



**beloved
brands**

Marketing skills assessment

We empower the ambitious to achieve the extraordinary

20 core marketing skills

1 Strategic Thinking

1. Takes a 360-degree holistic view that uncovers the brand's core strength, consumer bond, competitive dynamic, and situation
2. Slows down to think strategically, coming up with the most challenging, interruptive questions before reaching for solutions
3. Makes smart strategic decisions based on understanding the vision, focus, opportunity, market impact and performance result
4. Able to articulate the strategy throughout the organization to ensure everyone can understand and deliver the strategy

2 Brand Positioning

5. Define an ideal target market (consumers, users, shoppers) framed with accelerated need states, insights and enemies
6. Takes a consumer-centric approach to turn product/service features into functional and emotional consumer benefits
7. Finds the winning brand positioning space that is own-able & motivating the target, summarized with a positioning statement
8. Develops a brand idea that can steer how the brand shows up to every touchpoint, and organize who works on the brand

3 Marketing Plans

9. Translates smart, strategic thinking into key issues and strategic statements that form the foundation of the marketing plan
10. Decides on all elements of a smart marketing plan including the vision, purpose, values, goals, issues, strategies, and tactics
11. Strong in writing & presenting of the marketing plan to senior management & across organization—sales, agencies, partners
12. Develops smart execution plans—communication, sales/retail, and innovation—that deliver against the brand strategies

4 Marketing Execution

13. Lead any marketing execution project including brand communication, innovation, purchase moment, or experience
14. Writes strategic, consumer insights driven, and thorough creative briefs that will steer and inspire great work from experts
15. Partner with experts at agencies and throughout the organization to inspire greatness from the teams of experts
16. Makes smart and creative decisions on execution that delivers the strategy and tightens the bond with consumers

5 Brand Analytics

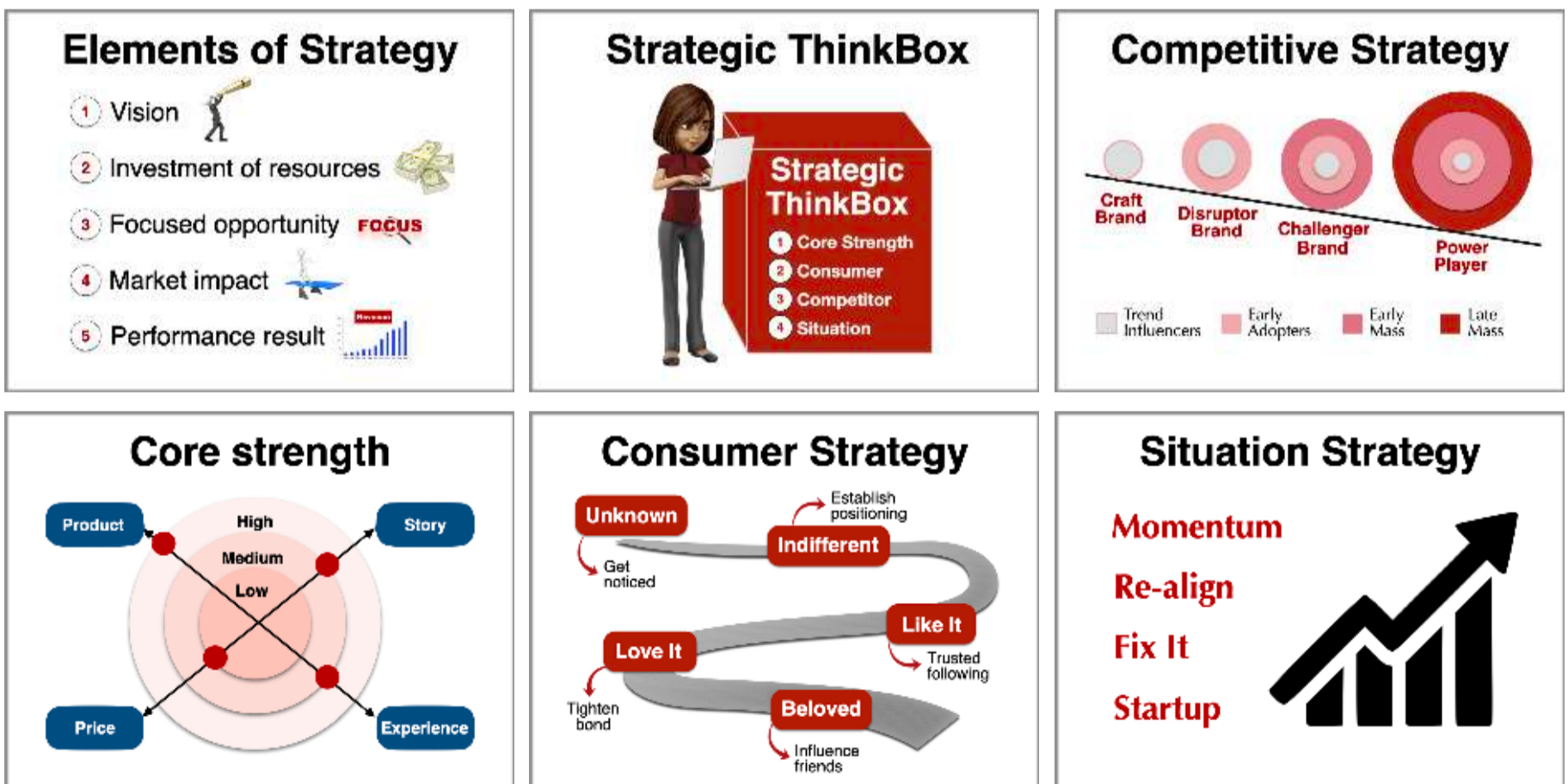
17. Understands all sources of brand data and knowledge—market share, brand funnel, consumption, qualitative, financials
18. Digs deep into data, draws out comparisons and insights, and build an analytical story that sets up a business problem
19. Leads a best-in-class 360-degree deep-dive business review for the brand that brings out the key issues to be solved
20. Writes analytical performance reports that outline the strategic implications from in-market consumption & sales performance

