

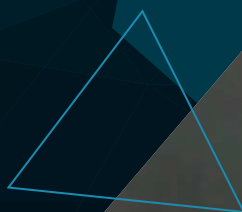
Research  
Commercialisation  
Toolkit

# Aspect

## Go to Market Communications Strategy for Social Science Project

Prepared by Dr R C Watson  
(Director, Greenoak Innovation Ltd)  
for the Aspect Research  
Commercialisation Community  
of Practice

August 2021



## Introduction

This tool is intended for use by the Innovation / Knowledge Exchange Office in conjunction with the academic team presenting the opportunity so they can plan and share tasks to promote the project. The tool is deliberately generic and can be applied to;

- early opportunities for licensing or spinout that need promotion to secure first customers,
- existing opportunities to win additional customers or
- to attract industry / sponsors to continue an opportunity's internal development prior to external launch.

As such the language used below should be modified as appropriate to your specific needs. For example would be more useful to use the name of your project, or limited company or social enterprise in the following examples, depending at what stage the promotion is taking place.

A useful marketing communications approach involves the following processes;

## 1. Define the objective of the marketing exercise

### What is the overall purpose of the exercise?

If the project is in its early stages and has not obtained its first customer then this is the initial objective. If you have already established that the original idea is valid and thought viable then have you already identified key initial customers as potential marketing targets?

Alternatively if the project is already up and running as a consultancy or spinout company, then do you want to sell more of a particular product or service?

What is the budget for the marketing campaign and what commercial results are hoped for if this investment is made? Do you want to generate more income (turnover) or increase profit?

### Exercise – Discuss and Write down your Marketing Objective

## 2. Who is the target customer?

Who is the target customer? Where are they? (geographically, or where do lots of members of this target group gather? – this could be either physically, or online, or both). For example do they group together in a professional society, networking group, have an annual conference etc? In this way you can potentially target a larger number of potential clients all at once – this might suit smaller budgets.

What does a stereotypical customer group want / think / desire?

'Customers' may include other groups that you need to persuade or influence to support your enterprise – e.g. funding bodies / sponsorship / other supporters such as volunteers. It may also include other groups who have an influence on your target audience – e.g. if selling a service or product designed for children then you usually have to also influence and 'market' to parents – they hold the money and help make the decisions. There may be other groups – e.g. the beneficiaries of your service may not be the ones who directly 'pay' for it.

### Exercise – Discuss and Write down your Key Customers (Stakeholders, Funders, Influencers, and Partners)

## 3. Determine the messages you want to communicate

What are the key messages you want to communicate to the above customer group(s)? What is the key message you want to communicate to them about your company and the opportunity? Customers do not buy in a vacuum, and will probably want to know about the *company / organisation* that they are buying from, as well as the product or service being offered. Your reputation / brand name is important in this regard as it helps the customer establish who you are and whether they can trust your company to deliver what they are buying.

Also – What are the key benefits that you want to draw to the attention of the target group about our product or service? (bearing in mind the objective you have set above in 1.) What do you think will motivate them to investigate your offering? (a message that builds on the target group's desires and needs, a case study of an earlier customer or project that had a successful outcome – to persuade them that you have some experience in delivering this type of service, even if

initially as a research / pilot project not as a commercial offering.)

Do not assume that because you believe that your product or service is worth supporting that everyone else will automatically agree with you. Understand 'what's in it for your customers' and do not assume that they will purchase **purely** based on the one element you think is important – they may be tempted to buy for many other reasons – cost, quality, convenience, etc, not just to support a social cause. Similarly do not get too upset if what you are offering is not for them – listen to the reasons why they will not buy and learn what you can to improve your offer for next time – upsetting them means you have lost them as a potential customer for good and stopped the possibility of them referring you to others – and that would be a shame.

**Exercise – Discuss and Write down the key messages you want your target customers to receive and understand – about your company, and about your product or service offering? (TIP: keywords can be a useful starting point to craft into a neater, shorter, message later)**

## 4. Determine the most effective way(s) of communicating the message

What types of communication media are the target audience exposed to regularly? This could be a wide range of physical media (such as leaflets / posters in key locations, adverts in print, letters written to them) or e-media (website postings, blogs, online adverts, email shots, social networking areas etc.) What blogs, newspapers or magazines are likely to be read by the target group? Do specific publications target your group?

