Coordinate production of brochures and marketing materials

D2.TCS.CL5.06

Trainee Manual



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William Angliss Institute
Specialist centre for foods, tourism & hospitality

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Project Base

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The Association of Southeast Asian Nations (ASEAN) was established on 8 August 1967. The Member States of the Association are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand and Viet Nam.

The ASEAN Secretariat is based in Jakarta, Indonesia.

General Information on ASEAN appears online at the ASEAN Website: www.asean.org.

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Disclaimer

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Table of contents

Introduction to trainee manual

To the Trainee

Congratulations on joining this course. This Trainee Manual is one part of a ‘toolbox’ which is a resource provided to trainees, trainers and assessors to help you become competent in various areas of your work.

The ‘toolbox’ consists of three elements:

- A Trainee Manual for you to read and study at home or in class
- A Trainer Guide with Power Point slides to help your Trainer explain the content of the training material and provide class activities to help with practice
- An Assessment Manual which provides your Assessor with oral and written questions and other assessment tasks to establish whether or not you have achieved competency.

The first thing you may notice is that this training program and the information you find in the Trainee Manual seems different to the textbooks you have used previously. This is because the method of instruction and examination is different. The method used is called Competency based training (CBT) and Competency based assessment (CBA). CBT and CBA is the training and assessment system chosen by ASEAN (Association of South-East Asian Nations) to train people to work in the tourism and hospitality industry throughout all the ASEAN member states.

What is the CBT and CBA system and why has it been adopted by ASEAN?

CBT is a way of training that concentrates on what a worker can do or is required to do at work. The aim is of the training is to enable trainees to perform tasks and duties at a standard expected by employers. CBT seeks to develop the skills, knowledge and attitudes (or recognise the ones the trainee already possesses) to achieve the required competency standard. ASEAN has adopted the CBT/CBA training system as it is able to produce the type of worker that industry is looking for and this therefore increases trainee chances of obtaining employment.

CBA involves collecting evidence and making a judgement of the extent to which a worker can perform his/her duties at the required competency standard. Where a trainee can already demonstrate a degree of competency, either due to prior training or work experience, a process of ‘Recognition of Prior Learning’ (RPL) is available to trainees to recognise this. Please speak to your trainer about RPL if you think this applies to you.

What is a competency standard?

Competency standards are descriptions of the skills and knowledge required to perform a task or activity at the level of a required standard.

242 competency standards for the tourism and hospitality industries throughout the ASEAN region have been developed to cover all the knowledge, skills and attitudes required to work in the following occupational areas:

- Housekeeping
- Food Production
- Food and Beverage Service
- Front Office

- Travel Agencies
- Tour Operations.

All of these competency standards are available for you to look at. In fact you will find a summary of each one at the beginning of each Trainee Manual under the heading ‘Unit Descriptor’. The unit descriptor describes the content of the unit you will be studying in the Trainee Manual and provides a table of contents which are divided up into ‘Elements’ and ‘Performance Criteria”. An element is a description of one aspect of what has to be achieved in the workplace. The ‘Performance Criteria’ below each element details the level of performance that needs to be demonstrated to be declared competent.

There are other components of the competency standard:

- *Unit Title*: statement about what is to be done in the workplace
- *Unit Number*: unique number identifying the particular competency
- *Nominal hours*: number of classroom or practical hours usually needed to complete the competency. We call them ‘nominal’ hours because they can vary e.g. sometimes it will take an individual less time to complete a unit of competency because he/she has prior knowledge or work experience in that area.

The final heading you will see before you start reading the Trainee Manual is the ‘Assessment Matrix’. Competency based assessment requires trainees to be assessed in at least 2 – 3 different ways, one of which must be practical. This section outlines three ways assessment can be carried out and includes work projects, written questions and oral questions. The matrix is designed to show you which performance criteria will be assessed and how they will be assessed. Your trainer and/or assessor may also use other assessment methods including ‘Observation Checklist’ and ‘Third Party Statement’. An observation checklist is a way of recording how you perform at work and a third party statement is a statement by a supervisor or employer about the degree of competence they believe you have achieved. This can be based on observing your workplace performance, inspecting your work or gaining feedback from fellow workers.

Your trainer and/or assessor may use other methods to assess you such as:

- Journals
- Oral presentations
- Role plays
- Log books
- Group projects
- Practical demonstrations.

Remember your trainer is there to help you succeed and become competent. Please feel free to ask him or her for more explanation of what you have just read and of what is expected from you and best wishes for your future studies and future career in tourism and hospitality.

Unit descriptor

Coordinate production of brochures and marketing materials

This unit deals with the skills and knowledge required to Coordinate production of brochures and marketing materialsin a range of settings within the hotel and travel industries workplace context.

Unit Code:

D2.TCS.CL5.06

Nominal Hours:

70 hours

Element 1: Identify the context for brochures and marketing materials

Performance Criteria

1.1 Determine the factors that apply to the production of brochures and marketing materials

1.2 Plan the production of items

1.3 Develop action plans for individual brochures and marketing materials

Element 2: Manage inclusions for brochures and marketing materials

Performance Criteria

2.1 Determine the target(s) for the items

2.2 Determine the content for the items

2.3 Determine format and layout for the items

2.4 Determine language for the items

2.5 Determine the prices to be stated in the items

2.6 Determine the copy for the items

Element 3: Administer activities relating to the production of draft items

Performance Criteria

3.1 Provide resources for the production of draft items

3.2 Proof read material

3.3 Circulate items for comment and feedback

3.4 Revise brochures and marketing materials

Element 4: Obtain quotations for production of brochures and marketing materials

Performance Criteria

4.1 Meet and discuss the proposal with service providers

4.2 Provide detailed specifications as the basis for obtaining a quotation for work to be done

4.3 Obtain quotations from a range of service providers

4.4 Evaluate quotations received to make a purchasing decision

4.5 Select the service provider(s) to supply services and lodge official order

Element 5: Administer activities relating to the production of final items

Performance Criteria

5.1 Monitor production activities undertaken by selected service providers

5.2 Ensure payment to service providers, as agreed

5.3 Identify and use alternative service providers where production timelines are not being met

5.4 Proof read material that is produced as final items for approval prior to full production

5.5 Authorise production of final items

5.6 Check items supplied by service providers as final items

Assessment matrix

Showing mapping of Performance Criteria against Work Projects, Written Questions and Oral Questions

The Assessment Matrix indicates three of the most common assessment activities your Assessor may use to assess your understanding of the content of this manual and your performance - Work Projects, Written Questions and Oral Questions. It also indicates where you can find the subject content related to these assessment activities in the Trainee Manual (i.e. under which element or performance criteria). As explained in the Introduction, however, the assessors are free to choose which assessment activities are most suitable to best capture evidence of competency as they deem appropriate for individual students.

		Work Projects	Written Questions	Oral Questions
Element 1: Identify the context for brochures and marketing materials				
1.1	Determine the factors that apply to the production of brochures and marketing materials	1.1	1, 2	1
1.2	Plan the production of items	1.1	3, 4, 5	2
1.3	Develop action plans for individual brochures and marketing materials	1.1	6, 7	3
Element 2: Manage inclusions for brochures and marketing materials				
2.1	Determine the target(s) for the items	2.1	8, 9, 10	4
2.2	Determine the content for the items	2.1	11, 12	5
2.3	Determine format and layout for the items	2.1	13, 14, 15	6
2.4	Determine language for the items	2.1	16, 17, 18	7
2.5	Determine the prices to be stated in the items	2.1	19	8
2.6	Determine the copy for the items	2.1	20 – 24	9
Element 3: Administer activities relating to the production of draft items				
3.1	Provide resources for the production of draft items	3.1	25	10
3.2	Proof read material	3.1	26, 27, 28	11
3.3	Circulate items for comment and feedback	3.1	29, 30	12
3.4	Revise brochures and marketing materials	3.1	31	13

		Work Projects	Written Questions	Oral Questions
Element 4: Obtain quotations for production of brochures and marketing materials				
4.1	Meet and discuss the proposal with service providers	4.1	32, 33	14
4.2	Provide detailed specifications as the basis for obtaining a quotation for work to be done	4.1	34, 35	15
4.3	Obtain quotations from a range of service providers	4.1	36, 37, 38	16
4.4	Evaluate quotations received to make a purchasing decision	4.1	39	17
4.5	Select the service provider(s) to supply services and lodge official order	4.1	40, 41, 42	18
Element 5: Administer activities relating to the production of final items				
5.1	Monitor production activities undertaken by selected service providers	5.1	43	19
5.2	Ensure payment to service providers, as agreed	5.1	44, 45	20
5.3	Identify and use alternative service providers where production timelines are not being met	5.1	46	21
5.4	Proof read material that is produced as final items for approval prior to full production	5.1	47	11
5.5	Authorise production of final items	5.1	48	22
5.6	Check items supplied by service providers as final items	5.1	49, 50	23

Glossary

Term	Explanation
AIDA	Marketing acronym: Attention; Interest; Desire; Action
CRM	Customer Relationship Management
Copy	The words/text used in a brochure
DTP	Desktop publishing
Demographic characteristics	Criteria (such as age, gender, nationality etc.) used to describe target markets/customers
Destinations	Towns/cities visited
Distribution List	List of people an item is to be distributed to giving their name and contact details: only people on this list receive a copy of what is being distributed
e-Purchasing	Electronic (internet-based) purchasing
Idiom	Terms not meant to =be taken/interpreted literally
Inclusions	Things included in a tour/trip
Itinerary	Schedule showing where the tour/travel goes, mode of transport, dates, times, destinations and attractions
Jargon	Industry terminology
KPI	Key Performance Indicator
MICE	Meetings, Incentives, Conventions and Exhibitions
Mock-up	A sample of what is required produced in basic form
PR	Public relations
Plan B	An alternate plan
Proof	Draft/sample of materials to be produced
Proof reading	Reading material/copy to check its accuracy and confirm it is what is required

Term	Explanation
Purchase order	A document produced by an organisation used to support/legitimise the supply of goods and services from suppliers/providers
QA	Quality Assurance
RFT	Request for Tender
SOP	Standard Operating Procedure
Side-tour	Small tour conducted as part of a larger tour
Stakeholders	Others (individuals, groups, businesses, partners, customers) who have an interest/stake in what is happening
Stock	Card or paper used by printers for brochures etc.

Element 1: Identify the context for brochures and marketing materials

1.1 Determine the factors that apply to the production of brochures and marketing materials

Introduction

When brochures and marketing materials need to be produced it is necessary to determine the context they are to be used in as a first step in the process.

This section gives examples of 'brochures and marketing materials' and identifies and examines the factors which need to be taken into account when considering new marketing materials to be produced.

Brochures and marketing materials

The phrase 'brochures and marketing materials' is a generic term referring to any form of items used by a business to promote their travel agency or tour operation business.

Often these items are paper-based but the definition also embraces other items used to advertise and promote the organisation and what it has to offer.

The items may be produced:

- Solely by the business – operating entirely on its own
- As a partnership arrangement with a joint-venture partner – such as when materials are prepared in cooperation with a carrier, destination, attraction or other business
- For the wholesale market – for other businesses, agencies, sales staff and partners operating as co-partners in the industry and advising them of what is available: the materials provided to this sector contains commercially confidential information/detail (prices, terms, facts, figures) not released to the general public
- For the retail market – these are the materials generated for distribution/release to the general public/the paying customers who will buy the tours and purchase the travel.

Examples of brochures and marketing materials

Travel agencies and tour operators have traditionally used the following items:

- Product and service brochures – these are 'general purpose' items which give an indication of (for example):

  - Who the business is, what is does, where it is located and how to make contact with it
  - How long it has been in operation, the quality and credentials of its staff, special awards the business has won and testimonies from happy/satisfied customers
  - All the products available (such as all the different tours and packages) giving sufficient detail (departure dates, names of destinations and inclusions but not giving all the detail of accommodation, side-tours, activities and options) to enable an understanding of the *basics* of the product so comparisons can be made with other products listed in the same document
  - All the services available again limiting information provided just to the generalities but sufficient to give an impression of what is able to be purchased

  These brochures are designed to attract attention and spike the interest of customers so they make further enquiries and/or obtain a copy of a tour-specific or travel-specific item to gain extra detail about the product/service they are interested in.

- Destination guides – these are detailed guides providing information and advice about one (or more) destinations.

  The brochure may cover all the destinations which will be visited on a trip/tour.

  It is designed to create interest and generate enthusiasm for travel.

- Promotional flyers (or 'fliers') and leaflets – these are handbills or circulars commonly (but not always) consisting simply of a single page containing basic information designed and intended:

  - To be relatively inexpensive – these are perhaps the least expensive form of 'brochure and marketing material' created by a business

  - For mass distribution – that is they are handed out to 'everyone' instead of being targeted to a defined market
  - To create attention and raise interest in the topic which if the focus of the flyer/leaflet
  - To direct interested customers to another source for more information – such as a website, an office/agency or a telephone number

- Conference programs, registration/advertorial forms and event prospectus – this relates specifically to advertising aimed at those who are/will be attending events (MICE).

  The materials may be:

  - Integrated into the physical MICE program or prospectus handed out to people who attend – and may entail the tour/travel business paying for the printing of the programs in return for promoting their business and having sole access to attendees via this medium
  - Integrated into the registration forms sent to attendees to pre-register for MICE – thereby gaining direct and targeted access to people who will/might be attending and

may need the products and/or services being promoted by the travel/tour organisation.

- Display material – this refers to items used in the office to display the trips, tours and travel) products and services) the business has for sale.

  They are frequently used:

  - In or at (outside) the office
  - In an agency
  - In the office of a joint venture partner
  - At a sales event – such as a travel and tourism exhibition or to support a stand/display at a shopping centre or some other 'pop-up' event or location.