Strategic Thinking skills

Strategic thinking is a foundation of marketing that pushes to ask challenging questions. Your marketing team should take a holistic look at your brand's core strength, competitive landscape, the customer bond, and business situation.

1. Do your marketers take a 360-degree holistic view that uncovers your brand's core strength, consumers bond, competitive dynamic, and business situation?
2. Are your marketers able to slow down to think strategically, coming up with the most challenging, interruptive questions before reaching for solutions?
3. Do your marketers make smart strategic decisions based on understanding the vision, focus, opportunity, market impact and performance result
4. Can your marketers articulate the strategy throughout the organization to ensure everyone who works on the brand can understand and deliver against the strategy?

Our Beloved Brands strategic thinking tools



Brand Positioning skills

Your team's brand positioning skills should start by focusing on a target customer and then use a balance of functional and emotional benefits to find a winning space that is interesting, simple, unique, motivating, and ownable.

1. Are your marketers able to define an ideal target market (consumers, users, shoppers) framed with accelerated need states, insights and enemies?
2. Do your marketers take a consumer-centric approach to turn product features into functional and emotional consumer benefits?
3. Are they able to find a winning brand positioning space that is own-able for the brand and motivating to your target, summarized with a positioning statement?
4. Have your marketers developed a brand idea that can steer how the brand shows up to every touchpoint, and organize everyone who works on the brand so they deliver?

Our Beloved Brands brand positioning tools

Consumer profile

Target	Pro-Active Preventer Cookie Lovers
Description	Suburban working women, 35-40, willing to do whatever it takes to stay healthy. They're smart and do a lot of things, but can be a bit of a worrier about things.
Needs	• 40% believe going on vacation during pregnancy is a must, light snacking
Enemy	• All babies, not just pregnancy, are enemies
Insights	• They know they will never be perfect, but they want to do as well as they can. All the vitamins and cookies are there, just wish they were made for you. • They know they will never be perfect, but they want to do as well as they can. All the vitamins and cookies are there, just wish they were made for you.
Think now?	• How do you feel about your health? Do you feel like you're doing it right? (No, not really) and then... maybe.
Buying process	• You have been influenced by friends who are smart. Those who are buying will do so because they know it's the best choice. They know it's the best choice, but they don't want to be the only one who knows it.
Desired Response	• See: Carried to customers are aware of Gray's and if they see actual product. Think Gray's will be a great addition to my health, cookies. They know they will never be perfect, but they want to do as well as they can. All the vitamins and cookies are there, just wish they were made for you. Whimper to their friends they love Gray's and share the secret they are happy.

Consumer insights

A starting point for your thinking

"I feel _____ whenever I _____"

A human truth based on one of:

- underlying behaviors
- motivations/inspirations
- values or beliefs
- pain points
- emotions

A moment in the target's life


- A monumental moment in their life
- Moment of strength or weakness
- Part of the day, week, year
- Celebration moment (Birthday)

GRAY'S Cookies

Guilt and disappointed in myself whenever I _____

Cheat with a cookie, I just wish they were less bad for you

Brand Positioning Statement



- 1 To (Target) - Suburban working women, 35-40, who put in the effort to live healthier.
- 2 Gray's is (insight) - The healthy cookie option
- 3 That is (benefit) - The guilt-free cookie that helps you stay in control of your health
- 4 That's because (support point) - We want you to make informed choices with the knowledge that in this cookie series, Gray's matches the leaders on taste, but with only 100 calories and 3g of fat, you can experience a healthier life. Gray's helps you take control over what goes in your body by making smarter choices. Studies show people who use Gray's once a night are 3x more likely to lose 5-10 pounds.