Many media providers (publishers, websites, audience calculations etc) will give you information on their readership / audience with a breakdown if you express an interest in advertising with them, this will help you decide if they attract the right sort of audience for your idea.

What are the costs of each media type, and how does this fit with your budget?

You may also be able to get some press coverage for free – but usually only if you are 'newsworthy' remember that publications cannot give you free press in case it upsets their paying advertisers – you need to give them

an 'angle' to cover you as a story.

Your host institution may be able to give you a boost initially via their press office. Stories based on your launch as a spinout company also makes the University look good and this may at least get you noticed by journalists, and they may do a follow up if you cultivate the relationship.

**Case studies** of your previous successful delivery of your product or service with other customers – especially those who are directly relevant to your intended customer group are a powerful tool – no one wants to be the first to experiment with a new thing – customers take comfort from seeing how well you have delivered in the past with similar customers to themselves. Always get permission from the customer to feature them in a case study and get their approval before circulating. (see separate section on Case Study tool / development below)

**Exercise – Discuss and Write down what media would be best for your different target groups – see calendar example below**

## 5. Schedule a series of messages, using different media targeting the audience

It is best to communicate your messages consistently across a number of different media, with a reasonable frequency to the target group of customers. This is because it is rare that you will hit the right customer, at the right time, with the right need, to result in an enquiry or order on the first exposure to your message.

A series of messages, transmitted by different media, in a reasonably timescale (e.g. a few exposures to your message within a week or two) to a wider audience of relevant contacts gives you a better chance of hitting a potential customer in a buying frame of mind.

Don't expect to put a single advert in a magazine and get instant results, as you will be lucky if you do. But for example, a small, regularly placed advert to the target group, backed up by some strategically placed leaflets, posters, and maybe blogs, an email shot, together with a pdf leaflet to email to enquirers, could reinforce the message and result in a better response rate.

Each message will 'build' on the previous one, so consistency of message helps to avoid confusion. So

don't be tempted to try to sell everything at once, and confuse the potential customer. Once you have sold something to them, then they can be introduced to other products and services you offer, the point of this exercise is to draw their attention on your strongest product or service offering, and get them to contact you to find out more.

It is often a good idea to consistently put your website address on all media choices made – this enables you to back up your messages, give more detail on your range of services that a small advert will not have space to do. It also often allows customers to buy immediately from you if your product lends itself to this, and if you are set up for e-commerce, or at least enquire to find out more

Again, budget comes into play here; Can you target the customer group, ideally multiple times with the same message, for a reasonable cost? Will this generate a reasonable return, in terms of enquiries, that you then have an opportunity to turn into sales?

## 6. Carry out the campaign

What advertising materials need to be produced? Can the artwork be done in house or will a designer also need to be budgeted for? What media choices have been made and what are the costs? What schedule has been set, and what deadlines need to be met to ensure that everything comes together in the schedule you are aiming for?

**A plan in the form of a calendar such as the one shown at the end of this section may assist in this scheduling. Tasks can be allocated to different team members to spread the workload and coordinate efforts.**

## 7. Monitor the results (and modify approach as required)

This can be done in two ways – direct or indirect measurement. Direct responses, can be directly attributed to the media used – e.g. you put a response code on a postcard or leaflet you send out – e.g. Quote XXX123 for a 10% discount on your first order. Response codes might be different for different media e.g. on your posters you might say 'Quote XXX10% for a 10% discount – so when an enquiry comes in, you know whether it is your leaflet or your poster that has generated that particular lead.

Indirect methods of measurement, might include e.g. measuring the number of visits to your website, likes on your media posts etc – are they going up 'in general' following your advertising campaign? Are these visits resulting in more email enquiries from your website? – You may not know exactly where they are coming from (e.g. from your posters, or your leaflets, or your email shot) but you know that 'something must be working' Are sales increasing of the products that you are promoting – again you know its probably down to the general marketing campaign, but do not know always what media types are working best for you.