    They:

    – Need to remain current

    – Must be eye-catching

    – Often need to support a certain sales/marketing campaign

- Information kits – these are develop for various reasons such as to:

  - Give to people who visit displays/stands at an exhibition or some other sales/promotional event – these kits may feature information about the company and generic items on different carriers, destinations, packages, schedules, price lists as well as some lower-grade/value merchandise (pens, pencils, rulers, caps)
  - Provide potential customers with detailed information about an intended trip, tour, destination or itinerary – the idea being to supply more compelling reasons for the people to purchase the ticket (trip, tour/product/service)
  - Supply actual customers (that is, people who have actually bought a product/service) with even more detail and information about the destinations, countries, attractions they are going to see, visit and experience. This is all part of building the excitement and anticipation as well as demonstrating professionalism in terms of customer service.
  - All the above classifications of information kits need revising from time-to-time to keep them current and to change them to reflect the different nature of new and revised trips and tours, carriers, destinations, inclusions, activities and packages being offered/which are available.

- Product support materials – these items are developed to assist users/customers make the most of the products and services they have purchased.

  They are frequently used by sales staff to help *make* the sale but are predominantly intended for use by the purchase so they can:

  - Learn about the product/service
  - Instruct customers on what to do and what not to do
  - Give tips and advice
  - Show diagrams and photos of actual use of products
  - Explain aspects and parts of items
  - Direct people to other sources for even more information or advice.

- Advertising materials – this is a very wide classification of marketing materials.

  Advertising is communication with customers and/or potential customers which is paid for by the business (as opposed to similar communication which is *unpaid* – such as PR).

  Advertising materials can therefore cover things such as:

  - Media advertisements
  - CDs and DVDs
  - Posters
  - Billboards

- Direct mail items – these are items sent directly to:

  - Those who request them
  - Targeted recipients on the company database – when the organisation has a new product/service they believe will be of interest to the individual.

    The direct mail items will generally include:

    – A covering letter explaining the offer/product/service

    – Additional items as appropriate to the nature of the product/service as listed in this section (flyers, information kits, merchandising goods).

- Invitations – these may be sent to people when the organisation wishes to:

  – Make them aware of a new product/service

  – Ask them to participate in a feedback session or focus group

  – Reward them for certain levels of buying/loyalty.

  Invitations may be sent to:

  – Regular customers

  – People who have never bought from the business but have made an enquiry or shown interest/expressed an interest in what is available

  – Individuals, families, groups and clubs, companies, government bodies and the media

- Merchandising goods – this relates to products the organisation produces which:
  - Carry its name/logo
  - Are offered as inducements to make sales

  - Are distributed to promote the company and products/services it offers
  - Are given away to customers who make a purchase – as part of the inclusions for a trip/tour
  - May be available for people to purchase as separate/stand-alone items.

  These need to change from time-to-time as/when:
  - New/revised products/services are developed and offered for sale
  - The organization enters into new partnerships with other businesses
  - Re-branding of the business occurs
  - A new sales campaign starts.

Online information

It is useful to visit the following sites to see more about industry brochures and marketing materials:

- Wholesale travel brochure at http://latitudetravelservices.com.au/wholesale-travel-brochure/
- Brochure at http://en.wikipedia.org/wiki/Brochure
- Producing a tourism brochure at http://businessbreaks.takeabreak.com.au/FrontDoor/LoungeRoom/Articles/TourismArticles/producing-a-tourism-brochure
- How to create an effective travel brochure at http://aspiringbackpacker.com/2012/11/good-travel-brochure/
- Tips for an effective tourist brochure at http://www.offtherack.com.au/effective-brochure-tips.html
- How to make a good travel brochure at http://www.ehow.com/how_6754029_make-good-travel-brochure.html
- Destination guides at http://travelinsider.qantas.com.au/destination-guides-index.htm
- Leaflets and flyers at http://solihull-sustain.org.uk/uploads/leaflets-and-flyers.pdf

Factors which need to be taken into account

The following factors need to be taken into account when considering new marketing materials to be produced:

- Objectives – these will change over time and relate to what the business wants to achieve by producing the brochures and/or marketing materials.

  Examples of standard objectives can be to:

  - Support a specific advertising/marketing campaign
  - Generate interest from nominated markets
  - Encourage responses/queries from potential customers
  - Increase market share
  - Enhance public awareness of the business or a product/service

- Target market/s – these are the cohorts of people/organisations the business wishes to target/attract through the use of certain marketing materials.

  Target markets are commonly based on one of more demographic characteristics such as:

  - Age
  - Gender
  - Income
  - Type of employment
  - Education level
  - Race/nationality
  - Marital status
  - Home country
  - Preferred activity/reason for travel or tourism

- Required type and style of materials – as appropriate to the identified objectives and the identified roles marketing materials will be expected to fulfil when employed by end-users of the materials.

  For example:

  - Some sales staff will require Fact Sheets about destinations while others may want more detail on costs, prices, options and packages
  - Some target market customers prefer to get their information online while others prefer a DVD and other want a hard copy brochure

- Time parameters – this can relate to:

  - Seasonal considerations of trips/tours being offered
  - Dates/times of festivals, MICE and sporting events

- Need for materials to be ready in time to support campaigns and/or products and services being offered

- Budget – there will always be limitations placed on the amount of funds available to generate marketing materials.

  The budget may be:

  - Formulated in terms of cash plus 'in kind' resources – that is, money plus help and assistance from other sources (partners, joint venture associates, other businesses likely to benefit from the overall initiative) in terms of (for example) product, help from *their* staff (advice, market research data, loan of materials and items) and exposure,
  - Specific to one individual/specific marketing initiative or generic to a department, business or campaign.

- In-house production capabilities of the organisation – and associated issues such as:
  - Availability of the capability to focus on what is required at the time required – the internal expertise may be busy working on something else which cannot be re-scheduled
  - Expertise to deliver what is required – most internal production departments have limitations on what they can do in terms of the experience they have, the equipment they own and the technology they have access to.

    An internal marketing production department is no guarantee all required marketing items can be prepared within the organisation.

- Distribution of final materials/items – when marketing items have been produced there is often a need for them to be distributed.

  Considerations in this regard may be:

  - Cost to distribute to all required targets, outlets, clients/customers, agencies, destinations, partners and similar
  - Identification of how materials will be physically moved from printers/production houses to end user destinations such as Visitor Information Centres, other agencies, hotels and identified other locations where the materials are required/need to be sent (locally and internationally)
  - Determination of quantities of materials required in order to accommodate the distribution schedules identified for each item
  - The intermediaries in the distribution chain – for large businesses there can be a need to develop variations on certain marketing materials such that *wholesale* outlets receive a different marketing product to retail offices/agencies who, in turn, receive something different to the end user/customer.

1.2 Plan the production of items

Introduction

Developing brochures and marketing materials is important and therefore needs to be properly planned.

This section highlights the importance of the undertaking and identifies standard activities in the planning process.

Importance of developing brochures and marketing materials

The entire procedure of developing brochures and marketing materials is important because:

- It is a complex activity – there is a lot involved in doing this and getting it right
- It often involves the expenditure of substantial amounts of money
- There is frequently a need to liaise with numerous other business/stakeholders to coordinate the final/finished product
- The end product is an essential sales tool for the organisation and the revenue of the business (and the jobs of the staff) rely on these items to a significant extent
- What is produced must be correct – there is no room for errors or omissions
- All items must reflect the image, standards and reputation the organisation wants to portray for the specific item for a given target market.

Planning

Key in this job must be realisation of the following:

- Planned action always stands a much higher chance of success than unplanned action
- Planning underpins coordination – and developing these items demands coordination with many other people and organisations
- Plans need to be in writing – so others can see them and they can be shared with others for their information, comment, feedback and for them to follow
- 'If you fail to plan, you plan to fail'
- All plans which are developed need to be flexible – plans need to be 'set in jelly and not in concrete'.

Planning activities

The following provides a useful cross-section of the activities which must be embraced as part of the planning process when coordinating the production of brochures and marketing materials:

Identifying what needs to be produced

The basic way of determining the need for brochures and marketing materials is to keep a check of the stock on hand.

Other factors to take into account are:

- Time of the year
- Age/currency of brochures and other materials
- Level of brochures and materials present in agencies and other outlets where brochures and materials are normally available
- Available alternatives
- Special promotions or campaigns being undertaken
- Extent of organisational participation in exhibitions to promote the business
- Extent of sales presentations scheduled for the future.

Analysis of the above should enable identification of:

- Type of items/materials to be produced
- Nature of the items
- Volumes needed
- Dates by which they are required.

Integrating materials produced

It is important the development of brochures and marketing materials does not take place in isolation from everything else which is taking place within the organisation.

After all, the tile of this unit is '*Coordinate* production...'

This highlights the need to:

- Determine and respond to the demands/objectives of other higher level organisational plans
- Ensure the brochures and marketing materials produced assist the organisation achieve its identified goals and objectives
- Liaise with people to track potential future needs of the company so these can be researched *now* for development into products/services *in the future.*

Integration of these marketing-related activities also needs to occur in order to:

- Take advantage of any 'economies of scale' which may emerge when producing materials
- Allow cross-promotion of products/services where appropriate to do so

- Ensure the entire organisation sends a consistent message and portrays a uniform image to nominated target markets
- Make sure brochures and marketing materials are available to support actions being taken by other departments (especially Sales) within the business.

Developing expected outcomes

There can be a need to identify what the brochures and marketing materials being developed are expected to achieve.

This is not always the case, but sometimes it is.

Standard outcomes are:

- Increase or generate sales
- Increase/generate enquiries
- Build database contacts
- Build awareness of the organisation and/or a specific aspect of the business.

It is useful in this context to:

- Whether the *existing* brochures and materials should be re-ordered to replenish exhausted/depleted stock levels

or

- Whether there is another specific focus for the materials and there need to be new materials created.

Where items are being ordered to replenish supplies, the process would be to contact the people who produced the previous items and re-order what is required.

Where there is a new focus for the materials (such as to promote a new product/service, advertise a new package, address a new target market) there is a need to:

- Identify the new focus
- Undertake one or more of the activities presented immediately below. Effectively, a new focus for brochures and marketing materials means 'new' brochures and 'new' marketing materials: the old ones cannot be adapted.

Where changes need to be made to existing brochures and marketing materials, they can be seen as:

- Updates – making minor (small), but important, changes to items; for example, a new telephone number or email address; changing prices
- Revisions – making significant changes to material; for example, changes to the description or photos provided
- Introduction of a new product or service.

A new item may be needed for a variety of reasons, including:

- Addition or removal of products or services
- Development of new items to target new markets
- Production of materials in a new language
- Support for a new promotional campaign
- Inclusion of material relating to an award the organisation has won, or accreditation it has received/achieved
- Changing brochures and materials to reflect a new business image or change of ownership/management.

Identifying evaluation methods

Sometimes there is a requirement to determine in advance what will be used to determine whether or not the brochures and items produced have achieved there expected outcomes or not.

This relates to identifying what KPIs will be used to judge how effective certain brochures/items have been.

Common KPIs are where the objective/outcome was:

- To increase or generate sales:
  - Setting a certain *percentage* increase in revenue
  - Nominating a certain *amount*/target of sales to be achieved
- To increase/generate enquiries:
  - Setting a certain *percentage* increase enquiries from nominated sources (telephone, online, walk-in)
  - Nominating a certain number of enquiries to be received
- To build database contacts:
  - Setting a certain *percentage* increase in numbers for identified target markets/database classifications (as prescribed by the CRM software being used by the organisation)
  - Nominating a certain number of new contacts for a new classification of customers
  - Identifying specific new/updated data required for given database contacts
- To build awareness of the organisation and/or a specific aspect of the business:
  - Setting figures for the numbers of brochures to be given away/taken by the public.

Identifying relevant others

The stakeholders who may need to be included in planning production requirements will vary between organisations and can alter depending on the specific campaign being considered and the individual item being produced.

Those possibly needing to be involved could be:

- Senior or more experienced Sales and Marketing personnel
- Management
- Head office
- Department heads
- Housekeeping – where the venue has accommodation facilities marketing materials are often placed in guest rooms
- Hospitality venues – as targeted by the organisation: such as local hotels
- Agencies with whom the venue has a business relationship
- Airlines, bus/coach companies and other carriers
- Inbound and local tour operators
- Tourist information centres
- Other tourist attractions – many venues are happy to promote their competition by displaying brochures
- Any business, location, or organisation where the venue traditionally places brochures and materials.

Clarifying resources available

Resources refer to:

- Financial resources – the cash/money available
- Human resources – staff/hours available
- Physical resources – equipment, technology and stock
- Information – about business plans and goals, products and services, venues, carriers, destinations and all related topics.

It may be possible resources can be obtained from a variety/mix of sources – such as:

- The host organisation – often (but not always) the primary source
- Joint venture partners
- Carriers
- Destinations and attractions
- Industry groups, associations and bodies
- Government agencies – especially those with responsibility for travel and tourism: they often have dedicated funds available to assist in promotion the country to overseas tourists and travellers.

To identify available resources:

- Talk to management
- Talk with all relevant stakeholders – and be prepared to ask for a contribution (in cash or kind).

Identifying potential problems

The planning process should always seek to identify issues that may impact on developing and producing materials.

The aim of doing this is to identify plans for effectively addressing the issues which have been identified.

There is no comprehensive list of what these may be but the following is an indicative list:

- Absence of sufficient funds
- Clash of demand on personnel required to participate/contribute
- Limits on availability or presence of required information/data
- Timelines for production are too tight or unrealistic.

1.3 Develop action plans for individual brochures and marketing materials

Introduction

Development of action plans for the development of individual brochures and marketing materials is SOP for the industry.

This section examines the creation of such plans.

Need for individual plans

Action plans are needed for each individual item to be produced because:

- The needs of each item (content, prices, information, dates, times) are usually different
- The factors (budget, timelines, quantities required) impacting each item vary
- Individual plans enable better control and optimise the likelihood of a more effective/successful outcome
- Different items are often produced by different external providers – so a plan for each product facilitates more effective management of the process for each item
- This allows better tracking of progress
- It enables more efficient management of resources for each item
- This approach supports better evaluation of outcomes.