Positioning Strategy

Consumer benefits

Functional Benefits

- Works Better
- Simplify
- Make Smarter
- Connect
- Make Healthier
- Saves Money
- Experience
- Helps Family
- Sensory

Emotional Benefits

- Feel Free
- Knowledge
- Feel Myself
- Comfort
- Self Assured
- Feel Liked
- Optimism
- Get Noticed
- Control

Brand Concept

Brand Idea

Guilt free pleasure with Gray's Cookies

Consumer insights or enemy

Main consumer benefit

Support points

Support visual

Try Gray's Cookies and find your way to stay healthy

Call-to-action

Marketing Plan skills

The Marketing Plan as a decision-making tool that guides everyone who works on the brand. Your marketers should be able to build a Marketing Plan that includes a vision, purpose, goals, key issues, strategies and marketing execution plans.

1. Is your marketing team able to translate smart, strategic thinking into key issues and strategic statements that form the foundation of the brand plan?
2. Do your marketers make decisions on all elements of a smart marketing plan including the vision, purpose, values, goals, issues, strategies, and tactics?
3. Are your marketers strong in writing, and presenting the brand plan to senior management and across organization—sales, agencies, partners?
4. Do you see your marketers develop smart execution plans—communication, sales/retail, and innovation—that deliver against the brand strategies?

Our Beloved Brands marketing plan tools

One page marketing plan

Marketing Plan

Analysis

- Sales: \$100M
- Profit: \$20M
- Market Share: 10%

Mission and Strategy

Execution Plans

Vision, purpose, goals

Brand Vision

To be the first 'healthy cookie' to generate the craving, popularity and sales of a mainstream cookie. Make Gray's a \$100 Million brand by 2016.

Our purpose

At Gray's, our purpose is to give people the cookie they will never feel guilty about eating. We know healthy can taste great.

2016 Goals

Goal	2015	2016	Comments
Sales	\$67.5M	\$100.0M	115% growth rate
Share	8.5%	12%	Focus on a shareable 2.5% share
Awareness	65%	75%	Focus on awareness from my opportunity
Profit	10%	12%	Focus on profit as a result of a 20% overall
ROI	4%	5%	High quality leads to high ROI

Finding key issues

Strategic ThinkBox

399 ThinkBox Questions

Gray's Cookies Key Issues

1. What is the core strength your brand can win on?
2. How tightly connected is your consumer to your brand?
3. What is your current competitive position?
4. What is the current, but next situation your brand faces?

Strategy page

Strategy #1: Drive trial by advertising Gray's "stay in control" positioning

Strategic Objective:

- Advertise Gray's "stay in control" positioning to new, "proactive preventers" to move consumers from consideration to trial and repeat purchase.

Goals:

- Increase penetration from 10% to 12%, specifically to over 15% to 20% with the core target. Monitor usage frequency among the most loyal to ensure a steady state.

Tactical Program:

- Launch all program target "proactive preventers" who are 25-40 female, work out 3x a week.
- Use "stay in control" message across advertising, packaging, in-store and events, which has linked a trial, marketing and credible message to Gray's.
- Program and budget approved, including mix of advertising and packaging and sampling to drive trial. More details outlined on the next strategy.

Watch out:

- At this point, we believe the product trial and consideration period for the category is highly important.

Execution plan

Brand Communications plan

Communications Strategy:

- Advertise Gray's "stay in control" positioning to new, "proactive preventers" to move consumers from consideration to trial and repeat purchase.

Target Market:

- "Proactive Preventers": Suburban working women, 25-40, who want to stay healthy.

Brand Idea:

- Give us the best feeling yet (guilt-free pleasure).

Main Benefits:

- Guilt-free cookie that tastes so good that you can stay in control of your diet.

Support Points:

- Gray's matched leaders on taste, only 100 calories and 8g of fat carbs.
- 100% whole grain, comes in a bag, ready to eat, daily delivered 6-10 pounds.

What do we want consumers to think, do or feel? Desired Response:

- Try Gray's to see if you like the great taste.

Media Options:

- Main creative will be TV 15-second spot with specialty health magazines, event signage and in-store sampling. Carry the idea into digital and media and website.

Brand strategy roadmap

Brand Strategy Roadmap

2015:

- Launch Gray's "stay in control" positioning to new, "proactive preventers" to move consumers from consideration to trial and repeat purchase.

2016:

- Increase penetration from 10% to 12%, specifically to over 15% to 20% with the core target.

