



Staying close to brand planning in a remote world



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While many of us are still spending our days Zooming away in “COVID casual,” the work hasn’t slowed—and neither has your brand planning. In-person meetings are essential in gathering your cross-functional stakeholders together for key input and brainstorming, however there are still effective ways to build excitement and gain key insights through effective planning, coordination, and technology. **In this installment of Overcoming COVID-19, we highlight the best practices to supercharge your brand planning meetings.**

The critical components of brand planning haven’t changed during COVID-19. We still need to establish and distill the essence of your:

- **Purpose:** vision and mission
- **Positioning:** where you fit in the hearts and minds of your target, in the context of competition
- **Promise:** what you will deliver in the long term
- **Personality:** attributes, values, and voice, being careful on what you lean in on given what people are experiencing and feeling today

Although these pillars of planning remain important, you will need to think about how our new remote environment impacts how you frame them. For example, the competitive field may be shifting due to COVID-19 delays of new entrants. How does that impact your positioning?

Effective brand planning in today’s environment requires a real **commitment to collaboration and communication**. Below, we’ve included best practices for brand planning remotely as you consider how convenience, access, and safety may take on new meaning and importance for your brand in the year ahead.

Establish ways of working. Without the fluidity of live, longer running sessions, stakeholders must be in constant communication before, during, and after remote workshops. Before kicking off, work together to develop the agenda for your workshops and align on clear methods of communicating feedback to and from all key stakeholders using digital platforms, video co-creation, interactive surveys, and live collaboration documentation formats (ie, Google Docs). We recommend relying less on polished POVs and focus on working together earlier in the process for efficient and productive planning.

HELPFUL TIP:

Create a template for email subject lines:

- FYI ONLY
- FOR REVIEW
- RESPONSE NEEDED
- ACTION REQUIRED

Align on expectations. Work with your agency to balance the frequency of touchpoints with the diligence of connecting the right stakeholders at the right time. We recommend developing a protocol for who should be in what meetings and involved in which workstreams. By respecting everyone’s time, and activating stakeholders only when needed, we gain more engagement in the long run.

Assign pre-work. More than ever before, it is critical to take advantage of offline pre-work as the heads down, individual think time. At Evoke, we use workshops as a place for group discussion and alignment.



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We know everyone learns differently, so we give stakeholders the right background ahead of time, with options on videos, articles, and FAQs. We recommend all stakeholders be conscientious of being specific in what they ask and give examples of what they need. Additionally, we will assign actual homework via surveys and create stimuli ahead of the workshop so we can use the most of our time together.

Here are six key steps to facilitate an effective remote workshop:

- 1 Kick off strong:** Align on expectations from the outset; make sure that everyone understands the goals of each work session, knows the roles each person is to play, and agrees on the expected outcomes. Encourage the use of chat functionality and set other “house rules” for the workshop.
- 2 Break the ice:** An opening “tech check” icebreaker poll is a great way for people to warm up to the interactivity coming. Long-winded, around the room icebreaker questions take up too much time in a condensed session, so polls allow for interaction and fun in a snap or a click. Other options include showing a brand vision video or using music as everyone logs on.
- 3 Leverage technology:** In addition to using video conferencing platforms with built-in chat and live collaboration, such as Zoom or Teams, we recommend integrating a few tools to facilitate greater engagement. For example, MURAL and Miro are powerful platforms for brainstorming, workshoping, and collaborating—creating digital whiteboards, where the host can focus people’s attention to specific areas of the screen and attach virtual sticky notes. And while Zoom and Teams can facilitate seamless, smaller breakout sessions, the addition of a polling tool such as MeetingPulse or Poll Everywhere support more focused breakouts with live data collection and feedback. Most platforms have also evolved to integrate seamlessly with live document platforms like GoogleDoc, Sharepoint, and OneDrive.
- 4 Assign roles:** Assign one moderator to facilitate, screen share, and add notes live to slides or virtual white boards. While the moderator focuses on keeping the conversation going, assign someone else to take notes and watch the clock.
- 5 Use live sessions efficiently:** According to BBC¹, video chats are shown to expend more energy than live meetings. Individuals need to work harder to process non-verbal cues like facial expressions, the tone and pitch of the voice, and body language; paying more attention to these consumes a lot of energy. To keep engagement strong, break up your agenda into shorter sessions that are no longer than 2 hours each. It can also be helpful to schedule smaller break-out assignments for groups within the same department, or same time zone, who can benefit from working more closely with each other.

Bear in mind the wide adoption of collaborative tools has also made some brainstorming sessions asynchronous, and workshops may not need to be conducted 100% in real-time. For example, assigning pre-work on collaborative platforms with set deadlines could allow team members to work independently, and effectively without silo—making remaining live sessions more efficient.

- 6 Close it out:** Because your time is condensed, you will only have a few minutes instead of the longer stretch to wrap up and discuss the next steps. Be prepared with this list for viewing and send as a follow up with a clear assignment for those who are responsible for action.

Open and smart collaboration, along with purposeful and respectful communication, are the best ways to make remote workers feel closer. And the best way to open up your brand planning with a remote team.

If you need help in thinking about how to implement these steps into your brand planning approach, or would like to learn more, please email us at business@evokegroup.com.