



CSI: MARKETING

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Marketing is like forensics; the devil is in the details -- more detail in the design of a marketing brochure, and less detailed information in the content.

A financial firm is sized-up at a glance based on the first impression of its brochure. A crucial element of the design for any marketing material is the ability of the reader to 'scan' it quickly and understand the important points about a firm.

In an informal survey of 20 client prospects Howard Gendel, a consultant with the financial services industry, found some surprising results about what constitutes effective marketing material.

As reported by Andrew Gluck in the April 2006 issue of *Investment Advisor* magazine, the survey was designed to find out what type of materials conveyed credibility, had an immediate impact on the client, and got the message across.

While the entire survey also covered issues specific to retail marketing, this summary will focus primarily on recommendations which are relevant to institutional marketing.

...A FINANCIAL FIRM IS SIZED-UP AT A GLANCE BASED ON...ITS BROCHURE...

▶▶ Size isn't everything

While reviewers generally discounted a 'slim jim' (tri-fold 8 ½ x 11 page) as being too insubstantial, they ranked a simple 12 x 17 inch bi-fold brochure and a simple presentation folder style brochure as conveying the same credibility as a 16 page brochure with heavy cover stock. Readers are not interested in a long brochure if they can get the same amount of information from a shorter version. Conclusion: as an introductory piece a 16 page brochure may very well be overkill, and costs 5 to 10 times more to produce.

▶▶ When is an image really worth 1,000 words?

Stock photos are effective, but pictures relating to abstract concepts often fail to make their point. Though often considered corny and not very sophisticated, photos can provide an immediate connection for the reader. Images of eagles soaring, to represent freedom and independence, or pillars to depict stability and strength, usually aren't effective in communicating ideas about the business.

▶▶ Focus on key elements

Readers are going to scan a brochure looking at photos, headlines, charts and tables. These key elements in the brochure must be easy to read and understand. Charts and tables need to be especially simple and clear. On their own, most readers will give any given item only 3 to 4 seconds of attention. Even when used for a presentation, the chart or table should not be so complex that the reader spends more time interpreting the data than listening to the explanation!

▶▶ Make a point

Reading long blocks of prose is difficult, so concepts should be broken down into bullet points to make the brochure easier to scan. However, bulleted lists should be no longer than 5 or 6 items, so break them up with explanatory sentences or other key elements described above.

FOR DETAILS ABOUT THE SURVEY, AND A FULL DESCRIPTION OF ITS CONCLUSIONS, PLEASE SEE "BASIC MARKETING RESEARCH" BY ANDREW GLUCK (ADVISOR PRODUCTS) IN THE INVESTMENT ADVISOR MAGAZINE, APRIL 2006 ISSUE.