2017:

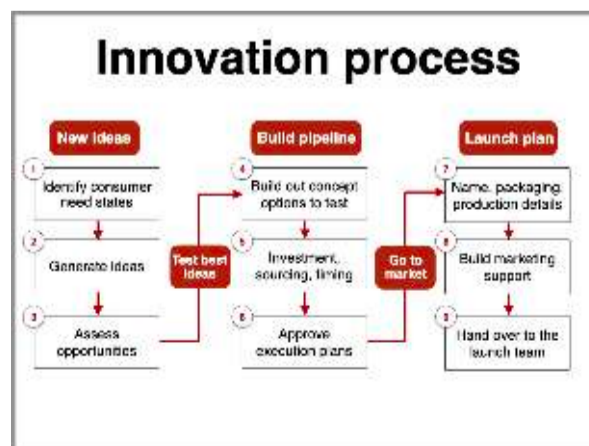
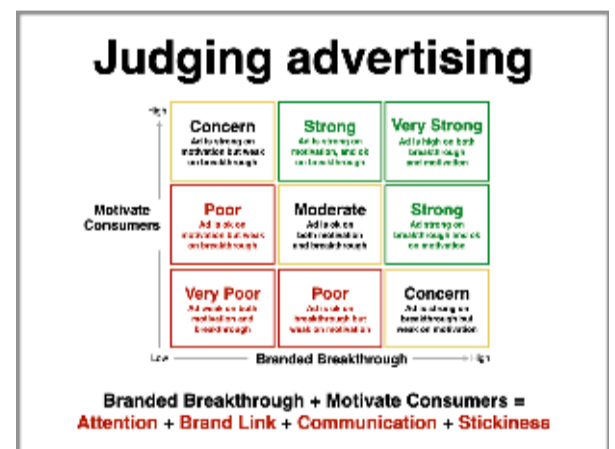
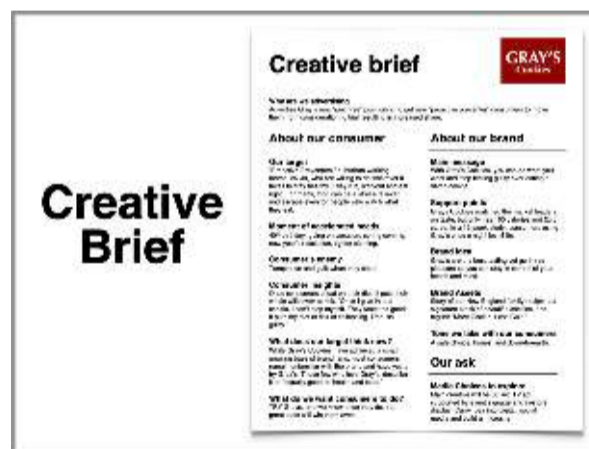
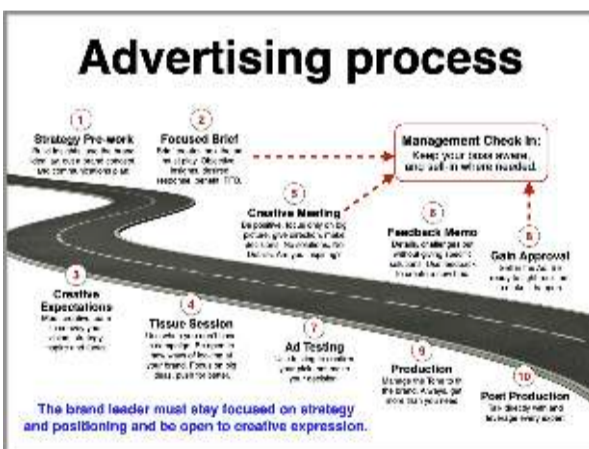
- Make Gray's a \$100 million brand by 2017.

Marketing Execution skills

Your marketers should be able to lead the marketing execution with skills that related to brand communications, innovation, and sales. Marketers must make smart decisions on execution around creative communication and media choices.

1. Are your marketers able to lead any marketing execution project on brand communication, innovation, purchase moment, or consumer experience?
2. Do your marketers write strategic, consumer focused and thorough creative briefs to steer and inspire great work from experts plus guide your decisions?
3. Do you see them act as partners with experts at agencies and throughout the organization to inspire greatness from the teams of experts?
4. Are they able to make smart and creative decisions on execution that delivers the strategy and tightens the bond with consumers?

