billed
- **PO** = Awaiting PO
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Print Specification Sheet

The print specification sheet is triggered by the work order approval.

The print specification sheet is issued by Company production to the agency. The agency must complete the form. It accompanies all disk releases to Company production.

The print specification sheet details all aspects of print production (i.e. binding, packing, weight, etc.)
### PRINT SPECIFICATION SHEET

**Agency** | **AGENCY**
---|---
**Contact** | **AGENCY CONTACT**
---|---
**Product** | **BRAND**
---|---
**Company #** | **LTR-1087**
---|---
**Agency #** | **15253004**

**Job Name** | **HEALTH SELL-IN FLASHCARD**
---|---
**Description** | **2-SIDED FLASHCARD**
---|---
**Component** | **1**
---|---
**Quantity** | **A) 3507 B) S/C C) PI Req’d?**
---|---
**Allowable Overs** | **10 %**

**Number of Pages** | **2**
---|---
**Stock** | **Cover: 100# WHITE GLOSS COVER C2/S**
---|---
**Text** | **Specify 4 C/P PMS Same both sides?**
---|---
**Colors** | **Covers:**
---|---
**Pre-press** | **VENDOR TO CHECK ALL TRAPS & PLACE HI-RES ART:**
---|---
**Bindery** | **Perfect Bind**
---|---
**Shipping** | **WAREHOUSE**
---|---
**Other Info** | **Samples: Agency 25 Disk Release: 06/19/10**
---|---
**Other** | **Company Prod 5 Due Date: 07/08/10**
---|---
**Packing** | **S/W in 3’S Paper Band in Rubber Band in Convenient Lots Bulk in/cartons**
---|---
**Printer** | **Est. #**
---|---
**Quantity** | **Base Price**
---|---
**Overs** | **10 %**
---|---
**Tax** | **Shipping**
---|---
**Total** | **Stock: Covers:**
---|---
**Shipping** | **Rolls:**
---|---
**Schedule:** | **Schedule:**
---|---
**Signature** | **Date**
Print Model/Talent

Agencies are required to supply Company with a list of all models used in ads:

- Model name
- Date used
- Brand name
- Agency name
- Agency art director

Company will compile a database of all currently used models via this process.

Prior to actual production, the agency must screen for model legacy use to avoid category or corporate duplication.

A box is noted on the production estimate to indicate buy-out or stock status.
PLEASE FAX OR E-MAIL THE FOLLOWING INFORMATION TO:

CONTACT
Company Corporation
Marketing Operations
Company Address
Company City, ST zipcode

Phone: 555-555-5000
Fax: 555-555-5100
Email@Company.com

Date: ________________________________
Model Name: ________________________________
Brand: ________________________________
Company #: ________________________________
Ad Agency Name: Ad ________________________________
Agency Contact: Ad ________________________________
Agency Phone #: Ad ________________________________
Agency Fax: ________________________________
Models

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<th>Date</th>
<th>Model Name</th>
<th>Brand</th>
<th>Company #</th>
<th>Ad Agency Name</th>
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Production Status Reports

The production status report is a useful tracking tool to monitor all brand advertising production activity. This document also helps brand management anticipate production/approval delays and budget overruns. This establishes appropriate expectations with brand stakeholders.

- Company format issued to all agencies.
- Status report will be updated by agency traffic coordinator
- Status report will be used by the brand team and promotional managers for weekly status meetings.

Promotional Review Submission Description Form

All advertising to be submitted for Promotional Review Approval needs to have a Submission Description Form attached. Using this form will help expedite the advertising approval process. It is the responsibility of the Company Promotional Planners to ensure that the forms are completed and attached at each Promotional Review submission.
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</table>
PROMOTIONAL REVIEW PROCESS CHECKLIST

Name of piece: 
Initiator: 
Initiator phone #: 
Initiator fax #: 

Item description (include type of piece/program): 

Users of piece: 

Intended audience of piece: 

Projected date of first use (be specific): 

List additional clarifying information (i.e. How will it be used? Are there multiple components? Has this been used before? Are there other core teams reviewing this?)