Individual action plans

Considerations which have emerged as relevant to the development of action plans in this regard include:

- Identifying, detailing and clarifying individual steps to be undertaken in the development and production phases – these may include:
  - Determining stakeholders
  - Working out content and objectives
  - Settling timelines
  - Producing KPIs
  - Allocating roles and responsibilities
- Allocating resources to the development and production phases – in terms of:
  - Individual internal staff and the work they are expected to undertake
  - Allocation of labour/hours to the project/plan/item
  - Working out needs and requirements
  - Canvassing all types of resource needs (financial, human, physical, information)
  - Sourcing supplementary/complementary funding

- Identifying individual responsibilities – for:
  - The activities necessary as part of the pre-development phase
  - Work needed in the production phases
  - Internal and external people
- Specifying parameters for the plans – in terms of:
  - Timelines and target dates for the completion of components of each plan
  - Quality standards and criteria
  - Costs/expenditure
  - Hours worked
- Incorporating relevant data – which may require:
  - Referring to previous marketing activities as a basis for future marketing activities
  - Seeking input and comment from relevant stakeholders as appropriate to individual project requirements
  - Generating new market research data
- Communicating the contents of action plans:
  - With relevant stakeholders – to keep them informed and seek their feedback/comment
  - To explain specific requirements and responsibilities that apply
  - So those with roles and responsibilities under the plan are aware of what they are expected to do, when they are expected to have it competed and the standard that apply to the work they have to do.

Factors influencing considerations

The extent to which each of these will impact/influence the process will vary considerably based on:

- The urgency associated with producing each item – the timelines which apply
- The focus of the item – in terms of whether it is as critical/central element of a campaign or merely a peripheral item supplementing something bigger
- The amount of money involved – the more money involved, the greater the need for detailed planning
- Previous experience with the same thing/similar items.

Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

Please note: this Work Project forms the basis of other Work Projects.

1.1 To complete the requirement of this (and the other Work Projects in this Unit) you are asked to **name and describe** one travel or tourism business which will form the basis for all the Work Projects.

For this Work Project you are to use the identified organisation as the focus for identifying the context for two marketing brochures and one other item of marketing merchandise providing evidence of your ability to:

- Determine the factors which apply to the production of these three items
- Plan the production of the three items
- Develop action plans for their production.

Summary

Identify the context for brochures and marketing materials

When identifying the context for brochures and marketing materials:

- Identify the options available for marketing purposes
- View a range of materials produced/used by other similar organisations
- Be sure to understand what the materials are being expected to achieve
- Take into account the target market/s at which the materials will be aimed
- Always be aware of limitations and budget/resource constraints
- Factor in the need to distribute the materials
- Take time to research and develop what will work
- Check to see if the materials can be integrated with other initiatives
- Determine how to evaluate the effectiveness of materials produced
- Involve others and seek their input and opinion
- Plan the production – this does not just 'happen'
- Develop action plans for each item.

Element 2: Manage inclusions for brochures and marketing materials

2.1 Determine the target(s) for the items

Introduction

One of the first steps in working out what is to be included in a brochure and/or marketing materials is the need to determine the target for the individual items.

This section (which should be read in conjunction with the information on target markets in section 1.1) looks at who/what these targets may be.

Who might the targets be?

Context

'Targets' refers to 'target markets' as defined by the individual organisation and these definitions vary between operators.

It is important to note:

- There is no limit to the type/nature of targets
- A brochure/marketing item may be targeted at one or more than one market/target
- The anticipated/expected outcome for the item need to correspond to what is produced and to align with the target (market) the item is aimed at
- Market research data should guide/govern production – in terms of (for example):
  - How markets prefer to receive their information
  - What they want/need to know.
- Target markets for are likely to change over time as the organisation grows, expand their business, introduce new products/services.

  In reality a business may seek to:
  - Expand the number of target markets it has – to capitalise on an identified opportunity, to cater for an emerging trend, to capture additional market share, to enter a new market or to respond to data uncovered by market research
  - Reduce existing target markets – where it has identified a declining and unprofitable previous target market, or where it seeks to alter its image by moving *out* of an existing market.

Examples of targets

Target markets are specific groupings of customers targeted by the organisation to whom they wish to make sales.

Businesses that adopt a marketing approach specifically set out to attract a number of different target markets. This means they know, quite definitely, who it is they want to attract.

When a business knows who they want to attract (on the basis of the market research they have done and the objectives of the organisation and/or specific departments within the business) this means they have a much better idea of how to get their marketing information to these people/groups, and what their wants, needs and preferences are.

Remember a business can/will have *many target markets* and the description of each may vary widely between different organisations within the same industry sector.

Generally speaking 'demographic characteristics' are used to define and differentiate target markets.

Target markets can be people (such as individuals or families) or businesses (such as corporate clients, schools, carriers). They can be domestic or international.

The only criteria is each target market can be differentiated, one from another, by the way in which they are described/identified.

Target markets will commonly relate to the following (with obvious differentiations between individual operators – please note the examples listed below are indicative only of the characteristics which might form the basis of segregating/defining markets and the list is not intended to be comprehensive or exhaustive):

- Internal users – this refers to items aimed at:
  - Sales staff working within the business
  - Middle men in the sales process
  - Joint venture partners
  - Agencies working with/on behalf of the organisation
  - Operational staff
- Media – in order to:
  - Provide information for publicity articles
  - Generate interest in an initiative
  - Support advertising efforts
- Local people – who may be further categorised into sub-sections such as:
  - Individuals
  - Groups, clubs and associations
  - Families
  - Business people

- International customers – who may be divided/classified by (a combination of factors) such as:
  - Country
  - Reason for travel
  - Gender
  - Age
- Personal interests – which may give rise to classifications/distinctions such as:
  - Action tourists – those seeling excitement and action
  - Medical tourists – who seek operations of various types
  - Historical tours – focussing on history and wars
  - Experiential tourists – who want to immerse themselves into the experiences and culture of different regions/countries
  - Food and beverage tours – where the emphasis is on local foods, cooking, drinks and eating/dining facilities
- Previous users – this is any person or organisation who has used the services of the business before.

Remember: the above are only a selection of the many, many different classifications which can exist in the industry for identifying/classifying/segregating 'target markets'.

How are targets identified?

Ways to identify the target/s for items include:

- Talking to management – to get their input
- Talking with relevant stakeholders – to obtain their comment and to coordinate and align organisational items with items they may be producing
- Referring to relevant plans – to identify the targets as described in those documents which will indicate the direction the business wants to take in this regard
- Analysing market research data – to identify emerging markets and to refresh knowledge regarding changing and/or ongoing requirements as they apply to existing/established markets.

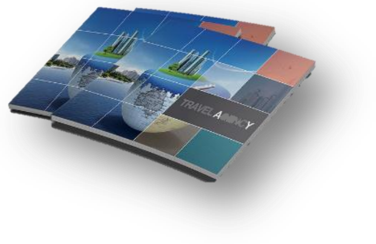
Online information

It would be beneficial to visit:

- 'ASEAN Tourism Marketing Strategy 2012-2015 (especially Chapter 3) at http://www10.iadb.org/intal/intalcdi/PE/2012/10151.pdf
- 'Tourism Australia: our target market' at http://www.tourism.australia.com/markets/our-target-consumers.aspx
- 'Tourism Australia: youth' at http://www.tourism.australia.com/markets/youth-markets.aspx
- 'Tourism Australia: market regions' at http://www.tourism.australia.com/markets/market-regions.aspx
- 'Newfoundland Canada, Dept of Tourism, Culture and Recreation 'Target markets' at http://www.tcr.gov.nl.ca/tcr/tourism/tourism_marketing/target_markets.html

2.2 Determine the content for the items

Introduction



When the targets for specific brochures and marketing items have been agreed on the next step is to determine the content for each item.

This section identifies considerations in this phase of development.

Important point

It is vital to understand:

- Some materials will be generic in nature – this means there will be *little* in the way of *specifics* in terms of promoting a nominated trip/tour, or a certain product or service.

  This will apply to items such as:

  - Travel bags
  - T-shirts
  - Key rings
  - Pens
  - Luggage tags
  - Give-away merchandising items
  - Any item intended for the mass market

  The content in these cases will just concentrate on:

  - Providing an overview of what the organisation does/provides – such as:
    – Highlighting the business in travel, tours, trips or other identified major/priority products and services
    – Emphasising the name of the company – which often also includes their primary focus ('Atlas Tours', 'Worldwide Travel')
  - Giving the basis contact details for the business – in terms of:
  - Street address
    – Web address
    – Telephone number
- Other items will demand a *high-degree of focus* and emphasis on a given product or service – or a selection of nominated products or services.

  This is the case for items such as:

  - Tour brochures
  - Destination information
  - Travel services
  - Individual products.

For example

Travel bag

The content on a travel bag may be quite simple/basic, consisting of:

- Name of the organisation
- Logo
- Web site address.

Conference programs, registration/advertorial forms

Information included on Conference programs, registration/advertorial forms and event prospectus will be limited due to the restricted space available to promote the business so primary content only will be mentioned, such as:

- 'This event is sponsored by XYZ' or a similar statement of support for the event/conference
- Name of the organisation
- Brief description/overview of the services provided
- Street addresses
- Telephone numbers
- Web site.

Destination Guides

The content of Destination Guides will usually be generic in nature but include tailored information to suit the identified needs, wants and preferences of target markets the Guide is being pitched at.

Information will focus on:

- History and culture of the destination and/or country
- Weather information/overview
- Currency details
- Customs and visa information
- Photographs of attractions, interesting sites, landmarks, popular precincts
- Local map and local transport
- Time zone
- Electricity information – for domestic/personal appliances
- Country telephone code and city code/s
- Highlights – in relation to sporting events, religious festivals, seasonal occurrences
- Suggestions for walks and activities – specific to the target market/s.

Important considerations

When determining content for brochures and marketing materials, the following need to be taken into account and accommodated:

- There needs to be identification of the exact nature of all the *products and services* to be targeted in the material – this is the case where materials are being developed to promote one or specific trips or tours, or one or more services the business can provide.

  This means detailing:
  - Names and costs of products and services
  - Relevant times and dates
  - Inclusions
  - Packages
  - Terms and conditions
- Alignment with stated objectives for the organisation and/or individual departmental or operational plan – this means ensuring what is written, included or otherwise indicated in or on the materials/items:
  - Matches the direction the business wants to take
  - Helps the business achieve its strategic and business goals
  - Targets the people who are in the identified target market/s
  - Maintains the required image and reputation of the organisation
- Physical inclusions must be addressed – for example:
  - All the Style Guide specifications for individual item need to be complied with – these requirements will be presented in the Style Guide for *all brochures* and *all marketing materials* produced by the business.
  - The specifications will differ between items in relation to matters such as:
    - Use, size and position of logos on physical items (merchandise) and on brochures and other paper-based materials as well as electronic formats
    - Font – see next section
    - Use of colour – stipulating what colour is to be used and in what position: many organisations have a colour scheme they include in all their materials in order to enhance and extend brand recognition
    - Material to be used as basis for each product/item being produced – this dictates the type of paper, card or stock to be used for print-based materials as well as the material (by ingredients, quality and other relevant indicators as appropriate to the individual item) to be used for merchandising items
    - Type of, positioning and size of graphics, art work and photographs – so there is balance of appearance and restrictions placed on what can and cannot be used in this regard

- There is a need to provide information which has been identified as being required by/important to the identified users of the items – this may have been determined as a result of verbal feedback, focus groups, market research or as a result of input from staff who have spoken with tour group members/travellers, or contributions from joint venture partners
- Mandatory inclusions – this relates to making sure all compulsory inclusions as determined by management are included in the brochures/marketing materials. In practice this will often relate to:
  - Need to include nominated statements on certain documents/items such as:
    - Mission statement
    - Vision statement
    - Value statement
  - Contact details – detailing how this is to be given for each item. Presentation of the phone number for an international audience will be different to the telephone number given to a local market
  - Affiliations the business has with nominated other organisations, agencies, carriers, associations, industry groups/bodies
  - Indications the organisation aligns/complies with and/or subscribes to identified QA schemes or industry schemes, or Codes of Practice.
  - Details of nominated guarantees and/or warranties offered by the operator
  - Terms and Conditions of the organisation
- Input from all relevant stakeholders – in this context this means seeking and accommodating (as/where appropriate) contributions from:
  - Internal personnel and the different departments within the larger organisation
  - Sub-agents and joint venture partners
  - Related carriers and major attractions, destinations and third party providers.

More information

Additional information can be obtained from:

- 'Marketing content for brochures' at http://mywebwriters.wordpres.com/2011/08/29/marketing-content-for-brochures/
- 'How to Write a Brochure Your Customers Will Want to Read – The Brochure Copywriting Cheat Sheet' at http://www.text-centric.com/brochure-copywriting-cheat-sheet/
- 'Brochure content writing' at http://dorightmarketing.com/tag/brochure-content-writing/
- 'Brochure marketing: 12 tips on how to do it effectively' at http://marketing.about.com/od/directmarketin1/a/brochmktg.htm
- 'Marketing tips and trips: Brochures' athttp://www.smallbusiness.wa.gov.au/TourismBoost/marketing-tips-and-tricks/brochures/ .

2.3 Determine format and layout for the items

Introduction

Managing inclusions for brochures and marketing materials require determination of format and layout for the items.

This section discusses many of the important points to be taken into account when working out exactly how a paper-based brochure/marketing item will look.

Clarifying terminology – 'format'

It is possible for the word 'format' to have two meanings in common usage:

- First – it can mean the underlying basis of the item.
- For example, advertising/promotional/marketing material can come in several formats – it can be:
  - Paper-based (such as brochures, flyer, mail-outs, newspaper and magazine adverts and hard copy schedules, price lists and itineraries)
  - Electronic – such as SMS texts, websites, Facebook posts, blogs or tweets
  - Merchandise – such as travel bags, caps and T-shirts.
- Second – it can refer to the formatting of a page.

  This includes the layout of the page (that is the physical position of items on a page) but also includes several other features of what appears on the page such as:
  - Fonts which are used
  - Choice of font sizes
  - Whether photographs are used or whether pictures/graphics are used
  - Selection and use of colour.

This section relates to the second of these definitions/interpretations.

Fold options

A main requirement is to determine the page layout/format for the item. Basic options are:

- Using multi-page brochure – stapled or bound in some way.