Our Beloved Brands marketing execution tools

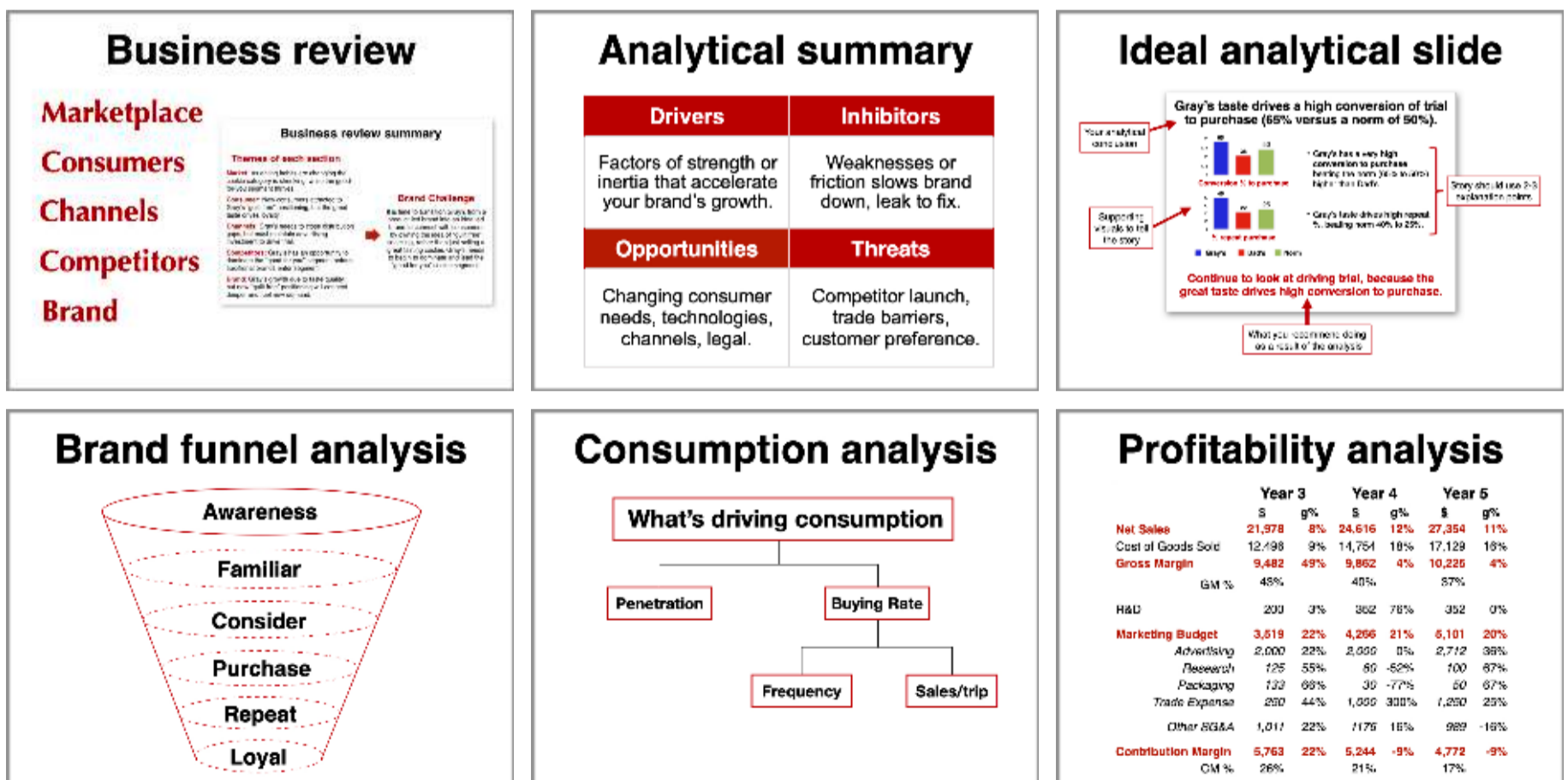


Brand Analytics skills

Marketers need to conduct a deep-dive business review, to assess your brand's performance and set up smarter strategic thinking. A brand audit must draw out conclusions about the marketplace, consumer, channels, competitors, and brand.

1. Do your marketers understand all sources of brand data and knowledge—market share, brand funnel, consumption, qualitative, VOC, financials?
2. Is your marketing team digging deep into data, draw out comparisons and insights, to build an analytical story that sets up a business problem?
3. Are your marketers able to lead a best-in-class 360-degree deep-dive business review for the brand that brings out the key issues to be solved?
4. Do they write analytical performance reports that outline the strategic implications of the in-market consumption results, and sales performance?

Our Beloved Brands brand analytics tools



Marketing Skills Audit tool

Use our 20 marketing skills to evaluate your marketing team. Scores above 4 are considered the ideal marketer. You are looking for skill gaps on your team that you can focus on development. A strong team will have 80% of the scores of 4+ ratings.