Current brand PMS colors are utilized.
Current and appropriate fairbalance is included.
Current brand logo is utilized.
Any new brand claims are highlighted and referenced.
Annotated references for new claims are attached.
References are cited correctly and in proper placement/location.
If this submission is a revision, the previous/original material is attached. Also, the specific areas on both pieces, which have been changed, have been highlighted.
Registered trademark statements for all competitive products are current and included.
Information solely for sales representative training purposes – appropriately marked and designated confidential.
Prooforead for grammatical and spelling accuracy.
Novelties sign off is correctly cited on bottom of back page.
Prescribing information is correctly displayed (accompanying/enveloped or provided separately).
Final layout provided to reviewers (include one color copy for test jacket reference).
Proper amount of copies of piece submitted to trackers.

______________________________________________
Signature of Submitter
IV. ADVERTISING AGENCY MANAGEMENT TOOLS
“I have learned that you can’t have good advertising without a good client and that you can’t keep a good client without good advertising.”

— Leo Burnett
IV. Advertising Agency Management Tools

Company advertising agency partners are compensated with incentives based on brand sales targets delivery. They are also evaluated annually by the brand teams in a “360º” performance review.

The agency evaluation process provides an opportunity for brand management to assess the performance of their agencies in select criteria including account service, creative, research, media, production and productivity.

Process and Forms

In January, the Advertising Director will ask each brand team to submit their annual agency evaluation. Simultaneously, agencies are asked to review client leadership and direction.

The evaluations are collected by Advertising for an overall report to Company executive management.

Individual one-on-one meetings are held with agency and Company management to go over the performance reviews and establish expectations for the next six months.

Mid-year evaluations are meant to serve as updates and to gauge progress to goals for year end.
Advertising Agency Performance
Annual Review

Agency: ________________________________

Brand: ________________________________

Review Period: ________________________ To ________________________

Reviewed by Company:
Name: ________________________________
Title: ________________________________
Date: ________________________________

Received by Agency:
Name: ________________________________
Title: ________________________________
Date: ________________________________
Advertising Agency Performance
Annual Review

I. EXECUTIVE SUMMARY
Reviewer to summarize overall performance based on ratings and comments.

II. KEY CONTRIBUTIONS
Reviewer should list real agency achievements that have aided in advancement of marketing objectives.

III. OPPORTUNITIES FOR IMPROVEMENT
Reviewer to summarize specific areas that agency may improve upon, with examples.
# Agency Review

## Definitions of Rating Terms

<table>
<thead>
<tr>
<th>Rating</th>
<th>Description</th>
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<tbody>
<tr>
<td>5</td>
<td><strong>Far Exceeds Overall Expectations</strong> - Agency behavior or performance consistently exceeds expectations for virtually all standards, goals and projects.</td>
</tr>
<tr>
<td>4</td>
<td><strong>Exceeds Overall Expectations</strong> - Agency behavior/performance consistently meets or exceeds virtually all standards and established goals/projects. Results exceed expectations in several significant accomplishment areas.</td>
</tr>
<tr>
<td>3</td>
<td><strong>Meets Overall Expectations</strong> - Agency consistently attains most established goals and meets most behavior and performance standards. Lower results in some areas are offset by higher results in others. An agency rated at this level is considered a valued supplier, is meeting job requirements in a competent manner, and is making an important contribution.</td>
</tr>
<tr>
<td>2</td>
<td><strong>Needs Improvement</strong> - Agency accomplishment in some key areas of the job are below the established goals and behavior/performance standards. A rating at this level requires a formal improvement program (specific improvements targets, coaching, and training as appropriate) to help the agency improve.</td>
</tr>
<tr>
<td>1</td>
<td><strong>Unacceptable</strong> - Agency behavior/performance results and goal accomplishments are consistently below an acceptable level. The agency should be placed on probation, and given a list of expected improvements to be made by specific dates. The objective is to elevate performance to an acceptable level within a stated period of time.</td>
</tr>
</tbody>
</table>
A. Account Management

Provides strategic input regarding markets/media, environments, and understands medical issues.

Develops initiatives to help build our business; pushes envelope.

Knowledge of and commitment to the business/products.

Assures ideas/recommendations are scientifically sound, have practical value, and impact on the business.

Provides a firm point-of-view with rationale for their recommendations.

Fosters a sense of partnership with the client.

Takes client direction well, directs creative appropriately.

Manages the process of setting and adhering to priorities.

Adapts to changes in client organization and needs.

Inspires confidence in day-to-day administration.

Demonstrates fiscal responsibility; provides accurate budget information; monitors costs; gives early warning of cost overruns.