A mix of direct and indirect methods may be best to suit you – just simply asking customers where they heard of you when they make an enquiry is a simple easy to remember method of getting some feedback on what media types are working best. **Think about how you might monitor what marketing works and what doesn't work in your circumstances using the media choices you have made.**

## Marketing Plan – 2021/2022 – Example

TARGET GROUP		ACTIVITY / MEDIA	COST	MONTH											
Customer Group 1 50% of budget	Customer Group 2 50% of budget	Example Media choices		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
X	X	Networking Events	£250	£50			£50			£50			£50		£50
X		Case Study (see below for case study tips and template)	£200		£50			£50			£50				£50
X		Newsletter entries	£400			£100			£100			£100			£100
X	X	Pay per click campaign	£300	£25	£25	£25	£25	£25	£25	£25	£25	£25	£25	£25	£25
X	X	Website updates	£300	£25	£25	£25	£25	£25	£25	£25	£25	£25	£25	£25	£25
X	X	Conference / Exhibitions	£500				£250		£250						
X	X	Adverts/ Advertorial	£200			£50			£50			£50			£50
		Facebook page / advertising / Community website													
		Twitter / Instagram													
		<b>TOTAL</b>	<b>£2150</b>												

## Case Study – notes for guidance

### The development of case study materials for use online or elsewhere

Case studies – mini-stories or blogs about your new opportunity's work with customers, can be a useful way to promote it to new prospective customers. The fact that another customer is prepared to be named in a case study shows new prospective customers that they are satisfied with the product or service offered by the opportunity, and this can give them additional confidence to also buy it – *providing that* the story is made relevant to them in their circumstances. i.e. it appears it will help them solve one or more of their problems or address one or more of their needs.

There are no set rules for writing a case study, and you can be as creative as you like, but the main point of using these as a tool to persuade other new customers, who perhaps are less familiar with your opportunity and its benefits must be kept at the front of your mind.

## A typical case study format

Most case studies will follow a similar format;

1. A 'headline' – (think how newspapers grab your attention) can be useful to put at the top of the sheet. If this includes a pun, play on words or other 'gimmick' then so much the better, providing it matches your company's image (no too rude jokes) – You want to encourage curiosity in the reader so they read more. In a busy world you are vying for attention with other distractions.
2. A picture or image(s) – your logo next to the client's, an interesting photo that is relevant to the story, but perhaps with a twist can also maintain attention of the reader. Sometimes three / odd number of images looks better than a single image.
3. Mention the client's name – especially if it is a prestigious one, upfront in the text to hold onto the prospects attention and encourage them to read more.
4. Briefly outline what the customer does, and the customer's problem / challenge was – you do not necessarily want to go into in-depth technical details



here (unless directly relevant) – a general overview with the basic issues that the problem posed should be sufficient.

5. Next – how did you solve the problem? Mention any particularly creative solutions or interesting ways you overcame the problem. Did you do it in record time? Or use a special technique or strength of your company to achieve the solution?

Take care not to 'reveal all your secrets' here – you want new customers to get in contact and see how you can help – not try to replicate your previous solutions themselves. Worse still a competitor could potentially replicate what you have done.

This approach differs from work in academic settings where publication and details of the methodology and solutions are part of the publications – here you need to retain some of our competitive advantage by not revealing exact details of how you solved the problem and the methods you used.

6. Get a quote from the customer (they will need to approve the case study if it mentions them by name) saying how the solution you put in place helped them / solved the problem / saved them money, time, effort, won them an order etc. The key here is how they **benefitted** directly as a result of your efforts. These should be aligned to those benefits you wish to communicate to prospective customers – so the benefits are consistent across all your marketing messages.
7. Depending on space, or the absence of a customer quote, you could put your own quote in about how you solved the problem or issues, challenges that were overcome.
8. Then add a small paragraph about your company and its other capabilities – to illustrate the breadth of the products and services you offer.
9. Lastly, a '**call to action**' – you need to urge the prospective customers reading this to 'act' on what they have read. This could be a number of things – visit your website – call you for a quote – ring for a chat about their project – the main thing is you 'direct' the customer what to do next – rather than have them read the case study, and run the risk that they do nothing after they have read it!