  Most A4-sized marketing materials are produced in multiples of four, due to the rolls of paper commonly used by printers, and are therefore generally 8, 12, 16, 20, 24, or 28 pages long.
- Selecting single unfolded page leaflets
- Electing to use a single page which is folded in one of several ways traditionally used for promotional materials – these include:
  - Half-fold/bi-fold
  - Tri-fold
  - Accordion fold

- Z-fold
- Accordion fold
- Quarter fold
- Gate fold

See 'Brochure templates' at http://www.brochureprinting.com/brochure-templates.html

Font type and size options

There is always a need to determine the font to be used throughout or in defined sections of the items.

Generally:

- Type face and size will change for text/copy at different physical locations on/in each brochure and marketing items
- The Style Guide will govern what is used
- The font type should relate to the target market – for example:
  - Traditional typefaces for traditional markets (Arial, Helvetica, Calibri, Verdana)
  - Items aimed at younger/active/adventure seeking target markets may feature typefaces which are more 'creative'/different (Mistral, Freestyle Script, **Impact**)
- The font may be chosen to reflect the nature of the trip/tour being promoted – for example a product such as a 'romantic get-away' might use French Script or *Monotype Corsiva* or Lucinda Handwriting
- Attention needs to be paid to legibility – type faces selected must (usually) be easy to read so customers can quickly scan the materials and obtain the information they need and the detail the organisation wants to convey
- Font size will:
  - Be dictated by the Style Guide in many cases
  - Vary between locations/positions in the item in order to:
    - Introduce difference in appearance
    - Help differentiate segments of information
  - Change to suit 'available space' – where there is lots of white space/room then type sizes can increase, and where room is scarce there is often the option of decreasing font size.

Colour

While most materials will seek to convey the standard 'colours of the company' there is also a need to determine the use of colour in individual brochures.

This point forces consideration of black and white, limited colour or full-colour options.

It is important to realise colour costs money.

Black and white is cheapest, a limited number of colours (two or three) is next and the most expensive is full-colour printing.

The more colour used, the more expensive the end price

Before deciding on colour for brochures it is useful to ask:

- What will the use of colour achieve?
- How many colours will be needed to create the desired effect?
- Is the cost of full-colour printing within budget?
- Does use of colour align with objectives and intentions for ***this*** product?

It is also important/necessary to take into account the paper on which the final product will be printed – for example lighter paper is slightly cheaper, but the quality of print material can become bad because colour can 'bleed' through the thin pages.

Key points are:

- Full-colour or four-colour printing (that is, colours derived from the four primary colours) is the most expensive choice; however, it will generally create a more lasting impression.
- One-, two- and three-colour printing can also be used effectively. If the budget will allow only one colour, remember there are numerous **shades and hues** for each colour so (in reality) this expands available colour options.
- The nature of the industry is such that colour needs to be used in all/most marketing materials.

Length of the finished product

Length of the final item in term of number of pages will be determined by a combination of factors such as:

- Input stakeholders want to make – the desire/need for stakeholders to contribute nearly always has to be accommodated
- Budget – in relation to:
  - Production – lengthier items are more expensive to produce
  - Distribution – bigger/weightier items cost more to mail or send out
- Market research about the amount of detail customers/consumers want – some items will seek only to give brief pieces of information while others will be produced to supply extra/comprehensive details
- End use of the item – for example, some promotional materials will be required to be single page, bi-fold or tri-fold where they are to be included in/added to a pre-existing range/rack/stocking and display option of other advertising items (such as in a pre-existing facility in a hotel lobby or a Visitor Information Centre).

  When deciding on the format and size of print material, make sure it is appropriate for purpose and easy to distribute. For example, make sure the final product fits easily into brochure display stands or they can be mailed out in standard size envelopes.

A standard size leaflet such as A4 folded down to one third A4 (gatefold) is easiest to use as it fits into standard brochure racks and envelopes.

Stock size, quality and colour

Stock size, quality and colour will depend on:

- Demands/requirements of those who are going to display the item – see above
- Type of product/item being developed – for example, there are certain higher expectations of quality for a brochure that do not exist for a flyer
- Overall 'look' to be achieved by the item
- Traditional/non-negotiable requirements of the organisation and stakeholders involved in the initiative
- Budget
- End-use of the finished product – if the item is to be used by staff inside the business or at another organisation/agency then the emphasis must be on practicality and 'useability' of the item rather than 'show and appearance'
- The theme of the product/service – there needs to be a resonance between *what* is being promoted (in terms of quality, value, reliability and other emotional criteria/factors) and the *way* it is promoted.

Positioning content

Work here relates to positioning text, graphics, photographs on the stock or marketing item and involves activities and considerations such as:

- Enabling sufficient space for required text and information – this is important to ensure:
  - Items do not look too cluttered or 'busy'
  - There is enough space to communicate what needs to be communicated
  - The type face is legible and is not too small
- Sequencing of material in a logical manner – so it is easy-to-follow/find or otherwise presented in a *planned* order

- Liaising with internal and/or external professionals – these are people with experience and expertise in brochure design and development and include:
  - Graphic artists – it is always good to get their input about layout
  - Printers – where materials have to be printed by an external printer it is vital to meet with the printer and see what they have to offer and find out what they suggest in terms of what is needed
- Applying basic design principles for brochures and other items – this is often a matter of taste/personal judgement and subjectivity and relates to topics such as:
  - Aesthetic appeal
  - Harmony of content

- Flow and sequencing of information and content
- Balance of the final product/page
- Spacing between lines, paragraphs, tables, information, sections and so on
- Hierarchy of headings/sub-headings
- Cover shots and other 'visuals'.

Online information

More information is available from:

- 'Ready-made free design templates' at http://www.stocklayouts.com/Templates/Free-Templates/Free-Sample-Brochure-Template-Design.aspx
- 'Make an impression with colourful brochures' at http://www.stocklayouts.com/Templates/Brochure/Brochure-Templates-Designs.aspx
- 'Brochure layout template' at http://all-free-download.com/free-vector/brochure-layout-template.html
- 'Layout of a promotional brochure' at http://www.vtaide.com/gleanings/BrochureLayout.htm
- 'How to design brochures' at http://www.wikihow.com/Design-Brochures.

2.4 Determine language for the items

Introduction

All brochures need decisions made about the language to be used.

This section identifies relatively few but significant issues in this regard.

Which language?

The most basic decision to be made about brochures and items is about the language to be used.

The language must be appropriate to the user/target market and in lots of cases this can mean using a 'foreign' language.

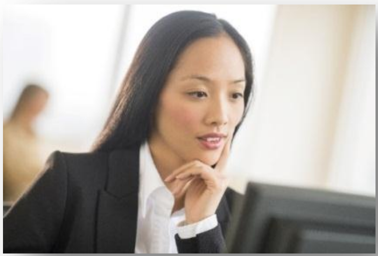
There is little point producing a magnificent brochure if the people it is aimed at are unable to read and understand it.

If the target market is English-speaking then the item must be written in English.

Indeed, in some cases the only change that needs to be made to some marketing materials is for there to be a translation of existing materials into another language. This means some organisations have the same brochure but produce it in six or seven different languages.

Where a foreign language is used it is ESSENTIAL a person whose mother tongue is that language is employed to proof read and amend the draft version of the item before it is approved for final printing in order to avoid unintended linguistic gaffs.

Idioms and terminology



Words and phrases used in marketing materials are extremely influential in conveying meaning to readers but they must be correct and they need to be appropriate to the reader/target market:

- Using local idiom can be a positive thing to do for local readers but confusing and meaningless to those from other countries and cultures.

  For example:

  - If the brochure reads 'You will be over the moon when you take one of our cruises' will readers understand this does not mean the ship is sailing past the moon?!
  - An Australian would understand if the brochure stated 'Come to Vietnam and we will give you the drum about our food' (meaning we will tell you all about the great local food)
- Using idiom of other countries is fraught with danger – as there is always a real danger:
  - It will be used in the wrong content/inappropriately – and give the impression the business is 'out of touch' with the very country/culture it is trying to connect with
  - Of using sayings which are out-of-date and no longer in common usage
  - Of including phrases not commonly used by the target market who the brochure is being aimed at

- Using local terms is also something to be undertaken with care where the audience is not local – this is not to say local terms are to be avoided but they must be:
  - Explained
  - Put into context
  - Used sparingly.

  Local terms can be used as/wherever needed when marketing materials are aimed at locals but if the readers are foreigners the use of 'too many' local terms has been shown to:
  - Confuse the reader
  - Produce negative feelings about the material
  - Fail to fully describe/convey what is intended to the target.

Jargon

Jargon is:

- Industry terminology specific to a certain industry type/sector and understood (generally) only by those in that industry
- Terminology, words, phrases and/or abbreviations used by an organisation and not commonly understood by anyone outside the organisation.

The following 'rules' apply to the use of jargon in marketing materials:

- Avoid it – for use where the target is 'the public'.

  If it is deemed necessary to use jargon in a marketing item aimed at any public/target market it needs to be explained – never assume the reader:
  - Knows what it means
  - Will interpret it the way the material wants/needs it to be interpreted
- It is customary to use accepted industry terms and abbreviations for 'internal' marketing materials – this means it is acceptable to use jargon in documents:
  - For use by organisational staff such as sales staff, members of the marketing department, consultants and counter staff
  - For use by employees at other branches, agencies, intermediary organisations or support service providers.

Extra reading

It is worth taking the time to read the following:

- 'Travel jargon: what hotels say vs. what they mean' at http://travel.cnn.com/explorations/life/deciphering-travel-marketing-lingo-911627
- 'Why you should avoid jargon in your business brochure' at http://www.swallowtailprint.co.uk/news/articles/post/34-why-you-should-avoid-jargon-in-your-business-brochure
- 'Hotel industry jargon buster' at http://www.cms-cmck.com/Hubbard.FileSystem/files/Publication/50afd4a2-e2aa-4f0c-87be-073ab6b6a63f/Presentation/PublicationAttachment/b19a0c04-85a1-4106-8011-07c8ae8bcb51/HotelsJargonBrochure.pdf.

2.5 Determine the prices to be stated in the items

Introduction

Many marketing materials will need to have prices included in them.

This section looks at the need to get this important aspect of the items correct.

Context

In the context of this unit this section does not relate to:

- Actually calculating the selling prices to be listed in brochures
- Determining what the prices listed in materials should be.

This is the responsibility of management or a mix of financial personnel/accountants and the marketing and sales departments.

Considerations relating to price

When including prices in any form of marketing materials it is important to:

- Ensure the accuracy of prices quoted – this means making sure the prices listed are the prices that should be there.

  It means double-checking to ensure (for example):

  - Figures have been correctly copied from the original/source document
  - No figures have been accidentally transposed – so 915 has not become 195
- Ensure prices listed are comprehensive – in practice (because it is illegal and unethical to be misleading and deceptive) this means:

  - All prices and charges should be listed – if the traveller/purchaser is going to be levied a charge/fee for anything it should be listed.
  - There should be no 'surprises' after the initial decision to purchase has been made.
  - Prices/charges imposed by other businesses or government agencies should be listed as such
  - A decision may need to be made about whether selling prices are 'flagged' or 'final':
    - 'Flagged' means a listed price is flagged with an asterisk (*) indicating other fees and charges apply (such as taxes, transfers and potentially a host of other on-costs)
    - 'Final' means the quoted price is inclusive of all fees and charges and the buyer has nothing else to pay
- Ensure time limitations for stated prices – this means including a statement in the brochure indicating prices, tariffs and similar are valid only until a stated date

- Determine organisational requirements regarding need to include a statement highlighting prices and charges are subject to change without notification – this can be a standard inclusion in most/all advertising materials
- Incorporate prices relevant to the specific target audiences of the brochures or marketing materials – this means:
    - Including details for sales staff and agencies appropriate to their needs – such as wholesale prices, commissions, available discounts for trade audiences but not for retail customers
    - Stating retail process for end-users
    - Varying prices where materials are being generated for different segments (sub-sections) of certain target markets – for example, the 'local' target market maybe differentiated into 'corporate', 'clubs and groups' and 'families' with each group having a different price point
- Ensure the currency used in the items is relevant to the language being used and/or target market audiences or destinations – the price stated/listed needs to 'mean something to those who read it.

  Using Rupiah, Dong, Singapore dollars or Ringgit may mean a lot to those who produce the materials but is likely to mean nothing to the people it is pitched at: all prices should be:
    - Given in local currency
    - Converted to the currency of the country of the target customers – meaning there may be a need to list prices in five or six currencies.
- Highlight the value-for-money represented by the price being charged – by referencing:
    - Unique nature of the offer
    - Special features being offered
    - Items/inclusions of the package
- Verify with management prices to be included in items are correct – as part of standard procedure for proof reading and authorisation to proceed to printing and distribution.

  It should be mandatory for management to sign-off on all items at these stages.

2.6 Determine the copy for the items

Introduction

The ‘copy’ for the items refers to the words written in the brochure.

This section examines a range of important issues to help generate compelling and effective messages.

Style Guide

Section 2.2 introduced the role of organisational Style Guides and at this stage it is necessary to repeat the requirements of these Guides must be followed when producing advertising/marketing materials unless specific advice to the contrary is given and approved by management.

As has already been indicated these requirements will dictate requirements in relation to:

- Headings
- Headlines
- Headers
- Footers
- Font types
- Font sizes.

Copy style

It is worth remembering the words and images used in brochures get the attention of a potential customer within the brief **two to three seconds** their eyes focus on the headline, picture, or cover page when they browse a brochure display.

The headline, headings, sub-headings and photos are often the first point of contact between the brochure and the customer and is important because it:

- Creates an impression
- Sets the scene
- Creates expectations.

Headlines are all about attracting attention and they must link to the first sentence of the body of the copy.

It can be worth starting with something different, or a surprising fact, rather than a standard introduction – be prepared to be different.

The writing style chosen needs to fit with the objective of the brochure. The most commonly used writing styles are:

- Factual
- Imaginative
- Authoritative

- Whimsical
- Contemporary
- Emotional.

The one writing style can be used for the *entire brochure* or a combination of styles may be used throughout the item: many brochures alter styles depending on the focus of the description for individual points/sections.

For example, a brochure for a zoo may adopt a ‘learning’ style; a brochure for a sports venue may use an ‘action’ orientation; a brochure for a theme park would feature a ‘fun’ style and descriptions for cultures, religion and wars would more respectful and objective.

AIDA

It is common practice for Sales and Marketing departments to apply the AIDA principle when developing brochures to make them more effective.

