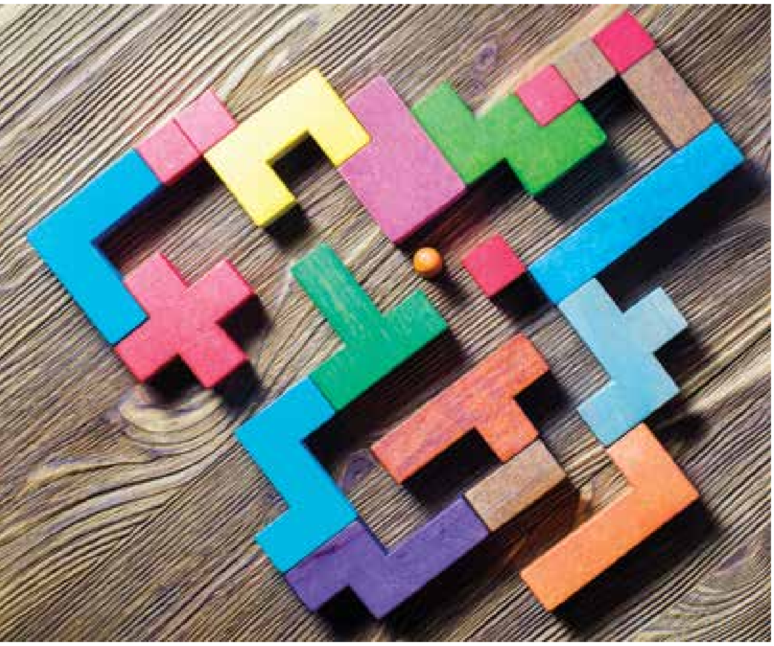


Think Like They Think to Do What We Do: The Creative Strategy Framework

BY DOUGLAS DAVIS

Though clients request our services for a variety of reasons, they show up with different forms of the exact same request: "Solve my problem". This article based on the *Creative Strategy and the Business of Design*, discusses the importance of creativity in a business discussion's final outcome's success.

Chances are that you've heard the quote "the whole is *greater* than the sum of its parts" but that's actually not what the Gestalt psychologist Kurt Koffka said. When this was translated into English from German, it turns out that the word "greater" was substituted for his original word choice, "other". According to Dr. Russ Dewey's textbook *Psychology: An Introduction*, "Koffka did not like that translation. He firmly corrected students who substituted 'greater' for 'other'" (Heider, 1977). "This is not a principle of addition", he said. The statement as originally worded was supposed to mean that the whole had an *independent existence* in the perceptual system.

"[T]he whole is 'other' than the sum of its parts." It seems to me that Koffka's observations were the clearest explanation for the magic that happens in the creative process when all the individual elements are leveraged correctly. Something other happens. I guess you could argue that the butterfly is *greater* than the caterpillar, but it seems to me that argument would miss the magic of the caterpillar turning into the butterfly. At its best, what is inspired by the strategic entertains, educates, and resonates with its target on a deeper level than just buying and selling. The work we create, whether visual or verbal, is magic inspired by the sum of its parts. To harness that inspiration, this chapter will focus on the organisation and quality of those parts.

At its best, what is inspired by the strategic entertains, educates, and resonates with its target on a deeper level than just buying and selling.

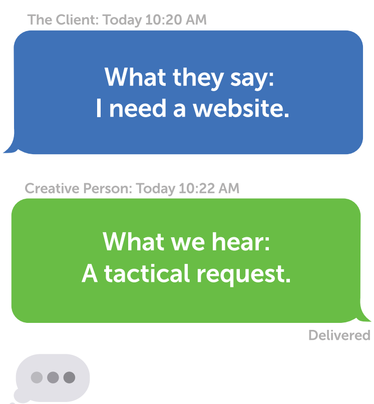
Finding Order in Chaos: Context

Designers work in various levels of order and chaos. And yes, a large percentage of that chaos is internal. It seems to come with the gift of creativity. However, the external chaos is a combination of the do-it-now culture we work in and the people we work with. A creative project kickoff can range anywhere from a very organised formal briefing to a haphazard, vague Word document attached to an e-mail. I've often left briefing meetings with either too much or irrelevant information – but have never left with *all* the information. And even then, *all* the information must be whittled down to the *right* information. Yet the expectation on us all is basically the same: Make it pretty by the deadline.

