

The Ethos Good Brief Worksheet

*Have a **cause marketing activation** on the horizon?*

*Want your **social impact** to count?*

Gather key stakeholders and work up a **Good Brief**, a blueprint of your strategy for creating real social impact with your cause marketing campaign.

By the end of this exercise, you will have in hand:

- A mission statement describing what social issue and audience you will be working with and for how long.
- A roadmap of how you will engage with this issue based on your unique positioning and competencies.
- A list of impact and cause marketing deliverables tied to your goals.
- A comprehensive “good brief” that you can literally cut and paste into your creative brief!

The What

1) Step One: Identify Your Company's Goals

a) What product or service will be promoted through your cause marketing campaign?

b) Who is the key audience for your cause marketing campaign? How can they best be reached?

c) What is the timeline for social impact (i.e. a single activation or a multiyear engagement)?

d) What will you use to measure success (i.e. sales, media, philanthropic impact)?

2) Step Two: Identify Your Company's Impact Opportunity

a) Does your product or service lend itself to a specific issue? If so, which one(s)?

b) Is there a timely issue your brand wants to engage with? If so, which one(s)?

c) Is there an issue that's particularly important to your key audience? If so, which one(s)?

- d) Is there an important issue related to your community/workforce? If so, which one(s)?

With these opportunities in mind...

- e) Which issue do you want to focus on?

3) Step Three: Draft Your Mission Statement

The goal of this cause marketing campaign is to promote (product/brand) _____ to (audience) _____ in order to positively impact (issue area) _____ over a (time period) _____ time period.

The How

4) Step Four: Identify How to Maximize Your Company's Social Impact

- a) Does your company engage in this issue already? If so, can that engagement be leveraged?

- b) How is this issue connected to current events? Are there any natural opportunities for a related activation?

- c) Internal resources: Does anyone within your organization have expertise in this issue? How can you bring them in?

- d) External resources (Learning): Who can you directly reach outside of your organization with expertise in this issue (i.e. nonprofit leaders, academics, community leaders)? What can you learn from them?

- e) External resources (Partnering): Who can you partner with (i.e. nonprofits, elected officials, universities)?

5) Step Five: Identify How Your Company Can Support This Activation (check all that apply)

- ☐ Money (flat donation, % of sales, etc.)
- ☐ In-kind donations
- ☐ Employee volunteerism
- ☐ Visibility
- ☐ Leadership
- ☐ Related supply chain management
- ☐ Other _____

Once you and your stakeholders have completed Steps One through Five and have agreed upon a working concept for your social impact activation, spend the necessary time to do the legwork and identify desired outputs.

After you've brainstormed and identified your desired outputs, you're ready for Step Six!

The Work

6) **Step Six: Finalize Your Good Brief. This is the section you can literally cut and paste into your creative brief. Make sure to include the following key elements:**

a) Final **mission statement** (Repeated from Step Three for ease of use)
The goal of this cause marketing campaign is to promote (product/brand) to (audience) in order to positively impact (issue area) over a (time period) time period.

b) List of **intended beneficiaries** and **social impact partners** (See Steps Four and Five)

To make this work as meaningful as possible, we will be partnering with...

<u>Partners</u>	<u>Partnerships</u>

<u>Partners</u>	<u>Partnerships</u>
<i>Nonprofit</i>	<i>Donation + Employee Volunteer Opportunity</i>
<i>Elected Official</i>	<i>Legislation</i>
<i>Academic</i>	<i>Research</i>

c) Specific **deliverables** and **timelines** (to be inserted below)

d) Specific **cause marketing assets** you will use (to be inserted below)

Our efforts, which we hope to amplify with stellar creative work, include...

<u>Deliverable</u>	<u>Timeline</u>	<u>Cause Marketing Asset Needed</u>
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<u>Deliverable</u>	<u>Timeline</u>	<u>Cause Marketing Asset Needed</u>
<i>Donation to Nonprofit x</i>	<i>Q1</i>	<i>Press Release + Social Campaign</i>
<i>Volunteer at Nonprofit x</i>	<i>Q2</i>	<i>Internal Communications Plan + Video</i>
<i>Legislative Action Plan</i>	<i>Q3</i>	<i>Op-Ed + Social Engagement Strategy</i>
<i>Academic Research</i>	<i>Q4</i>	<i>Report + Op-Ed</i>
<i>Thanksgiving CTA</i>	<i>Q4</i>	<i>Social Campaign</i>