Marketing Skill Element	1	2	3	4	5
1. Takes a 360-degree view of strategy					
2. Slows down to ask strategic questions					
3. Makes smart strategic decisions					
4. Articulates strategy throughout organization					
5. Defines ideal consumer target					
6. Turns features into consumer benefits					
7. Finds winning brand positioning statement					
8. Generates brand idea					
9. Translates strategic thinking into statements					
10. Leads all elements of the marketing plan					
11. Strong in writing/presenting the plan					
12. Develops smart execution plans					
13. Leads any marketing execution project					
14. Writes inspiring, focused creative brief					
15. Partner with a team of experts					
16. Make smart, creative decisions					
17. Understands the sources of data					
18. Digs into data, draws out analytical story					
19. Leads deep dive business review					
20. Writes analytical performance reports					
Total Scoring					

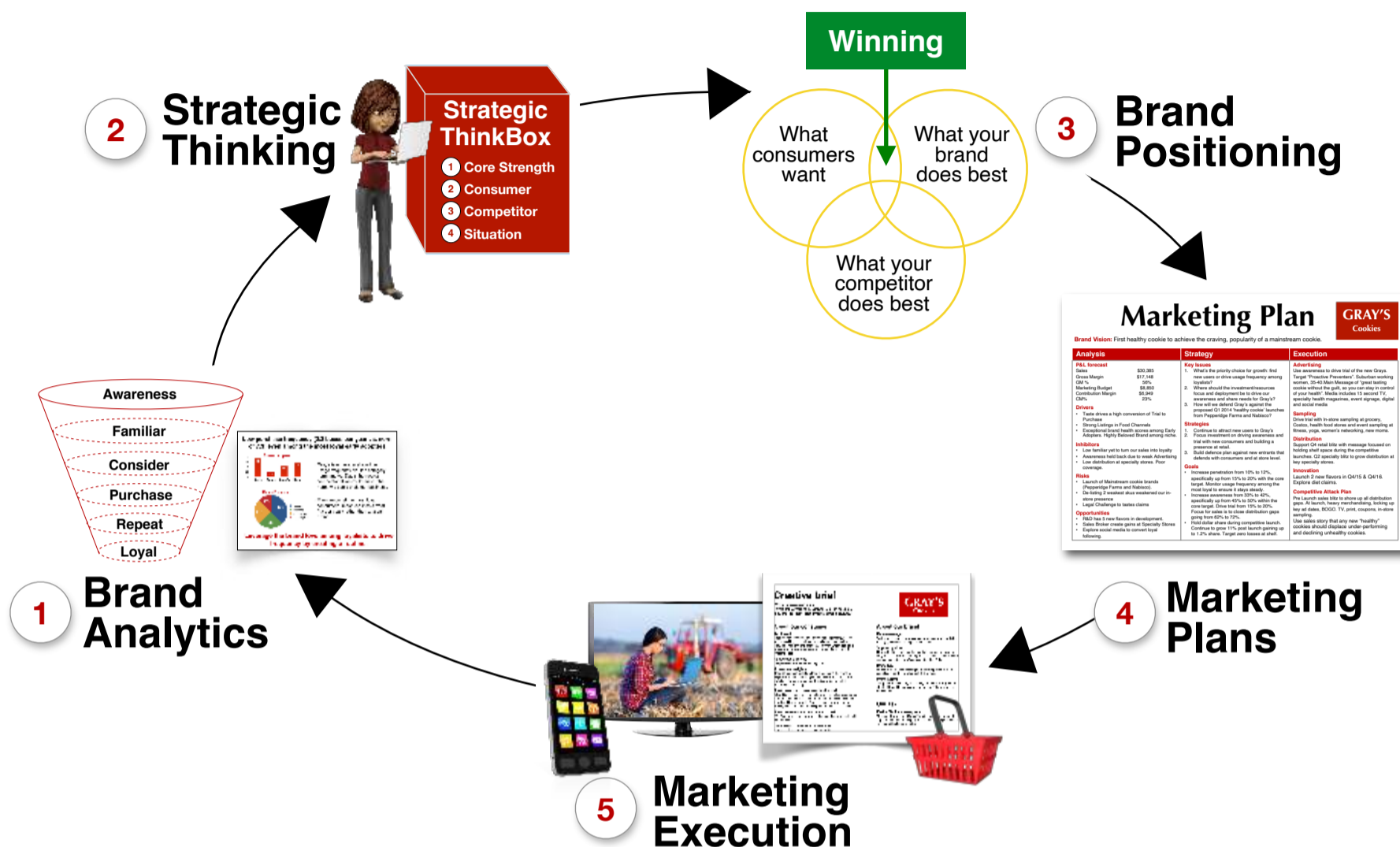
Scoring for each element

- 5: Exceptional
- 4: Very strong
- 3: Solid
- 2: Below expectation
- 1: Unable to perform

Assessment scoring for your team (% 4+ scores)

- 90%: Exceptional team delivering for the brand
- 80%: Strong Team, but may have one major gap area
- 70%: Performance gaps holding team and brand back
- 60%: Team not trained to deliver on your expectations
- Below 60%: Team is holding the brand performance back