Summary Rating (Average for Category)
Agency Review
Standards of Performance

B. Creative Services
Agency produces fresh ideas and original approaches. Innovation, uniqueness and stopping power are reflected in the final product.

Agency accurately interprets facts, strategies and objectives into usable communications and plans.

Creative group is knowledgeable about therapeutic area and competitive marketing environment.

Creative group works closely with Client on strategic development.

Creative team has iterative capability, can adapt quickly to research findings.

Creative group produces on time, performs well under pressure.

Creative group operates in a business-like manner to control production costs and other creative charges.

Agency presentations are well organized with sufficient examples of proposed executions.

Agency willingly accepts ideas generated by other Client locations/Agency offices vs. being overprotective of its own creative product.

Summary Rating (Average for Category)

Specific examples for the above ratings and comment on Account Team Service:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
Agency Review

Standards of Performance

C. Research/Strategic Planning

Listen to and empathizes with the client’s up-front thoughts and points-of-view regarding brand, customer and business issues.

Creates a collaborative environment whereby the Brand Group and the Agency work together as a “planning team”.

Identifies and evaluates market trends and competitor strategies to include strengths and weaknesses.

Suggests innovative qualitative and quantitative research projects, copy testing and brand testing studies.

Generates brand ideas and develops brand strategies and creative briefs that are customer relevant, solution-oriented and creatively inspiring.

Campaigns to keep the essence and spirit of brand/customer relationships alive throughout the advertising process.

Summary Rating (Average for Category)

Specific examples for the above ratings and comment on Account Team Service:

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________
## Agency Review

### Standards of Performance

#### D. Integrated Media

<table>
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<tr>
<th>Rating 1 - 5</th>
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- Presents fresh approaches, which go beyond the expected; recommends new and non-traditional media to address new markets and expanding audiences.
- Quality of traditional media suggestions (i.e. journals)
- Phase IV and educational recommendations.
- Participation/recommendations, regarding any ROI analysis.
- Effectively deals with the media on our behalf.

**Summary Rating (Average for Category)**  
___________

#### E. Managed Care Focus

<table>
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<tr>
<th>Rating 1 - 5</th>
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<td>____________</td>
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- Agency knowledge of Managed Care issues.
- Effectiveness in supporting our needs in this area.
- Level of initiative shown in making suggestions.
- Quality of recommendations.
- Commitment to this area of our business.

**Summary Rating (Average for Category)**  
___________
Agency Review
Standards of Performance

F. Production (filled out by Company Print Production)

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<tr>
<th>Rating 1 - 5</th>
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<tr>
<td>Adherence to clearance procedures and completeness of copy submissions. ____________</td>
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<td>Quality of finished product when given responsibility for it. ____________</td>
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<td>Disks/mechanicals/art prepared to industry standards. ____________</td>
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<tr>
<td>Print spec sheet and estimate provided on schedule. ____________</td>
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<tr>
<td>Cooperation and assistance in meeting established deadlines, providing requested information, etc. ____________</td>
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Summary Rating (Average for Category) ____________

G. Productivity/SOP’s

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<th>Rating 1 - 5</th>
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<td>Agency has validated and accounted for all time spent on assigned projects. ____________</td>
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<td>Agency has made an effort to align with benchmarked productivity rates. ____________</td>
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<td>Agency has been timely and thorough in invoicing fee hours. ____________</td>
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<td>Agency has been timely and responsible in invoicing OOPs. ____________</td>
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Summary Rating (Average for Category) ____________
# Advertising Agency Performance

## Annual Review

### Performance vs. Goal

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<tr>
<th>BRANDS</th>
<th>BUSINESS RESULTS</th>
<th>PERFORMANCE STANDARDS</th>
<th>OVERALL</th>
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5 = Far Exceeds Overall Expectations  
4 = Exceeds Overall Expectations  
3 = Meets Overall Expectations  
2 = Needs Improvement  
1 = Unacceptable
Agency/Client Review

Agency: __________________________________________________________

Time Period: ______________________________________________________

Reviewer:  
Name
Title
Date
## Agency/Client Review

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<th>Occasionally</th>
<th>Never</th>
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1. Brand team provides clear direction, sets objectives, expectations.
2. Brand team provides clear timelines, sense of urgency.
3. Brand team provides thoughtful response to Creative, evaluates against strategic platform.
4. Brand team listens to agency point-of-view, responds respectfully.
5. Brand team encourages agency initiative, pro-activity.
6. Brand team keeps agency informed on issues relevant to performance (e.g. clinical testing, budget, etc.)
7. Brand team works to involve agency as much as possible in all marketing activity.
8. Brand team is timely and upfront in addressing working/personnel issues related to agency performance.
9. Brand team is timely with decisions involving media expenditures.
10. Brand team offers a sense of partnership and teamwork to agency.
Agency/Client Review