A = grabs Attention

This highlights the need for the brochure to:

- Catch the reader’s attention and get them to pick up the brochure
- Make the reader open the first page
- Make the reader keep reading the brochure until all the information is absorbed.

I = appeals to the peoples’ self-Interest

This means:

- The brochure must *look* interesting to the reader
- The brochure must *be* interesting to the reader
- The brochure should be easy to read and understand.

D = arouses the Desire to buy

Keys at this stage are:

- The brochure needs to make sure the reader distinguishes what is being offered from other offers or similar offers
- The brochure should demonstrate why the organisation and what it is offering is better than or different to what the opposition is offering
- The brochure should persuade the reader to agree that ‘it’ (what is being offered/promoted) is the only one for them.

A = urges people to take Action

This means the brochure has to:

- Explain what the potential buyer needs to do in order to take the next step – for example:
  - ‘Call now for more information’
  - ‘Visit our website’
  - ‘Phone for free quote’
- Make this important step as simple as possible for the customer to follow.

Advice on writing copy

The following points provide tips on writing copy:

- Read lots of other brochures from a range of other businesses – to get a feel for what they include and how they write
- Write to an identified customer (the target customer/group as determined by the objective/s for the brochure) in ordinary everyday language – read what is written out loud to check if it flows smoothly

  More persuasive copy will be written if there is one typical reader in mind. This will help in 'speaking' to them.

  Use words the reader might like to read.

  For example:

  - Parents will like to see words such as 'fun', 'educational', and 'safe'
  - Younger people can respond best to words such as 'exciting' and 'full of action'
  - Older travellers want to read about 'safety', 'security', 'established' and 'traditional'
- Identify one key message the brochure is to carry – for example the key message might be:
  - Quality
  - Relaxation
  - Experiential
  - Value-for-money.
- Note the benefits to be sold – and think about the reasons the typical reader might want to come to buy.

  What is it that will motivate the purchase of the product/service? Perfume manufacturers do not sell smell – they promise romance. Car advertisers do not sell a means of transport – they offer excitement or a very powerful, manly image. Theme parks do not sell rides and games – they offer an experience.

  This highlights the use of trigger words (words that carry special ideas or feelings) – such as:

  - 'Free'
  - 'Fun'
  - 'Exciting'
  - 'New'
  - 'Safe'
  - 'Unique'
  - 'Save'
  - 'Extra'
  - 'Limited offer'
  - 'Special'

- Do not crowd the brochure with words and explanations – the best copy is often the shortest: 'less is more'

- Use the word ‘you’ – this instantly grabs attention and really personalises the message/communication.

  Readers identify with it and instinctively assume it means them.

  Sentences should be turned around to make them more appealing, for example:

  - ‘All our tours are exciting, fun and safe’

    should become

  - ‘You’ll be able to enjoy the fun and excitement of our tours in total safety’.
- Use questions – using questions helps to involve the reader, particularly if the answer is almost certainly ‘yes’, for example:
  - ‘Wouldn’t you just love to escape the pressures of everyday life and spend a day thrilling your senses? XYZ offers the perfect opportunity to live life as you thought it should be’.

  The benefits and features offered are the real reason people will buy.

  If prospects read ‘You’ll feel challenged and exhilarated, enjoying a true family experience at XYZ’, they would be even more likely to purchase.
- Avoid using long passages of text – loads of print appears dull and uninteresting.

  Short everyday words, short paragraphs, and short sentences are easier to read.

  Short sentences have more impact – remember it is brochure that is being written and not a book.
- Consider a slogan – a slogan is a brief message with an idea or image that people can instantly recognise, relate to and understand/form a connection with.

  If the organisation (or a destination or attraction) has a slogan, it is usual for this slogan to be included on all promotional materials, including brochures.

  Examples may include:

  - ‘XYZ zoo – fun in learning’
  - ‘XYZ park – challenge yourself!’
  - ‘XYZ museum – take a step into the past’.

  Successful slogans aim to:

  - Create a ‘brand’ name
  - Describe the product or service available
  - Create or support a recognisable image.
- Include a map – to show relative locations, landmarks and distances
- Be sure to include ‘required’ information from joint venture or sponsorship partners – there are often expectations (or contractual requirements) to include certain statements or other inclusions (logos, facts, details) from stakeholders
- Include statements the organisation insists are included on all brochure materials – these may include words to the effect of:
  - ‘Offer valid until XX/XX/XX’
  - ‘Prices subject to change without notice’ – this allows brochures with prices to continue to be used even where there have been price increases

    - 'Some attractions and inclusions may be unavailable due to weather conditions, maintenance or other causes'
    - 'Information contained in this brochure was accurate at the time of printing'.
- Confirm all material written is either copyright free or copyrighted material has been granted permission for use – never copy anything directly from another source without getting permission to use it.

  Most brochures produced are covered by copyright, so a business cannot legally copy text and photos found in other brochures from other organisations and use them in their own.

  Note, too, most of the information on the Internet is also covered by (inferred) copyright or express copyright.

  The © symbol indicates material is protected by copyright, but there is **no legal requirement** for this to be present for the work to be covered by copyright protection.

  The message is simple: do not copy someone else's work and use it as if it is original work – because it can be an offence.
- Use/consider photographs – photographs can be used for different things/in different ways.

  Photographs of customers/visitors are common in brochures and are used to:
    - Encourage identification by potential customers who recognise the service or product is being targeted at their age or social status group
    - Reinforce benefits (fun, safety, excitement, a family experience, action) being offered
    - Create expectations.

  Photographs of the environment are used to:
    - Validate claims made in the text about the existence, quality, safety of a particular aspect of the trip, tour or destination
    - Create a sense of atmosphere/ambience
    - Motivate and inspire the viewer to come or seek further information.

- Tell the truth – be creative but always remain honest. It is acceptable to embellish but not to tell deliberate untruths
- Write a draft – and be prepared to revise and re-write many times

Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

Please note: this Work Project follows on from the previous Work Project and forms the basis of other Work Projects.

2.1 For the three items identified in your response to Work Project 1.1 you are required to manage inclusions for the brochures and the marketing item providing evidence you can:

- Determine the target market/s for each item
- Determine the content for each item
- Determine format and layout for each item
- Determine the language for each item
- Determine (as/where applicable) prices to be included in each item
- Determine copy for each item.

Summary

Manage inclusions for brochures and marketing materials

When managing inclusions for brochures and marketing materials:

- Identify and describe the markets being targeted
- Match content and means to the market/s
- Realise there can be many and diverse markets
- Spend time determining exact content
- Align content with identified market need and organisational objectives
- Use a format and layout appropriate to the item and the audience
- Write copy in terms easily understood by intended readers
- Avoid jargon for items aimed at customers
- Make sure all details, facts and prices are correct and current
- Be honest and never seek to mislead
- Consider using the AIDA principle
- Observe copyright.

Element 3: Administer activities relating to the production of draft items

3.1 Provide resources for the production of draft items

Introduction

All brochures and marketing materials to be produced need resources to enable their development.

This section identifies the basic resource classifications and presents points for consideration in relation to the provision of necessary resources for the production of brochures and marketing materials.

Basic resource classifications

The major classifications of resources which need to be provided to enable production of marketing materials are:

- Funding – this is the money, cash or credit authorised and allocated by management for each individual item.

  There is *always* a limit as to what is available.

  Financial resources may be allocated:

  - To a department – and it is up to the department how they spend this money
  - On a project-by-project basis – for individual items

  Attention should be paid to trying to obtain external funding for marketing materials – this may be available from:

  - Carriers who are to be used
  - Attractions named in the items
  - Government agencies such as tourism bodies interested in securing visitors to the country.
  - Where funds are obtained from other sources there is usually a trade-off in that they will normally require some input to the text or insist they/their logo is included.
- Physical resources – which may relate to:
  - Photographs
  - Sample brochures
  - Maps
  - Copies of previous items the organisation has produced

  - DTP technology and facilities – there has been a significant growth in the availability of desktop publishing packages over recent years: many businesses now conduct their own in-house desktop publishing.

    Common publishing packages include:

    – Adobe InDesign – a more sophisticated option than PageMaker
    – Adobe PageMaker
    – FrameMaker – now owned by Adobe
    – Microsoft Office Publisher
    – PagePlus
    – PageStream
    – QuarkXPress.

- Staff – which relates to:
  - Allocation of individual employees with certain knowledge and specific skills to assist in the production process
  - Allocation of hours/time for the development and production process
  - Possible need to arrange for back-filling of staff who are seconded from their normal duties to participate in the development process
  - Specification of external professionals who:
    – May be used
    – Can be used
- Information – this is arguably the single biggest/most important primary resource requirement for all marketing materials.

  Common needs relate to an endless list of information such as detail relating to:
  - Times
  - Dates
  - What is available in/at destinations and attractions
  - Prices
  - Facts and figures
  - Taxes
  - Immigration and customs requirements
  - Geographical and historic features
  - Company policies
  - Terms and Conditions
  - Guarantees and Warranties.

3.2 Proof read material

Introduction

When the brochure or item has been developed in a finished 'draft' form it needs to be checked before it is released *internally* for comment and feedback.

This section defines and highlights the importance of proof reading and identifies general requirements relating to this critical task.

Proof reading

Definition and importance

Proof-reading is checking the material to ensure everything is 'right'.

It is a serious part of the development process for marketing materials because if there is a mistake in anything that is produced:

- It will reflect badly on the organisation
- It can give potential customers grounds to believe the organisation is unprofessional in other aspects of its business – such as taking care of its customers.

Note: proof reading will be looked at again in section 5.4 when there is a need to check materials from the printer.

Things to check/look for

When proofreading, look for:

- Grammatical errors
- Spelling mistakes
- Typographical errors
- Omissions (things left out)
- Language used
- Inaccuracies
- Mistakes
- Flow
- Readability
- Clarity.

Pay special attention to:

- Prices
- Figures/numbers
- Addresses, telephone numbers, and email addresses
- Names of people to contact.

In addition the proof reading is intended to:

- Check to ensure materials do not give unintended offence
- Verify the inclusion of all required information
- Check facts and figures contained in the item are accurate, current, relevant and comprehensive
- Ensure there are no last-minute changes to the information contained within the items – such as:
  - Price fluctuations
  - Amendments to legislation or travel schedules
  - Unavailability of destinations or attractions

Keys to proof reading

When proof reading/as part of the proof reading process:

- Allocate time for it – do not rush this step and never skip it
- Do it more than once – never believe one reading will identify errors and/or omissions
- Leave time between readings – proof read this morning and then tomorrow, not straight away after the first reading
- Get more than one person to do it – a second (and third or fourth) pair of eyes is a good idea to gain different perspectives and optimise the likelihood of issues being detected
- Have someone who has not been involved in the development process read the materials – they will approach it with a more open mind
- If funding allows, use the services of a professional proof reader and editor.

Internet advice

The articles below might give additional insight to proof reading:

- ‘Proofreading’ at http://writing.wisc.edu/Handbook/Proofreading.html
- ‘Top 10 proofreading tips’ at http://grammar.about.com/od/improveyourwriting/a/tipsproofreading.htm
- ‘How to copyedit and proofread written work’ at http://www.wikihow.com/Copyedit-and-Proofread-Written-Work.

3.3 Circulate items for comment and feedback

Introduction

Following proof reading for internal purposes it is SOP in many/most businesses to circulate draft materials for feedback.

This section explains why this is done and presents suggestions for circulation for comment and feedback.

Need to circulate items

Need to circulate items at this stage is required to:

- Keep management informed and up-to-date – this is necessary to:
  - Inform them about what is happening
  - Keep them appraised on what is being developed
  - Allow them to actively monitor progress on plans of which they are commonly aware/have prepared
  - Obtain approval to proceed with the proposed items
- Give those who were involved in the development process an opportunity to check what has been produced – so they can:
  - Verify the material which has been prepared

    and/or
  - Make recommendations for improvement – see below
- Get input from those who may not have been involved in the development process – this can:
  - Enable thoughts from people outside the ‘development team’ who may have legitimate concerns to air and/or contributions to make
  - Let them know what is being prepared and what they can expect in the near future
- Add another opportunity/dimension for:
  - Proof reading
  - Fact checking
  - Identification of errors and omissions.

‘Change’ or ‘improvement’?

It is important to understand whenever materials are circulated to others for their comment or feedback there will invariably ***be*** comment or feedback.

The problem is not all comment or feedback will result in *improvement* to what was originally prepared.

Many comments are simply ‘changes’ which do nothing to genuinely improve the end product and it is *improvement* to the final item that should be the guiding principle by which all contributions are made.

Change just for the sake of change should be ignored and avoided.

Circulation list

The draft materials (which should have been proof read – as described in the previous section) should be circulated to designated personnel as specified by a ‘Distribution List’ for these materials.

This Distribution List can vary over time and change depending on the content and focus of various marketing items but will frequently contain require circulation of items to the following:

- Management – see earlier comments, this section
- Business and strategic partners
- Agencies and sub-branches
- Intermediaries who will be involved in promoting/selling the product/service being featured
- Sales staff within the organisation
- Accounts and financial department.

Directives when circulating items for comment and feedback

When forwarding these items for comment it is necessary to:

- Provide a **hard copy** mock-up – so readers get a genuine feel for the ‘real thing’ rather than asking them to provide feedback on an electronic /soft copy version.

  Nothing replaces the presence of an *actual* document/item to provide realism and generate responses
- Give the context for the item – that is:
  - Advise those on the List of the focus and intent of the sales/marketing campaign that the item is part of
  - Identify the target market/s
  - Tell them of the objectives and targets it is hoped will be achieved
  - Give them relevant start and finish dates for promotions
  - Explain when, how and where the item will be used as a marketing tool
  - Indicate the costs involved in relation to development/production of the item and other associated costs (which will differ according to the type of item but may [for example] include distribution costs, cost of buying advertising space)

- Background the development process – by:
  - Giving the rationale behind the item and/or the content
  - Naming those involved in the development process
  - Referencing research undertaken which underpins the tactics/content of the item
- Explain how comments need to be made – for example:
  - "Mark-up the included hard copy"
  - "Send suggestions for change by email to me by 4:00PM on XX/XX/2017"
  - "Attend the Marketing meeting at 2:30 XX/XX/2017 in the Board Room to provide your feedback"
- Set a time and date for comments/feedback to be returned – never leave the time/date open-ended. People always perform better when given a deadline to meet!