The best part of this is that even if a group of creatives starts with the same information, each person's creative process will be different in some way. For example, I struggled with the fact that I didn't like structure, yet felt overwhelmed when trying to digest all the information I'd gathered to address the business and marketing considerations with creativity. I felt disorganised and inefficient, which left me panicked and tensed as sand poured downward toward my deadline. I needed a framework to help me organise the content that would inspire my work – something that would allow me the freedom to take risks with the relevant information.

So while in my Competitive Strategy course at NYU one day, Direct Marketing 2012 Hall of Fame inductee Dr. Marjorie Kalter challenged any one of us to step to the whiteboard and offer a strategic recommendation. After looking around a bit, I stood up and what I've named the creative strategy framework is what came out.

Creative Strategy Framework



Since then, I've used this framework to:

- Develop client recommendations for new-business pitches
- Uncover strategic threads that inspire conceptual ideas
- Use the threads as a basis for developing strategic documents such as creative briefs
- Organise my notes in a kickoff meeting
- Serve as a group strategy session or thought-starter tool

Here's how it works. The categories are composed of information that you'll usually get from a variety of places, including the client, internal briefings, the marketing folks, and your own research. It is helpful to begin the organisation process of using this framework right in the kickoff meeting. After taking the time to research the brand, product, or service on your own, use the following three steps to populate the framework.

Step 1: Quantity

Organise your research into the corresponding columns. List all possible target groups; fill in the facts on the brand, product, or service; tease out the features and corresponding benefits of the offering; and draft any communications messaging or client objectives. Don't get too bogged down in details at this point, just place all your research into the appropriate category. Try to exhaust each individual column of information within 45 to 60 minutes.

Step 2: Quality

At this stage, you'll consider each element in each column. You're looking to eliminate irrelevant items through a series of questions or reword your content to become more specific. Have we fully defined the target segments in demographic, psychographic, and behavioural characteristics? Could we build a campaign off each fact listed about the brand, product, or service? Is that indeed the consumer benefit resulting from this feature? Does that message communicate the takeaway we would like the target to leave with? Have we recognised any additional opportunities beyond the objectives our client gave us?

Step 3: Pull Strategic Threads

After populating this framework vertically, look for connections horizontally. I call these "threads". They may not be obvious at first. The value here is the unexpected connections that emerge across categories to help you find inspiration within order. Ultimately, you should end up with quite a few viable connections you could discuss, generate concepts from, and defend like this:

The best part of this is that even if a group of creatives starts with the same information, each person's creative process will be different in some way.

Charts 1-3: Courtesy of Rick Redznak, The Davis Group

Based on their need or behaviour, this Target > Would be interested in a conversation centred around this Fact > Using this Feature/Benefit in the headline & copy to get their attention > To deliver this Message or accomplish this Objective (message or objective is your choice based on what is needed).

With a single strategic thread you can now write a brief, create relevant design concepts, write compelling copy, or make recommendations on how a client could move forward with this line of reasoning.

A Jumping-Off Point. It is important to state that the creative strategy framework is not a template, formula, or recipe – again, it is a framework to organise all the relevant information and use it as a basis to create from. With order, I found clarity, which led to increased inspiration and risk-taking because I was on brand, on strategy, and on message.

Using the Creative Strategy Framework

If, at this point, you are thinking about how you could use this framework with something you are currently working on, you can jump to the next chapter to get started right now. If you'd like more of an overview of how to use the framework in general, continue on in this chapter. Remember, there is no right and wrong way to do this. The faster you find ways to apply the concepts you learn to your everyday life, the greater their value.

Creative Strategy Framework: Column by Column

Define Targets in fragments that state demographics, psychographics, and/or behavioural terms. Decide whether the job should be

Remember, there is no right and wrong way to do this. The faster you find ways to apply the concepts you learn to your everyday life, the greater their value.

focused on the brand or a particular product or service within the brand. A Feature is a physical quality or tangible attribute that defines the product. A Message is what the target should take away from your brand communications.

Look here for logical ways to create segmentation. You could look for differences in life stage or why the group would seek the brand, product, or service. Look beyond the brand's website for good and bad items to list here. Blogs and reviews will show any gaps between what the company says and what the customer is experiencing. Tangible features often have intangible benefits and thus these are written as a ratio. This Feature/enables this corresponding Benefit. A client Objective usually begins with a verb: Convert, Drive, Engage, Build, Grow, Increase, Decrease, etc. by % among X target. Place both messages and objectives here so that you can give yourself flexibility to determine which is more important to focus on in your pitch or develop solutions that focus on both.