Our marketing training teaches how to think, define, plan, execute, and analyze



How we make brand leaders smarter

- 1 Brand Analytics:** We teach how to lead a deep-dive business review, to assess your brand's performance and set up smarter strategic thinking, looking at the marketplace, consumers, channels, competitors, and brand.
- 2 Strategic Thinking:** We show how to ask the challenging questions by taking a holistic look at your brand's core strength, competitive landscape, tightness of the consumer bond, and business situation.
- 3 Brand Positioning:** Our brand positioning process starts with a consumer profile and uses a balance of functional and emotional benefits to find a winning space that is interesting, simple, unique, motivating, and ownable.
- 4 Marketing Plans:** We use the marketing plan as a decision-making tool that guides everyone who works on the brand. We teach how to write a brand vision, purpose, goals, key issues, strategies and marketing execution plans.
- 5 Marketing Execution:** Our marketing execution training includes the creative brief, innovation process, and sales plan. We show how to make smart decisions on execution around creative communication and media choices.

Summary of our marketing tools

Elements of Strategy

- 1 Vision
- 2 Investment of resources
- 3 Focused opportunity **FOCUS**
- 4 Market impact
- 5 Performance result

Strategic ThinkBox

1 Core Strength
2 Consumer
3 Competitor
4 Situation

Core strength

Consumer Strategy

Competitive Strategy

Trend Influencers, Early Adopters, Early Mass, Late Mass

Situation Strategy

Momentum
Re-align
Fix It
Startup

Consumer profile

Target	Pro-Active Preventer Cookie Lovers
Description	Suburban working women, 30-40, who do not depend on their health. They are not health conscious. They are not health conscious. They are not health conscious.
Needs	They want to stay healthy. They want to stay healthy. They want to stay healthy.
Insights	They want to stay healthy. They want to stay healthy. They want to stay healthy.
Buying process	They want to stay healthy. They want to stay healthy. They want to stay healthy.
Desired Response	They want to stay healthy. They want to stay healthy. They want to stay healthy.

Consumer insights

A starting point for your thinking

"I feel _____ whenever I _____"

A human truth based on one of:
- underlying behaviors
- motivations/inspirations
- values or beliefs
- pain points
- emotions

A moment in the target's life
- A moment of strength or weakness
- Part of the day, week, year
- Celebration/milestone (birthday)

GRAY'S Cookies: "I feel guilty and disappointed in myself whenever I cheat with a cookie, I just wish they were less bad for you."

Positioning Strategy

Winning, Dumb, Risky, Losing

Consumer benefits

Functional Benefits: Works Better, Simply, Make Smarter, Correct, Make Healthier, Saves Money, Experience, Helps Family, Sensory

Emotional Benefits: Feel Free, Knowledge, Feel Myself, Comfort, Self Assured, Feel Liked, Optimism, Get Noticed, Control

Brand Positioning Statement

1 To (Target) - Suburban working women, 30-40, who put in the effort to stay healthy food.

2 Gray's (Category) - The healthy cookie option.

3 That is (Benefit) - The guilt free cookie that helps you stay in control of your health.

4 That's because (Reason) - Gray's helps you take control over what goes in your body by making smarter choices. Unlike other people who see Gray's as a dessert food, a cookie, we're a healthy, nutritious, and delicious treat.

Brand Concept

Brand Idea: Guilt free pleasure with Gray's Cookies

Consumer insights or entry: Main consumer benefit, Support points

Call-to-action: Try Gray's Cookies and feel your way to stay healthy.

One page marketing plan

Marketing Plan

Category	Issue and Challenge	Executive Plan
Brand	Brand awareness is low	Launch a new brand awareness campaign
Product	Product sales are low	Launch a new product sales campaign
Price	Price is too high	Launch a new price campaign
Promotion	Promotion is not working	Launch a new promotion campaign
Place	Place is not working	Launch a new place campaign

Vision, purpose, goals

Brand Vision: To be the best healthy cookie to generate the most revenue, profitability and sales of a mainstream cookie. Make Gray's a \$100 Million brand by 2030.

Our purpose: At Gray's, our purpose is to give people the cookie that will never let you feel guilty about eating. We know healthy can taste great.

2016 Goals:

Goal	2016	2017	Comments
Revenue	\$1.5M	\$2.0M	New revenue from 10% sales
Profit	20%	25%	Reduce costs by 10% and increase sales by 10%
Market Share	10%	15%	Expand into 5 new markets
Customer Satisfaction	80%	85%	Improve customer service and product quality
Brand Awareness	50%	60%	Launch a new brand awareness campaign
Product Sales	100k	150k	Launch a new product sales campaign
Price	1.50	1.40	Reduce price by 7% to increase sales

Finding key issues

Strategy Thinking: What's the core strength of your brand and why? How highly attached is your consumer to your brand? What is your current competitive position? What is the current business situation of your brand?