Commercial-in-Confidence

It needs to be stressed that at this stage most of the details contained in these marketing materials are deemed to be commercial-in-confidence.

This means they are private/secret and should not be revealed to anyone outside the organisation/outside the Distribution List.

While the marketing materials/items will eventually be released to the public, **at this point** they are commercial-in-confidence and it is vital to remember this.

3.4 Revise brochures and marketing materials

Introduction

When the comments and feedback from 'relevant others' (those on the Distribution List) have been received the next stage of the development process can take place.

This section highlights the significance of this step and looks at revising brochures and items on the basis of input received.

Implications flowing from this step

This stage of the process is extremely important because the final product produced as a result of this step:

- Will be the one sent to the printer/provider for a quotation
- Will represent what the organisation wants to say publicly to its various target markets
- Is potentially legally binding on the business
- Creates the foundation for future sales
- Represents and reinforces the brand and image of the company
- Is likely to cost the organisation significant money to produce – so it needs to be right.

Standard procedure for revising materials

Changes/revisions to marketing materials must never be made on a whim.

Basic premise

Given the production of the *original* item is the result of much thought and deliberation, alterations should only be made:

- If there is an identified error – for example, in terms of:
  - Costs, prices, dates, times
  - Destinations, activities, inclusions
  - Facts and figures, advice and information provided
- If an major point has been omitted – which may relate to:
  - How to make a booking or the need to pay a deposit
  - Limited vacancies/opportunities/seats
  - A piece of legal advice/information
  - A unique/important selling point
- If something has changed in the time between production of the draft and 'now' – such as:
  - A new tax has been introduced
  - The tax rate for a service has changed
  - Legislation impacting the product/service has been introduced or amended

    - Political or other factors have arisen which impact the trip/tour/product/service

- If someone can present a compelling argument there needs to be change – which can be based on a host of factors such as.
    - New market research findings
    - New information about what the opposition are doing in relation to their promotion/marketing
    - Emergence of a new market.

Keys to making revisions

The following are essentials when revising materials:

- There should be a face-to-face meeting of the stakeholders – this is the best way to deal with this stage of proceedings
- Everyone should have an opportunity to present their case for change – and explain, defend and justify it
- No idea/suggestion should be ignored – this does not mean all ideas have to be accepted; it just means if someone believes they have a valid point to raise it should (at least) be aired and listened to even if it is subsequently dismissed
- Revisions must be based on a legitimate reason to do so – as opposed to simply making changes for the sake of making changes: the revised materials should be able to demonstrate in some way it is materially better/superior to what was there in the first place
- Agreed suggestions for revisions need to be undertaken, circulated and considered in the same way the original item was – there needs to be another 'review' process of the revised draft material/item
- There can be a need to revise the revisions – there is no guarantee the revised version will be the final version: there can be a need for several draft versions to be created before the approved final version is developed
- The final approved version needs to be signed off by management – as authorising the item for further action/production and release.

Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

Please note: this Work Project follows on from the previous Work Project and forms the basis of other Work Projects.

3.1 For the three items already being prepared you are required to show evidence of your ability to administer activities relating to the provision of draft items by presenting proof you:

- Could identify the necessary resources to enable production of the items
- Have produced draft items
- Have proof read content/copy
- Have involved relevant others on the proof reading activity
- Have revised materials on the basis of identified errors, omissions and/or comment and feedback.

Summary

Administer activities relating to the production of draft items

When administering activities relating to the production of draft items:

- Provide or obtain necessary physical and information resources
- Gain funding/finances
- Allocate or obtain suitable and sufficient human resources
- Be prepared to use external expertise if affordable
- Prepare a draft
- Revise and refine as required – be prepared to make changes which improve the draft
- Proof read materials to check for spelling and grammar
- Actively look for errors and omissions
- Strive for clarity
- Circulate drafts to others for their contribution and feedback
- Involve others in the proof reading process.

Element 4: Obtain quotations for production of brochures and marketing materials

4.1 Meet and discuss the proposal with service providers

Introduction

When the organisation (management) has finally approved the draft item/material for production the next step is to begin communication with external providers to discuss production of the items.

The information in this section backgrounds the context for this action detailing the service providers who may be involved and raising crucial considerations at this stage of the process.

Context

There is a need to meet and discuss the requirements for the final production of brochures and marketing materials with providers in order to:

- Determine who/which businesses are available to provide the goods and services required
- Assess the experience of third party providers in producing what is needed for other similar organisations
- Evaluate the options available to the organisation – the options may be local or international and there may be an internal/organisational requirement to focus on the use of (only) 'preferred providers (see below).
- Investigate the timelines applicable to the production of what is required
- Identify specifically the particular services which each potential provider can supply
- Initiate discussions which will form the basis of obtaining a formal quotation for the work to be done – see next section.

Preferred providers

Many (but certainly not all) organisations have a 'preferred providers' (or 'preferred suppliers') list.

Companies on this list are providers the organisation prefers to do business with and the expectation is these are the businesses to be dealt with when producing marketing brochures/materials.

Businesses on this list have been chosen to be on the list as a result of various reasons such as:

- Their previous demonstrated ability to produce satisfactory work for the organisation

- Their capacity to quote good prices
- Their willingness to work with the organisation to produce what is required and meet imposed deadlines
- Their ability to provide assistance in the development and/or post-production phases for brochures and other materials (such as distribution; securing advertising space or 'exposure')
- Totality of services included in/as part of the quotation
- Contra deals established by the business owner
- Obligations imposed on the organisation by way of other contracts the business has entered into – which may oblige the company to use nominated businesses for certain services.

Service providers who may be involved

In terms of the organisations who may be involved in this stage of the process there can be a need to consult internally and/or externally with:

- Graphic artists
- Graphic designers
- Printers
- Stock/paper suppliers
- Colourists/colour coordinators
- Image makers/consultants
- Brand strategists
- Brand managers.

Important considerations at this stage

It is always important at this stage to:

- Schedule sufficient time for this stage of the operation – it is an essential aspect of what is occurring and merits sufficient time
- Make sure the organisation has clearly and fully explained to the other party exactly what it wants to achieve – there needs to be full disclosure about all relevant factors (such as but not limited to target market/s; objectives and goals; sales targets' budget)
- Involve relevant others from the organisation in the discussions – so they are aware of what is taking place and the options being generated/sourced for the project
- Obtain samples of previous work done by potential providers – it is always a good idea to select possible providers from organisations who have demonstrated experience and a successful track-record/history in the same market/industry/sector
- Evaluate the samples/previous work done by the potential suppliers – to assess how good it is and to check the 'actual' items meet the stated promises made by the company
- Develop a personal relationship/rapport with the businesses – as this tends to elicit more cooperation and commitment to the job.

4.2 Provide detailed specifications as the basis for obtaining a quotation for work to be done

Introduction

An integral part of obtaining quotations for the production of brochures and marketing materials is the need to generate detailed specifications for the work required to be done.

This section explains the concept of quotations and highlights factors to be considered when compiling the specifications which will form the basis of the quotation.

Quotations

Before committing to the printing/production of brochures and marketing materials, it is standard practice to obtain a quotation.

A quotation (or 'quote') is an estimated cost provided by the supplier for the items ordered.

It may be required even where previous successful business has been transacted with the provider.

Multiple quotations may be required for jobs over a set value – internal company policies or management preferences will determine what applies in this regard.

A quote is also needed because it forms an important part of the contract between the organisation and the printer/provider.

Specifications for the quotation

To obtain a quotation there is a need to provide the third party provider with a range of detailed information.

This information/detail is called the 'project/job specifications'.

Exactly what is needed in terms of specifications will be worked out between the organisation and the business that is being asked to provide the quotation, but it will generally include specifications of:

- Quantity required
- Size and weight of finished brochure
- Type or weight of paper to be used
- Number of colours
- Number of photographs
- Layout and style of text
- Whether brochure is to be printed on one or both sides
- Number of pages

- Requirement for proofs to be forwarded – this should be a mandatory and non-negotiable requirement
- How the original material is going to be provided to the printer/producer– for example, on disk or in hard (mock-up) copy form
- Additional requirements required for the job – such as finishing (see next section) and/or distribution
- Deadline for delivery of proofs
- Deadline for delivery of finished product
- Budget limitations/parameters
- Delivery *location/s* for drafts/proofs and finished products.
- Terms and conditions – relating to issues such as:
  - Payment
  - Rectification/redressing of problems.
  - Production of and prices for additional materials if more items are subsequently required
  - Time period for which the quotation is to be valid.

The specifications should always reflect the discussions which have taken place between the parties.

4.3 Obtain quotations from a range of service providers

Introduction

When specifications for quotations have been developed the next step is to actually obtain quotations for the work which needs to be done.

This section builds on the information provided in the previous section presenting options for obtaining quotes and detailing 'finishing' of brochures.

Obtaining quotes

Quotations are commonly obtained in one of the following ways:

- Asking the providers who have already been contacted and with whom the work has already been discussed to submit a quote based on the specifications developed (as described in the previous section).

  This request for a quotation may be made through:

  - A formal letter requesting a quote
  - An email
  - An informal telephone call
  - An in-person face-to-face request

- Offering a tender and releasing an RFT document – this offer asks 'interested parties/providers' to submit tender/quotes for the work and contains the details of the specifications for the work required.

  The RFT document may be:

  - Circulated generally
  - Targeted only to certain organisations the company wishes to do business with.

Website

It is interesting at this stage to visit the commercial site http://www.bestprintingonline.com/brochure-printing-quote.asp to see an alternative option for obtaining a quote for the printing of brochures.

Key points

As part of the process of obtaining quotations:

- Ensure management has approved drafts internally for this stage of the process – make sure they have agreed/signed off on what is required and what is to be produced
- Give the same detail/information to every business asked to provide a quotation – this applies to:
  - Provision of initial information/specifications

  - Additional information supplied as a result (for example) of a query by one potential provider

- Ensure quotations are received from a number of different service providers – in keeping with internal requirements to obtain a variety of quotations prior to making a purchasing decision
- Establish a file for all quotes – so they do not get lost and are readily available for reference and comparison purposes
- Be available to providers – in order to provide further information to them and/or clarify issues as/if required
- Follow-up – as/if required. Be prepared to make a telephone call of contact a business that has been asked to provide a quote if a quotation has not been received from them.

Finishing

'Finishing' may be required for certain marketing materials/brochures and not for others.

Finishing is a generic term referring to work the producer may need to undertake to completely 'finish' the product/item.

Finishing highlights that simply printing/producing a page/pages of an item is not of itself sufficient to complete the job.

In practice 'finishing' of brochures can involve:

- Folding
- Trimming
- Stitching
- Stapling.

It is important to ensure specifications for what is required in this regard is included in the RFT as producers/printers will seek to levy additional charges for each of these tasks.

4.4 Evaluate quotations received to make a purchasing decision

Introduction

When quotes have been requested and received they will need to be evaluated.

This section examines this part of the process highlighting critical aspects which need to be considered.

Using the AAA approach

The evaluation of quotations can be seen as AAA:

- Acknowledging
- Assessing
- Accepting – covered in the next section.

Acknowledging

It should be standard practice to acknowledge receipt of all quotations received.

This:

- Is polite
- Is good business practice
- Helps develop the relationship already established with the provider.

Acknowledging may simply take the form of:

- An email to show their email has been received – even a 'Read Report' response can reassure potential suppliers their quote has (at least) been received
- A phone call to say the quote has arrived.

Assessing

This is the crux of the process and should involve:

- Developing a selection team who will evaluate all quotes received – this team should comprise a representative from all stakeholders and meet formally to discuss and analyse all submissions received.

  Using a team approach:

  - Relieves one person of the responsibility of making a decisions
  - Keeps people involved and aware of the development process
  - Ensures different points of views and opinions are factored into the final decision about which provider to use
  - Achieves a more balanced and comprehensive review of all proposals
- Assessing quotations against identified criteria for the production of items as contained in the specifications supplied – just to check the provider is able to provide and is quoting on the requirements for the job.

Never assume the provider:

- Has interpreted the requirements as intended
- Is quoting on what was required
- Can deliver what is needed

- Generating a check list or ‘scoring sheet’ to use when comparing options – so distinct and agreed topics (which commonly relate to/reflect the initial specifications) can be determined and analysis/assessment can be made on an objective basis for each quote
- Following-up as required – this can entail:
  - Asking a provider for more information
  - Getting a provider to clarify a term/part of their quote
  - Obtaining more examples of their work
  - Enquiring if a company who has not yet submitted a quote is actually going to forward one (especially if they were a favoured option)
- Providing an opportunity for those who provided submissions to ‘speak to’ their proposals – in many cases a quotation on its own never gives the full picture about a job.

  There is often a need for the company by submitting the quote to attend and explain their submission, discuss their approach and illustrate their rationale: this session also allows questions to be asked and answered.

4.5 Select the service provider(s) to supply services and lodge official order

Introduction

After quotations for work have been received and assessed it then remains to select the successful tenderer.

This section looks at activities in the ‘accepting’ phase of the triple-A approach presented in the previous section.

Factors determining the successful tender

When a comprehensive and careful assessment of all quotations has been completed the successful tendered will be selected.

Factors which are critical in this decision relate directly to the specifications given to all companies who presented a tender – in essence final selection will be based on a combination of factors such as:

- Quality of the finished product
- Ability of the tenderer to deliver the product by the required timeline
- Cost
- Terms and conditions – such as:
  - Amount of deposit (if any) required
  - When first and/or final payment is required
  - Guarantees of work quality
- Capacity of the business to provide any identified additional work (such as finishing, distribution, securing access to displays or gaining exposure to target markets).

Activities involved in accepting a quote

Accepting a tender/quotation can involve the following:

- Consensus agreement among selection team – as to:
  - Who is the successful bidder
  - Why they are being chosen
- Notifying the successful tenderer about the decision which has been made.

  The way this is done will depend on the existing relationship with the other business and the value of the work to be done.