## Using Case Studies

The same 'case' can sometimes be re-written in different ways to highlight different aspects of your product or service, and therefore you can build up a number of cases from relatively few jobs to illustrate different key benefits of doing business with you. E.g. one version of the case study might indicate a service element of your overall offering; another version might highlight the industry where the customer operates, a third might illustrate a competency in a particular technique or methodology.

You can then choose the case study with those key benefits that are most appropriate to use in a given circumstance with a new prospect. Perhaps the case study can be written two different ways when the customer is putting it on their own website or social media – one where you are the 'star' for your own use, and one where the customer is the 'star' for their own use, but you still get a mention, and a link to your website? That way both companies benefit from one amount of effort and a few 'tweaks' like different photos and logos?

Some bigger companies have their own internal and external communication department and so may wish to promote the case study themselves – e.g. to their employees as a means of educating them as to what the company has been doing, how they are helping (say for a corporate socially responsible project) or externally as a means of attracting their own new customers (because it shows them as being forward thinking, working with some exciting companies and at the cutting edge of what they do).

A case study can be used in a number of different ways;

1. **On your website or social media as a 'blog' or posting** – to inform prospective customers – let them download it to use internally (perhaps they have to show it to someone else to make the decision to use you.)
2. **In front of customers** – to illustrate your capabilities in a particular industry, technical area, with a certain size of customer etc.
3. **Following a sales call** – to back up what you claimed in the call with evidence of your capabilities – **"I'll email you a case study of ours where we solved a similar problem for X"** – looks good if you back up a call well, and gives you a good excuse to gather the prospect's email address (but don't forget GDPR)

4. **Blown up as a poster** – for a trade exhibition, networking event or conference
5. **As part of a literature pack to leave with a customer** – shows that your marketing material is not ‘all talk’ – but that you can prove your capabilities with a real customer.
6. **As the basis for a public relations piece** – to release to the trade press / local newspapers etc as part of a bigger marketing plan (although bear in mind the different audience here – not just prospective customers, but other readers, so it has to be news worthy and relevant to them) e.g. if you were putting an advert in the local paper and wanted them to mention you in their editorial / advertorial (though some papers will do all this for you)
7. **As part of an email shot to prospects** – again as part of a bigger marketing strategy. For example you might send a relevant case study pdf or link to the page on your website by email, or post it to a new client, or send them it through a social media message (this is where social media ‘followers’ can be important as they can be automatically be notified you have posted something new.)
8. **As a social media posting** – try to make these short and punchy and visual – using either video or pictures or short blocks of text – not too much as people have short attention spans and lose interest easily. Instead of posting the whole case study – why not post a short teaser paragraph and invite interested parties to view the full case study on your website to drive traffic? You could put the picture element on Instagram, tweet a quote / link, try to use complementary social media linkages and messages to win more traffic from different sources.

## Points to remember

**You should always write the case study, and present it to the customer for approval prior to any release** – there is nothing worse than an irate customer who is not happy about the fact you have used their name without permission, or got some detail wrong or out of context – always seek permission and get their agreement in writing.

**Permission is often required to use customer’s logos, images, trademarks** – you do not want to release any sensitive information about the customer or its operations or use their intellectual property / images /

trademarks without permission. Stock images can be bought for this purpose if you do not have your own, or you could hire a photographer to take some images for you – but make sure they sign over all rights to use the photos to you as part of the contract. Maybe take your own photos – phone cameras are pretty good nowadays, and sometimes a picture can be altered or made more interesting using one of the many ‘filters’ or camera effects on the phone – e.g. black and white, coloured filters, etc