Agency: _______________  Brand: _______________  Time Period: _______________

1. Additional comments and specific examples for ratings on preceding page:

2. Please identify 3-5 specific positive examples of this in agency/client relationship:

3. Please identify 3-5 specific examples which provide opportunities for improvement in this agency/client relationship.
Pitch Process

For advertising agency pitches we strive to utilize a phased approach in order to maximize:

- Strategic vs. executional assessment
- Exposure to varied top agency talents
- Opportunities for brand management participation (including global and US teams) The pitch process proceeds as indicated:

Phase I
Identify agency candidates
- Select criteria
- Assess conflicts and brand capability

Phase II
Submit RFP to select agencies, 3-4 weeks
Request:
- Capabilities
- Strategic/branding process
- Case studies
- Strategic assessment of Company assignment
- Audience analysis
- Proposal implementation

Require:
- 2-hour presentation
- Leave behinds with back-ups

Phase III
Presentations to Company panel, 1 day
Panel selects 2-3 for Phase IV

Phase IV
Creative presentations - 2 hours 2 weeks
Copies of work for review/testing

Phase V
Company panel reviews using quantitative measures. 1 day
Awards business.

Total time = 6-8 weeks

Phase I is provided as an annual overview to executive management. It is possible to collapse Phase III (strategic assessment) and IV (creative execution), but it is not optional.

An agency briefing document is provided to the agencies at Phase II, once Confidentiality Agreements are signed. The Briefing is conducted by Brand Management.
Roles and Responsibilities

Pitch leader: Executive Director, Global Advertising

Key stakeholders: Company senior management: TFR’s (Global & US)
Group Brand directors and product directors

Pitch panel: Market Research (1 US, 1 Global)
Brand Management (2-3 US, 1-2 Global)
Marketing Operations (1)
Sales Management (1)
Agency Selection Criteria

Several criteria are used to evaluate agencies. The following provides an overview:

Industry Benchmarks

Network
Identifies Global Holding company for the agency. Each network represents particular strengths/weakness in the marketplace - and, they are all tracked in industry reportage, Dow Jones, NASDAQ, etc.

Income; % Change
Total agency revenues. We look at these measures to assess agency strength and growth - as well as its size. The size can reflect on internal agency resources/capacity.

Billings; % Change
These figures, when viewed against income, provide an idea of agency profitability. This can also point to agency stability and depths of its resources. Too much profitability may also indicate potential service “issues”.

FTE’s; % Change
Reinforces growth and stability indicators at the agency.

Key Accounts
Identifies which businesses are critical to the agency, and also provides insight into their capability or creative pool, by observation of brand campaigns.

Subjective Benchmarks

US/Global
We are interested in agencies that can serve our brands all over the world, in order to better align branding/communications and to optimize marketing efforts.

# Blockbusters
This gives us an idea of the agency’s capacity to drive big, brand successes.

# Brands > $500 mm
Reflects on agency ability to manage large brands with multiple constituencies, and multi-level client teams.

Awards/Marquis Personnel
Indicates agency’s ability to attract top creative talent.

Integration Partners
Allows us to consider who and how well they integrate with multiple agency partners and marketing suppliers - and to judge the quality of this important capability.
SAMPLE RFP

Agency
Address
City, State Zip
Attn: Director of Client Services

Dear XX:

The Company is conducting a review of Advertising Agencies to develop and execute advertising for its (brand). This will be a global assignment with emphasis on US execution followed by a global rollout in various countries.

REVIEW PROCEDURE OVERVIEW

The procedure that will be followed in this review is outlined below:

1. Agencies will provide a capabilities review in response to this document by (date).

2. Select Agencies will be briefed and requested to provide presentations to a panel of marketing executives here at Company the week of (date).

3. Award Agency to begin work date, with initial goal of in-market testing by (date).

Company will reimburse the Select Agencies for their creative presentations in the amount of $10 - $20K.