  Notification may involve/require:
  - A telephone call to advise them
  - An email
  - A formal meeting

    - A handshake
    - Raising of a Purchase Order for the work – see below
    - Creation and signing of a legally binding contract.
- Communicating the decision to others – this will involve:
    - Notifying other internal employees/personnel who were not part of the selection team
    - Advising interested joint venture partners and other external stakeholders
    - internally – to relevant other personnel

- Advising the unsuccessful tenderers – this may involve:
    - Thanking them for their interest – again, this is sound business practice
    - Returning items forwarded as part of the submission process
    - Explaining rationale for the decision – this can be a useful thing to do as it gives the businesses a better idea of what is needed should they elect to present future tender submissions
- Paying a deposit – this may be a requirement for some jobs and not for others.

  Different suppliers/providers have different requirements in this regard and their individual orientations are spelled out in their general/standing Terms and Conditions or in the terms and conditions for the individual job/contract.

  A percentage of the full price for the job is frequently used as the figure for a deposit with 10% being a commonly used figure.
- Finalising last-minute issues – even where a detailed analysis of various tenders has been carried out there are frequently last-minute details which need to be settled before the work can begin/be completed.

  This highlights many decisions made about the printed/producer to use:
    - Are made before all final details are known
    - Are often made on decisions other than the 'final product' which will be produced.

The Purchase Order

When the printer/supplier has been notified they have been awarded the job there may be a need to raise a Purchase Order.

What is a Purchase Order?

A Purchase Order is a document issued by the organisation and made out to the supplier authorising the supply of the products or services detailed in the document.

It confirms the organisation will pay the amount stated for the items listed.

The Purchase Order will contain:

- Name and contact details for the organisation buying the product/service
- Name of the supplier from whom the purchase is to be made
- Details of what is being ordered

- Quantities involved
- Price
- Signature of authorised representative/s from the organisation
- A number – for reference purposes.

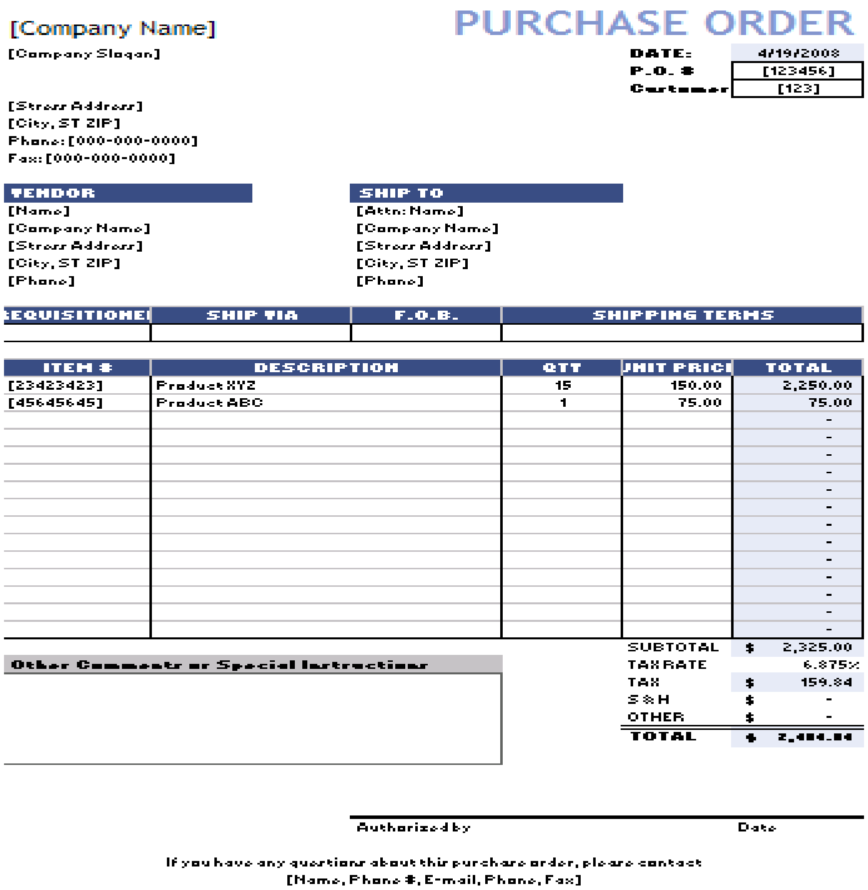
The Purchase Order may be forwarded to the supplier by mail, fax, or email.

A copy of the Purchase Order will traditionally remain in the Purchase Order book to serve as reference for the business, or the original may be photocopied and placed in a file.

It is also becoming more common today for purchasing with preferred suppliers to be carried out over the Internet, known as e-Purchasing.

Raising a Purchase Order can require:

- Providing necessary details to the accounts or purchasing department
- Physically writing out the details of the purchase on a pro-forma Purchase Order document.



[Company Name]
[Company Slogan]

PURCHASE ORDER

DATE: 4/19/2008
P.O. # [123456]
Customer [123]

[Street Address]
[City, ST ZIP]
Phone: [000-000-0000]
Fax: [000-000-0000]

VENDOR	SHIP TO
[Name]	[Attn: Name]
[Company Name]	[Company Name]
[Street Address]	[Street Address]
[City, ST ZIP]	[City, ST ZIP]
[Phone]	[Phone]

REQUISITIONER	SHIP VIA	F.O.B.	SHIPPING TERMS

ITEM #	DESCRIPTION	QTY	UNIT PRICE	TOTAL
[23423423]	Product XYZ	15	150.00	2,250.00
[45645645]	Product ABC	1	75.00	75.00
				-
				-
				-
				-
				-
				-
				-
				-
				-
				-
				-
				-
				-

SUBTOTAL	$	2,325.00
TAX RATE		6.875%
TAX	$	159.84
S & H	$	-
OTHER	$	-
TOTAL	$	[illegible]

Other Comments or Special Instructions

Authorized by Date

If you have any questions about this purchase order, please contact
[Name, Phone #, E-mail, Phone, Fax]

Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

Please note: this Work Project follows on from the previous Work Project and forms the basis of the final Work Project.

4.1 For the three items you have drafted you are required to obtain or simulate obtaining quotations for the production of the brochures and the merchandising item providing evidence you can:

- Discuss required needs with providers
- Generate detailed specifications for each job
- Obtain (real or mock) quotations
- Evaluate a range of quotations for the work
- Select a provider for each job giving reasons for each choice.

Summary

Obtain quotations for production of brochures and marketing materials

When obtaining quotations for production of brochures and marketing materials:

- Meet with external providers and get to know them and their capacity
- Meet and speak face-to-face
- Look at previous work providers have done
- Generate clear specifications about what is required
- Be aware of the possible need to involve/use 'preferred suppliers'
- Use these specifications as criteria for deciding which supplier/printer to use
- Ensure all requirements for the job arte included in the specifications
- Develop a working relationship with any external businesses to be used
- Seek quotations for work to be done
- Acknowledge receipt of all quotations/tenders
- Form a team to assess/analyse options
- Base selection of successful tenderers on the specifications for the job
- Advise the successful applicant and initiate action to begin production of what is required.

Element 5: Administer activities relating to the production of final items

5.1 Monitor production activities undertaken by selected service providers

Introduction

A key element in administering activities relating to the production of brochures and marketing materials is the need to *monitor* production.

This section looks at actions implicit in keeping the production process on track.

Activities involved

Once the provider/printer has been informed they have secured the job (and supporting documentation/payments have been completed) there is commonly a need to:

- Be available as required – to:
  - Answer questions about the project
  - Provide direction or guidance in relation to matters raised
- Meet with service providers on a regular basis – this can be at their premises or elsewhere but these meetings are important to:
  - Keep them focussed on delivering what has been promised/agreed
  - Maintain their awareness deadlines agreed on remain important and necessary
  - Enable emerging problems/issues to be addressed and resolved
  - Cultivate a positive relationship.

    These meetings should be face-to-face as opposed to telephone meetings as it is harder for a provider to avoid questions and answer 'difficult' questions when talking in-person rather than over the phone.
- Make production-related decisions to move the project forward – as may be required for individual projects, for example:
  - Decisions regarding production variations to product which may be required during the production phase
  - Questions about revised deadlines – commonly relating to a need to a need to move 'due by' dates forward
  - Requirements to alter initial quantities ordered – given this may be an upward or downward movement

- Decisions to alter copy – which can often relate to:
  - Changes to dates, times and prices
  - Inclusion alterations
- Need to produce the same thing (brochure or item) but in a different language
- Need to add supplementary services to the initial agreement/contract.

Points to note

At this stage of the process it is worthwhile noting the key points below:

- Never ignore problems – as soon as an issue is identified (by either party) it must be addressed so it can be resolved.

  These problems tend not to resolve themselves – they have to be addressed, talked about and a plan of action determined for addressing whatever is causing the problem.

  It is worth bearing in mind few if any jobs of this nature exist in isolation from everything else.

  This concept is discussed further in section 5.3.
- Respond promptly – to questions and issues raised by the printer.

  This helps indicate the urgency of the work/the need for the job to be completed by the promised date, and helps avoid giving the provider an 'excuse' for slow delivery.
- Keep providers on their toes – this revolves around keeping them accountable and means:
  - Insisting they attend scheduled meetings with an account of what progress has been made since last meeting
  - Obtaining proof materials as soon as they are ready
  - Telling them action will be taken if they do not deliver on time and/or otherwise as required – this action may include:
    - Taking legal action to recover damages
    - Taking the business elsewhere to an alternate provider – see section 5.3
    - Telling other organisations/industry groups about their failure to deliver.

5.2 Ensure payment to service providers, as agreed

Introduction

All payments to printers/providers must be paid as agreed.

This section presents a range of considerations in this every basic but very important part of the process.

The importance of payment

It is worth highlighting the importance of paying providers and printers.

There are three main reasons to pay these people:

- If the organisation wants to deal with them again it has to have developed a reputation as a ‘good payer’ – this means having in full and on time
- If they are not paid they will tell other providers/printers about the situation – and the reputation of the organisation will suffer as a consequence. It may even suffer to the extent no other business will want to deal with it
- If they are not paid they may/will take legal action to recover the money they are owed – and the legal costs can add much more to what the organisation would have had to originally pay.

Payment considerations

All of the issues highlighted below need to be attended to.

Payment needs to be made:

- On or before the agreed date – there can be one or multiple dates for payment which need to be observed, for example:
  - Date for payment of a nominated deposit – to show ‘good faith’ and an ability to pay
  - Initial payment – this may be the first of several payment and is often a given percentage of the total job
  - Progress payment/s – due at set times throughout the duration of an extended job
  - Final payment – an end-of-job payment paid on completion of the work when the final product has been accepted and signed off on.

    For many small jobs a single payment is made and often required, say ‘within 14 days’, ‘within 30 days’ or otherwise according to the standard terms and conditions of the business

- In the amount specified – this means:
  - Amounts detailed and agreed to in a contract or other agreement must be paid without withholding any amount
  - Allowable discounts may be deducted – these may be available (for instance):
    - If early payment is made
    - If the organisation belongs to a body/group that normally attracts an industry or other discount
    - For repeat orders
- In the manner specified/agreed to – commonly local providers will pay in the currency of the home country and payment may be made in cash or by cheque.

  Foreign companies may have insisted payment is made in a stipulated currency.

  Other operators may require electronic payment (funds transfer) of some form.

In addition

It is also worthwhile noting:

- Matters where the organisation believes there should be a reduction in the quoted price (for example, due to lack of quality, mistakes, not meeting timelines) need to be raised with the supplier – it is never acceptable/sufficient to deduct an amount and tell the provider why this was done.

  The deduction needs to be discussed and an acceptable arrangement reached
- Receipts should be requested and filed for all payments
- Payment should be raised as a topic in meetings – so providers have an opportunity to query what they have been paid and/or raise issues in relation to payment so they may be quickly addressed
- Failure to pay as agreed/promised/expected is one of the biggest causes of ill will among businesses – and has the potential to causes significant damage to business reputations
- Issues/problems relating to payment should be immediately forwarded to management for their attention
- An organisation that is a ‘good payer’ will elicit more cooperation and willingness to be flexible from the businesses it deals.

5.3 Identify and use alternative service providers where production timelines are not being met

Introduction

For many projects where brochures and marketing materials need to be produced there can be a need to develop a Plan B at the same time the successful provider is chosen.

This section explains the concept of Plan B and underlines the common necessity of marketing brochures and materials needing to be delivered by a certain date as stated in the work/order specifications.

Plan B defined

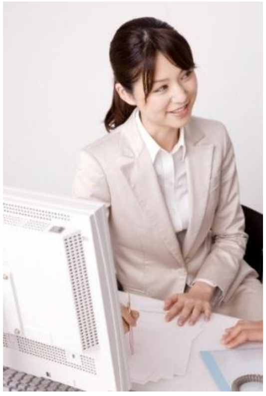
Plan B is an alternate plan.

It is the plan to be followed when the main/primary plan fails or cannot be implemented.

In this context Plan B may be required:

- Because the original printer/producer advises they cannot meet the deadline/s they promised they could meet
- If the printer/producer has a major accident/event in their business and the effect is their capacity to manufacture items is reduced or has been lost
- When disputes and disagreements occur between the parties making continuation of the original agreement impossible
- In circumstances where the producer meets/experiences unexpected problems which cannot be effectively addressed in a cost-effective and timely manner.

Importance of having a Plan B



Organisations are well-advised to have a Plan B for major jobs involving the production of brochures and marketing materials.

This advice is given because there are nearly always other activities which depend on or are based on the physical/actual presence of the brochures/items in given numbers by a nominated date.

That is, the production of brochures/items rarely stand/exist on their own – for example:

- Partners/agencies may be waiting for items by a given date – so they can distribute them/use them
- Media advertising space which relies directly on these items may have already been bought or booked – so the materials are required to underpin this advertising
- A wider promotion or advertising campaign could be jeopardised – as the materials are central to the central thrust of the initiative
- Action being taken by a competitor may be allowed to continue un-met without these brochures/items – as the organisation is unable to mount an effective ‘counter-offensive’ without them.

5.4 Proof read material that is produced as final items for approval prior to full production

Introduction

Materials provided by the producer/printer must be proof read before the final approval to proceed is given.