GRAY'S Cookies Key Issues: How do we shift Gray's from a product-led brand to a brand-led brand? How do we drive consideration and trial in our target market? How do we defend against any of our competitors? How do we keep growing momentum by closing the identified gaps in distribution?

Strategy page

Strategy #1: Drive trial by advertising Gray's "stay in control" positioning

Strategic Objectives: Increase Gray's "stay in control" positioning in the "guilt-free" category to reach consumers in consideration of the top 3 competitive brands.

Goals: Increase penetration from 15% to 20% (specifically achieve 15% to 20% in the core target market) by the end of 2016.

Tactical Program: Increase trial by advertising Gray's "stay in control" positioning. Increase trial by advertising Gray's "stay in control" positioning. Increase trial by advertising Gray's "stay in control" positioning.

Execution plan

Brand Communications plan

Communications Strategy: Advertising Gray's "stay in control" positioning in the "guilt-free" category to reach consumers in consideration of the top 3 competitive brands.

Target Market: Suburban working women, 30-40, who put in the effort to stay healthy.

Brand Idea: Guilt free pleasure with Gray's Cookies.

Main Benefits: Guilt free pleasure with Gray's Cookies.

Support Points: Gray's is the best healthy cookie. Gray's is the best healthy cookie.

Media Options: Main creative will be TV. Secondary spots will be specialty food magazines, event signage and in-store sampling.

Brand strategy roadmap

Brand Strategy Roadmap

Brand Vision: To be the best healthy cookie to generate the most revenue, profitability and sales of a mainstream cookie. Make Gray's a \$100 Million brand by 2030.

Our purpose: At Gray's, our purpose is to give people the cookie that will never let you feel guilty about eating. We know healthy can taste great.

2016 Goals: Revenue \$1.5M, Profit 20%, Market Share 10%, Customer Satisfaction 80%, Brand Awareness 50%, Product Sales 100k, Price 1.50.

Advertising process

1 Strategy: Pre-work, 2 Creative Brief, 3 Creative Meeting, 4 Ad Testing, 5 Production, 6 Post Production.

Creative brief

Creative Brief

Brand Vision: To be the best healthy cookie to generate the most revenue, profitability and sales of a mainstream cookie. Make Gray's a \$100 Million brand by 2030.

Our purpose: At Gray's, our purpose is to give people the cookie that will never let you feel guilty about eating. We know healthy can taste great.

2016 Goals: Revenue \$1.5M, Profit 20%, Market Share 10%, Customer Satisfaction 80%, Brand Awareness 50%, Product Sales 100k, Price 1.50.

Judging advertising

Branded Breakthrough + Motivate Consumers = Attention + Brand Link + Communication + Stickiness

Concern	Strong	Very Strong	
Motivate Consumers	Poor	Moderate	Strong
Attention	Very Poor	Poor	Concern

Advertising Checklist

Creative Advertising Checklist

Brand Vision: To be the best healthy cookie to generate the most revenue, profitability and sales of a mainstream cookie. Make Gray's a \$100 Million brand by 2030.

Our purpose: At Gray's, our purpose is to give people the cookie that will never let you feel guilty about eating. We know healthy can taste great.

2016 Goals: Revenue \$1.5M, Profit 20%, Market Share 10%, Customer Satisfaction 80%, Brand Awareness 50%, Product Sales 100k, Price 1.50.

Innovation process

1 New Ideas, 2 Build pipeline, 3 Launch plan.

Innovation Checklist

Innovation Checklist

Brand Vision: To be the best healthy cookie to generate the most revenue, profitability and sales of a mainstream cookie. Make Gray's a \$100 Million brand by 2030.

Our purpose: At Gray's, our purpose is to give people the cookie that will never let you feel guilty about eating. We know healthy can taste great.

2016 Goals: Revenue \$1.5M, Profit 20%, Market Share 10%, Customer Satisfaction 80%, Brand Awareness 50%, Product Sales 100k, Price 1.50.

Business review

Marketplace, Consumers, Channels, Competitors, Brand

Business review summary

Brand Challenge: The brand is not working. The brand is not working.

Analytical summary

Drivers	Inhibitors
Factors of strength or inertia that accelerates your brand's growth.	Weaknesses or friction slows brand down, leak to fix.
Opportunities	Threats
Changing consumer needs, technologies, channels, legal.	Competitor launch, trade barriers, customer preference.

Brand funnel analysis

Ideal analytical slide

Gray's taste drives a high conversion of trial to purchase (85% versus a norm of 50%).

Supporting visuals to tell the story: Gray's taste drives a high conversion of trial to purchase (85% versus a norm of 50%).

Continue to look at driving trial, because the great taste drives high conversion to purchase.



Consumer Marketing Training

**We empower the ambitious
to achieve the extraordinary**

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