Business Objectives

Putting the Tool to Work. If you need more context on how you could use the tool, this section is for you. As I mentioned, I've found the framework to be very versatile – it can be used in a variety of settings with a range of personnel. Here's a rundown of how this could help in various roles.

• If you are a **creative director/art director**, I've found that the process works best in a brainstorming or strategy session, especially when you would like your team to become more self-reliant. When you and the troops are locked in a war room with a whiteboard, allow your whole team to supply the content for each column. While hanging back

The framework is only as good as the information you populate it with. Be discerning, and though you may have to give this a few tries, it will yield a strategic foundation enabling the creatives to take risks while remaining on strategy.

a bit at the 30K-foot view, you can watch the leaders emerge and pepper in suggestions here and there. Mainly you're there to keep the discussion on topic, and over time your team will be able to present concepts that are on brand, on strategy, and on message. This technique allows the junior creatives to become more strategic and independent.

• In **agency environments with mixed teams** on a new-business pitch or answering a request for proposal (RFP), it's best for one writer to lead from the board. It goes faster this way, because most times people in that scenario are already familiar with strategy.

• If you are a **working professional** using this at a meeting, organising your notes within the framework helps to identify any holes and specific questions to ask while still in the meeting.

Best Practices

You can see which methods work best for you and your team, but here are some best practices I've learned after years of implementing this framework.

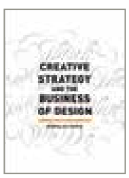
• **Random is the order.** Expect to hop around in the process of populating the chart with information; you don't need to fill in the columns in any order. As stated earlier, you'll only get some of the information you need and you'll have to seek the answers to the questions that arise to fill in missing pieces. For example, in a new product launch pitch, you may have extensive information about the brand or service but nothing about the new target you plan to identify and suggest the client go after. In that scenario, you'll have quite a bit of information for the second and third columns – Facts and Feature/Benefit respectively – but not a lot of product-specific history to pull from. When brainstorming to develop a new campaign for an existing client, the messaging, target, or marketing objectives may be clear upfront. It may be up to you to find a new insight about the target's values and zero in on a relevant feature/benefit or compelling fact that could move the needle in the work. The point is that you should populate the chart wherever starting makes sense based on the information you have at the time. Again, this is about finding the gold through connecting the dots that emerge across categories.

• **It's not set in stone.** Since the process of compiling all the information precedes the process of whittling down to the right information, the chart should be a working document.

• **Keep your eye out for potential barriers to purchase.** Your kickoff meeting will likely yield some client objectives and positive information about the brand from the client, but the client may *not* have included any negative information consumers have stated about their experiences with the brand. Every time a new consumer uses the product, it's the moment of truth, when what is advertised is either as advertised or not true. If the experience goes well, you may have just gained an advocate who will post a positive comment based on his or her experience. As you know, this is the gold potential customers dig for when they Google your brand in their research phase of the journey. On the other hand, bad news travels at twice the speed of light in social media, where negative tweets or Yelp reviews can go viral. Therefore, when developing recommendations, it is imperative to find any gaps in what the company says about itself and what the public says about the brand experience. Be resourceful in where you look for reviews based on the target's existing behaviour. Use any discrepancies or mixed signals as an opportunity to build solutions that address the problems.

• **The framework is only as good as the information you populate it with.** You know what they say: Garbage in, garbage out. If you and your team spend the time up front to populate this framework with well-researched, thoughtful information, the work becomes stronger because it is focused only on what is relevant. Even if you have many different teams working from the same framework, you could give each a different strategic thread or write possible areas to explore based on multiple threads. Either way, the content in the framework will ensure that none of the teams are on a tangent because they are all working with relevant information. Be discerning, and though you may have to give this a few tries, it will yield a strategic foundation enabling the creatives to take risks while remaining on strategy.

About the Author



Brooklyn-based **Douglas Davis** enjoys being one of the variety of voices needed in front of and behind the concept, strategy or execution. His first book, *Creative Strategy and the Business of Design* was just published June 2016. Douglas is an Associate Professor within the Communication Design Department at New York City College of Technology and an adjunct in the Branding and Integrated Communications (BIC) program at the City College in New York City.