This section describes industry practice in this regard and provides (essentially, repeats) advice to follow.

Industry practice

When the printer/producer has been decided on they will work with the organisation to create a draft of the item/s required.

This is called a 'proof'.

The proof will be forwarded to the organisation so:

- The draft can be checked and reviewed
- It can be approved for final production.

Importantly:

- The printer/producer will make changes to the proof as/if required by the client/organisation
- The organisation will be responsible for the correctness of the final proof once they have approved it for production.

Standard requirements

When the proof has been received the normal practice is for the organisation to

- Check the proofs – for accuracy and compliance with the specifications for the job and alignment with any draft materials supplied as part of the original arrangement
- Advise service providers of changes which need to be made – these may be:
  - Errors that have been identified
  - Omissions
  - Things that need to be removed/taken out
  - Changes or updates needing to be made to proofs prior to final production.

In this context proof reading is the reading of 'the proof' as provided by the printer to check for errors and to make sure it complies with stated/agreed requirements.

Once the proof has been accepted the brochures will be printed and/or the materials will be produced so it is important the proof is 100% correct.

Checking the proofs

In order to make sure the proofs are ‘as required’ it is common practice to:

- Proof-read everything – everything that is to be produced MUST be proofed prior to official approval
- Proof-read more than once – never just proof the article once: it is easy to miss/overlook an error or omission if things are read just once
- Get more than one person to proof the item – involve other staff, people from other departments and people from outside the organisation
- Compare material against the specifications provided – never rely on memory: always match questionable issues against the certainty of the material contained in the specifications
- Involve the printer/producer – the closer the relationship between the organisation and the printer/producer the better the final outcome of the whole process and the clearer the understanding about the problems and the results required
- Make sure the key points are perfect – while attention will have been paid to ensure content/copy is correct it is especially important to ensure:
  - Telephone numbers are correct – and no digits have been transposed or are incorrect
  - The business name has been correctly spelled
  - Street and web addresses are correct.

5.5 Authorise production of final items

Introduction

There can be a need to authorise production of final items as part of the production process.

This section discusses requirements where this is the case.

Authorising production

In order to authorise production it may be necessary to:

- Check revised proofs if this was required = to ensure revisions meet with requirements/specifications

- Organise additional changes – if/where this is necessary
- Obtain official authorisation from designated management to proceed – this may involve:
  - Meeting with management to view/check the final draft/proof
  - Receiving verbal permission to proceed
  - Obtaining their signature on appropriate internal documentation
- Sign-off on a document provided by the printer/producer – giving them authority to proceed and confirming the provided proofs have been checked and are correct
- Confirm certain details – these are always issues identified in the specifications and this process is an opportunity to:
  - Make sure required dates, quantities and other needs remain as arranged
  - Negotiate necessary changes
- Make an agreed payment – there is often a contracted requirement money needs to be paid to the printer/producer after final proofs have been agreed and before actual production starts.

  In many cases the printer/producer will not proceed with production until this money has been received so this is an important step in order to get materials produced by the time/deadline needed.
- Note any communication pertinent to requirements for changes – so there is a record of negotiations and arrangements for future reference
- File all documentation – in-keeping with standard business practice and for future reference.

Note

In some cases the association/relationship between the organisation and the printer/producer is such that a simple telephone call is all that is needed to authorise the start of the final production phase.

5.6 Check items supplied by service providers as final items

Introduction

When the printer/producer has completed the requirements of the job the brochures/marketing items will be supplied to the organisation.

This section looks at activities involved in checking the items and presents some basic information regarding distribution.

Checking items

The activities below are necessary when checking items supplied:

- Use a team to do the checking – as opposed to doing the job alone.

  This speeds up the process and optimises the likelihood of problems being identified.
- Compare the finished product/s to the specifications and the approved proof/s – to make sure what has been delivered complies with what was needed/requested/paid for
- Check the quality of the final product – for example, with brochures there is a need to:
  - Check colours used match what was required/agreed
  - Check there is no 'colour bleed'
  - Check print clarity
  - Check required finishing has been applied
- Check the quantities supplied – to make sure the numbers provided are actually the numbers ordered/required
- Confirm the paperwork for the job is correct – this may mean:
  - Verifying invoice matches the quotation
  - Ensuring invoice/statement aligns with purchase order
  - Making sure there are no charges for services not requested or not provided
- Authorise final payment – to the service providers.

  It is important to pay promptly and as agreed in order for the organisation to remain a 'good corporate citizen' and to help create a positive relationship for the next time similar work needs to be done/negotiated.

Note

Where the finished product does not comply with the proof or other quality criteria, it is standard practice to:

- Inform management – so they can follow up with the printer/producer

  or

- Immediately contact the provider and discuss the situation with them.

It is at this stage a file copy of the quotation and the proofs become very important.

Distributing brochures and marketing materials

Distribution options are:

- The organisation distributes items themselves – this means the organisation maintains sole *control* over the process but also has sole *responsibility* for organising the work to be done.
- The printer/producer distributes them for an additional charge – according to a distribution schedule provided by the organisation
- Use a different business to handle distribution – such as a distribution house, distributor or courier service.

Some distribution cost considerations

As a guide, once the cost of design and print/production have been calculated an additional one third extra should be allowed for distribution costs.

Consider how many brochures the business will distribute:

- By direct mail
- At exhibitions and other events where the business will have a presence (display/stand)
- Through brochure racks at information centres, carriers, accommodation facilities
- Through overseas offices.

Online advice

Take the time to visit the following and similar sites to gain an idea of what various external providers can supply in relation to distribution services:

- http://www.sgflyerking.com/price.html
- http://www.asiaprintmart.com/flyers_distributions.html
- http://philippineflyerdistributor.webs.com/

Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

Please note: this Work Project follows on from the previous Work Projects.

5.1 For the purchasing decisions which were made as part of the previous Work Project you are required to administer (in real or simulated form) activities relating to the production of those items providing evidence of your ability to:

- Monitor production activities undertaken by the chosen providers/printers
- Ensure (simulated) payment is made
- Identify alternative providers who may be used should the selected provider/printer be unable to deliver on time
- Check final brochures and products to finalise the project.

Summary

Administer activities relating to the production of final items

When administering activities relating to the production of final items:

- Actively monitor production
- Be available to the service provider
- Insist proofs are made available
- Liaise with the service provider
- Address as opposed to ignore problems and production issues
- Make sure payment is made as agreed
- Have a Plan B
- Check proofs using assistance from others
- Revise proofs as/if needed
- Check the finished products for quality and quantity
- Decide on distribution options.

Presentation of written work

1. Introduction

It is important for students to present carefully prepared written work. Written presentation in industry must be professional in appearance and accurate in content. If students develop good writing skills whilst studying, they are able to easily transfer those skills to the workplace.

2. Style

Students should write in a style that is simple and concise. Short sentences and paragraphs are easier to read and understand. It helps to write a plan and at least one draft of the written work so that the final product will be well organised. The points presented will then follow a logical sequence and be relevant. Students should frequently refer to the question asked, to keep 'on track'. Teachers recognise and are critical of work that does not answer the question, or is 'padded' with irrelevant material. In summary, remember to:

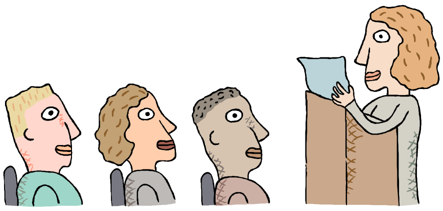
- Plan ahead
- Be clear and concise
- Answer the question
- Proofread the final draft.

3. Presenting Written Work

Types of written work

Students may be asked to write:

- Short and long reports
- Essays
- Records of interviews
- Questionnaires
- Business letters
- Resumes.



Format

All written work should be presented on A4 paper, single-sided with a left-hand margin. If work is word-processed, one-and-a-half or double spacing should be used. Handwritten work must be legible and should also be well spaced to allow for ease of reading. New paragraphs should not be indented but should be separated by a space. Pages must be numbered. If headings are also to be numbered, students should use a logical and sequential system of numbering.

Cover Sheet

All written work should be submitted with a cover sheet stapled to the front that contains:

- The student's name and student number
- The name of the class/unit
- The due date of the work
- The title of the work
- The teacher's name
- A signed declaration that the work does not involve plagiarism.

Keeping a Copy

Students must keep a copy of the written work in case it is lost. This rarely happens but it can be disastrous if a copy has not been kept.

Inclusive language

This means language that includes every section of the population. For instance, if a student were to write 'A nurse is responsible for the patients in her care at all times' it would be implying that all nurses are female and would be excluding male nurses.

Examples of appropriate language are shown on the right:

Mankind	*Humankind*
Barman/maid	*Bar attendant*
Host/hostess	*Host*
Waiter/waitress	*Waiter or waiting staff*

Recommended reading

Note: all Recommended Reading is sourced from 'Trove: National Library of Australia' at http://trove.nla.gov.au/.

2013. *Im-print 2 : innovative book and promo design = design de livres, brochures et catalogues = diseño de libros, folletos y catálogos = desenhos em livros, folhetos et catálogos*, Promopress, Barcelona

2013. *Scott, foresman handbook for writers + mywritinglab access code*, Longman, [s.l.]

Berman, Margo 2012, *The copywriter's toolkit: the complete guide to strategic advertising copy*, Wiley-Blackwell, Chichester, West Sussex; Malden, MA

Chritton, Susan 2014, *Personal branding for dummies*, 2nd Edition

COLLINS, GALEN R 2013, *Hospitality information technology: Learning how to use it*, Kendall hunt, [s.l.]

Elliott, Greg & Waller, David, (author.) & Rundle-Thiele, Sharyn, (author.) 2014, *Marketing*, Third edition, Milton, Qld John Wiley and Sons Australia

Friedmann, Anthony 2014, *Writing for visual media*, Fourth edition, Burlington, MA Focal Press

Hewes, Rachel, (editor.) & Hodges, Allison, (editor.) 2012, *The best of the best of brochure design*, Beverly, Massachusetts Rockport Publishers

Hiam, Alexander 2014, *Marketing for dummies*, 4th edition, Hoboken John Wiley & Sons

Ramage, John D & Bean, John C., (author.) & Johnson, June, 1953-, (author.) 2015, *The Allyn & Bacon guide to writing*, Seventh edition, Boston Pearson Education

Thill, John V & Bovée, Courtland L 2013, *Excellence in business communication*, 10th ed, Pearson, Boston

Whitaker, Wayne R & Ramsey, Janet E & Smith, Ronald D., 1948- 2012, *Mediawriting : print, broadcast, and public relations*, 4th ed, Routledge, New York

Wilcox, Dennis L & Reber, Bryan H 2013, *Public relations : writing and media techniques*, 7th ed, Pearson Education, Inc, Upper Saddle River, NJ

Winston, William & Granat, Jay P 2014, *Persuasive Advertising for Entrepreneurs and Small Business Owners How to Create More Effective Sales Messages*, Taylor and Francis, Hoboken

Trainee evaluation sheet

Coordinate production of brochures and marketing materials

The following statements are about the competency you have just completed.

Please tick the appropriate box	Agree	Don't Know	Do Not Agree	Does Not Apply
There was too much in this competency to cover without rushing.	☐	☐	☐	☐
Most of the competency seemed relevant to me.	☐	☐	☐	☐
The competency was at the right level for me.	☐	☐	☐	☐
I got enough help from my trainer.	☐	☐	☐	☐
The amount of activities was sufficient.	☐	☐	☐	☐
The competency allowed me to use my own initiative.	☐	☐	☐	☐
My training was well-organised.	☐	☐	☐	☐
My trainer had time to answer my questions.	☐	☐	☐	☐
I understood how I was going to be assessed.	☐	☐	☐	☐
I was given enough time to practice.	☐	☐	☐	☐
My trainer feedback was useful.	☐	☐	☐	☐
Enough equipment was available and it worked well.	☐	☐	☐	☐
The activities were too hard for me.	☐	☐	☐	☐

The best things about this unit were:

The worst things about this unit were:

The things you should change in this unit are:

Trainee self-assessment checklist

As an indicator to your Trainer/Assessor of your readiness for assessment in this unit please complete the following and hand to your Trainer/Assessor.

Coordinate production of brochures and marketing materials

		Yes	No*
Element 1: Identify the context for brochures and marketing materials			
1.1	Determine the factors that apply to the production of brochures and marketing materials	☐	☐
1.2	Plan the production of items	☐	☐
1.3	Develop action plans for individual brochures and marketing materials	☐	☐
Element 2: Manage inclusions for brochures and marketing materials			
2.1	Determine the target(s) for the items	☐	☐
2.2	Determine the content for the items	☐	☐
2.3	Determine format and layout for the items	☐	☐
2.4	Determine language for the items	☐	☐
2.5	Determine the prices to be stated in the items	☐	☐
2.6	Determine the copy for the items	☐	☐
Element 3: Administer activities relating to the production of draft items			
3.1	Provide resources for the production of draft items	☐	☐
3.2	Proof read material	☐	☐
3.3	Circulate items for comment and feedback	☐	☐
3.4	Revise brochures and marketing materials	☐	☐

		Yes	No*
Element 4: Obtain quotations for production of brochures and marketing materials			
4.1	Meet and discuss the proposal with service providers	☐	☐
4.2	Provide detailed specifications as the basis for obtaining a quotation for work to be done	☐	☐
4.3	Obtain quotations from a range of service providers	☐	☐
4.4	Evaluate quotations received to make a purchasing decision	☐	☐
4.5	Select the service provider(s) to supply services and lodge official order	☐	☐
Element 5: Administer activities relating to the production of final items			
5.1	Monitor production activities undertaken by selected service providers	☐	☐
5.2	Ensure payment to service providers, as agreed	☐	☐
5.3	Identify and use alternative service providers where production timelines are not being met	☐	☐
5.4	Proof read material that is produced as final items for approval prior to full production	☐	☐
5.5	Authorise production of final items	☐	☐
5.6	Check items supplied by service providers as final items	☐	☐

Statement by Trainee:

I believe I am ready to be assessed on the following as indicated above:

Signed: ______________________________ **Date:** ____________

Note:

For all boxes where a **No*** is ticked, please provide details of the extra steps or work you need to do to become ready for assessment.

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