**Write the case study fairly** – do not over exaggerate – but also do not be too modest.

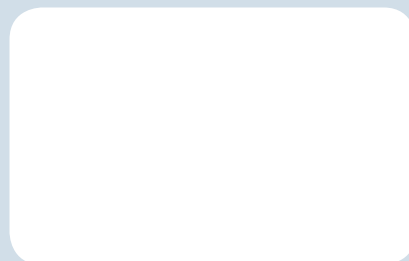
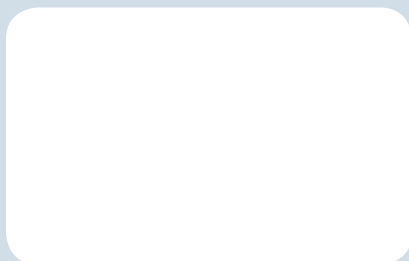
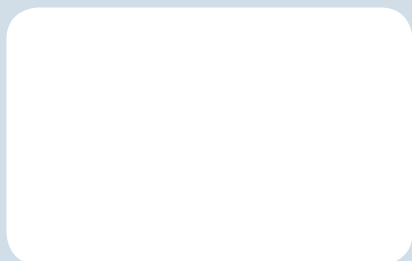
**Use a consistent format for the case study – consider preparing a template** – say a one pager laid out in the same way each time with good quality photographs at an appropriate scale (not blurred or pixelated). There are many sources of images on the internet for commercial use – where you can pay a small fee for high quality images in your industry. Try to be creative though and use keywords that symbolise what your benefits represent – you don’t always have to use ‘literal’ images – the more curious the better.

**The case study should be in the same style as your website / social media** – so the image of your company is not seen to be variable and each media reinforces the other. You may wish to leave more than one case study with a customer, so it looks odd if they are not similar in layout and style. A graphics designer could help you to set up a template and get this right, but you will usually need to supply the content, especially the technical and commercial elements.

**Lastly but most importantly – respect people’s wishes when it comes to marketing preferences. GDPR regulations means you should give people the option to unsubscribe from your emails other other marketing (telephone, SMS, post) and respect their data in other ways – always ask permission before including quotes, company names, trademarks, images of people and places that do not belong to you – if you do you might be surprised that they will help you by promoting your messages through their own channels – re-posting your articles or helping you in some other way. If you do not you run a very real legal risk that they might object to your use of their materials or name – and that will defeat the purpose of your efforts as a reputable company.**

See below for an example case study for the fictional 'Health Chances Ltd' spinout company.

## Health Chances works with Wellbeing Inc to launch new service



Health Chances – the spinout company from the University of Lanchester has recently launched a new surveying tool for evaluating health inequalities with Wellbeing Inc, the US based Health Screening company. The tool helps assess different populations for their likelihood to take up the offer of health screening programmes whether these are privately or publically funded. The tool identifies inequalities across different geographic areas using a unique artificial intelligence method that informs planners and deliverers of health screening, saving them time and money by avoiding costly planning and capacity mistakes. The tool also shows public health advocates where to focus their efforts when promoting screening opportunities.

Founded by leading health care researcher and CEO Helen Watson, Prof of Social Health Sciences, at The University of Lanchester Health Chances is a health survey company specialising in;

- Bespoke survey tools and techniques, both online and face to face
- Artificial intelligence statistical methods
- Advanced data acquisition and data consent management
- Fully GDPR compliant market research

Our development of leading survey tools is recognised by clients such as the WHO, NHS, Health Insurance providers and International Charities including the Red Cross and Save the Children.

Head of Screening programmes at Wellbeing Inc, Dr John Taylor said *'By working with Health Chances we identified new opportunities to reach out to populations of new patients who hadn't considered or who had resisted health screening before. By identifying some of the reasons behind their decisions we were able to change our messaging and uptake of screening opportunities. This has resulted in an extra 10,000 scans this year alone that has resulted in detecting 200 new cancer cases earlier, leading to earlier treatment and better outcomes for those patients'*

**To find out more about Health Chances Ltd unique survey methods and analysis get in touch now to discuss your specific needs. T: TEL: +44(0)XXXX XXXXXX, E :info@healthchances.com see our service offerings at [www.healthchances.com](http://www.healthchances.com)**



## About Aspect

Aspect (A Social sciences Platform for Entrepreneurship, Commercialisation and Transformation) is a network for organisations looking to make the most of commercial and business opportunities from social sciences research.

Supported by Research England's Connecting Capability Fund, Aspect members sit at the epicentre of discovery, imagination and progress in the social sciences. We draw together pioneering academics with innovative industry leaders to tackle the most complex societal challenges of our time.

Find out more at [www.aspect.ac.uk](http://www.aspect.ac.uk)

# Aspect

Transforming Society Through  
Social Science Innovation