REVIEW PROCEDURE DETAILS

The first deliverable from the Agency should include the following components:

1. A brief review of your agency’s credentials including a statement about what it is in your agency’s experience, resources and professional accomplishments that makes it especially well-qualified to handle (brand).

2. A description of the internal processes that your agency follows in developing and evaluating advertising campaigns.

It is important that you describe how the various disciplines in your agency (account, creative, planning/research, media, etc) integrate with each other in these internal processes and also how you organize yourselves to provide seamless and proactive interaction with your clients as those processes evolve.
The description of internal processes and how they interact with your clients should be illustrated by:

- Your point of view about the nature of the targeting and messaging issues that currently face pharmaceutical brands like (product) as they attempt to reveal their brand essence and benefits to their audiences.

- A discussion of how these issues would affect creative and media strategy development for (product) communications in the future

3. A presentation of Advertising and other communications materials/programs developed by your agency that illustrate solutions in situations that you believe to be analogous to those faced by (product).

For each of these advertising/communication solutions that you describe, we would like to know the kinds of benefits that accrued to your clients as a result of this program.

The Company panel would also like to receive a written document for subsequent review that would cover these topics:

- A list of Global and US clients and the specific advertising assignments your agency has from each client.
- A list of your five largest clients and the approximate proportion of your total gross billings provided by those clients in 1999, 2000 and 2001.
- A list of the advertising accounts and total billings gained over the last three years.
- A list of the advertising accounts and total billings lost or resigned over the last three years.
- A description of the work histories of the key individuals that you have designated as those who would work on Company/(brand).
- A brief summary of how you would serve a Global client based in Europe with the US as the key growth market.

The Company will choose three or four finalist agencies to make a second presentation to a larger group of Company executives. These final presentations are currently scheduled for the (date).

You will be asked at the second presentation to briefly represent the credentials of your agency and to present an overview of the advertising and communications programs you would recommend for (product).

If you are interested in participating in this advertising agency review, please let me know immediately. In addition, if you choose to participate, please return the attached confidentiality agreement by return overnight mail. We will forward an information packet to you that contains backgrounding on the product and its campaigns to date.

We look forward to hearing from you, and to a mutually rewarding experience in the process.

Best regards,

Executive Director,
Global Advertising
# SAMPLE

Agency Pitch Agenda

<table>
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<tr>
<th>Agency</th>
<th>Time</th>
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<tbody>
<tr>
<td>Agency A</td>
<td>8:00 a.m. - 10:00 a.m.</td>
</tr>
<tr>
<td>Agency B</td>
<td>10:15 a.m. - 12:15 p.m.</td>
</tr>
<tr>
<td>Agency C</td>
<td>12:30 p.m. - 2:30 p.m.</td>
</tr>
<tr>
<td>Agency D</td>
<td>2:45 p.m. - 4:45 p.m.</td>
</tr>
<tr>
<td>Debrief</td>
<td>5:00 p.m. - 6:00 p.m.</td>
</tr>
</tbody>
</table>
Pitch Day Information

Process Overview

Agency evaluation forms are attached. These forms are meant to help you assess each agency individually.

In the debrief, we will calculate the scores from each of your individual assessments in order to compare all four agencies on each criteria.

Once an overall chart is completed, we will begin our final round of discussion. If you currently work with one of the agencies, your point of view may be leveraged by the group on specific agency performance.

The Evaluation Forms

Fill out each agency’s evaluation immediately following their presentation. Your impressions should be clearest regarding their individual approach then.

There are three key evaluation sections:

Market knowledge
Brand recommendation
Agency dynamics

Each section contains 5-6 criteria to evaluate on a 1-5 scale. Thinking points are also indicated for each criteria for you to consider when scoring. Please include the TOTAL for each section in the lower right corner.

When filling out the forms, use your best judgment, based on your own experience. (Hint: Be spontaneous and instinctive.) The final matrix score will help guide our debriefing discussion - but may not necessarily determine the “winner”.
Agency Evaluation Criteria

For this presentation, use a scale of 1-5 to reflect your perception of the agency’s performance in each area. A rating of “1” means no ability, a rating of “5” reflects outstanding ability.

**MARKET KNOWLEDGE**

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1. Demonstrates understanding of product and category dynamics
2. Demonstrates understanding of clinical issues, rules and regulations
3. Grasp of competitive environment
4. Clear definition of professional target
5. Clear definition of patient target

**TOTAL MARKET KNOWLEDGE**

Total