



Advance Now Marketing Workgroup Report

I. TEAM

A. Co-Chairs

Kevin Hickman, JP Cullen & Sons

Katie Kennedy Shepherd, Boomtown Communication

B. Members

Pam Christopher, Monroe Chamber of Commerce

Kristine Euclide, Madison Gas & Electric

Vic Grassman, Blackhawk Technical College

Bill Johnston, Wisconsin State Journal, MREP Board

Bruce Kepner, Alliant Energy

Diane Morgenthaler, Greater Madison Convention & Visitors Bureau

Ruth Rohlich, City of Madison

Mayor Paul Soglin, City of Madison, MREP Board

Diane K. Walleser, Madison College

Kennan Wood, Wood Communications Group

Heidi Zoerb, UW-Madison Agriculture and Life Sciences

C. Contracted Consultants

Rod Hise, The Luminis Group

Jela Trask, Nelson Schmidt

D. Madison Region Economic Partnership (MREP) Staff Representative

Betsy Lundgren, Vice President, Marketing

II. WORKGROUP BACKGROUND/RELATION TO ADVANCE NOW

The *Advance Now* Strategy clearly identifies the essential need to tell the Madison Region's story. Though the region has tremendous assets and opportunities for business expansion and attraction, no entity has made an impactful effort to tell the world – or even the region itself – about them. *Advance Now* calls upon MREP and its partners to lead the charge in marketing the eight-county region for economic development purposes.



Given this directive, the Marketing Workgroup recognized that the region must first define its story by determining a focus that accurately heralds the region's strengths and embodies each of our eight counties. Though the *Advance Now* Strategy details tactics and actions for telling the story, it does not identify the specific content of that story. Thus, the Marketing Workgroup's transformative idea lies within the focused development of that story.

In addition, the Marketing Workgroup operated under direction from MREP that the region's brand should align with the statewide *In Wisconsin* business climate brand championed by Wisconsin Economic Development Corporation. This brand was built with an eye toward regional customization and adoption to ensure consistency of message across the state's extended enterprise of economic development partners.

III. TEAM WORK PLAN

The Marketing Workgroup held four meetings in March and April 2013, with additional planning meetings taking place between the workgroup co-chairs and MREP staff.

- March 12, 2013: Reviewed *Advance Now* Strategy and workgroup framework; discussed roles and responsibilities of workgroup members; provided input to contracted marketing agency Nelson Schmidt based on *In Wisconsin* brand triangle; began to define focus of region's story
- April 2, 2013: Discussed target audience, marketing strategies, and year-one priorities
- April 16, 2013: Reviewed creative brief from Nelson Schmidt; previewed public relations plan framework from contracted public relations agency The Luminis Group; discussed other year-one implementation items
- April 30, 2013: Brainstormed possible success stories and process for establishing success story clearinghouse; provided feedback to Nelson Schmidt on region name, logo, and draft creative concepts

IV. CRITICAL RECOMMENDATIONS

The Marketing Workgroup delivers the following recommendations to MREP in its collaborative efforts to tell the Madison Region's story. The group made key decisions based on business and marketing goals, audience, and phase-one focus of the story. The workgroup also participated in discussions regarding execution of the recommended initiatives through the work of contracted marketing and public relations agencies.



A. Business & Marketing Goals

Given that successful marketing efforts must work in support of defined business and marketing goals, the workgroup first agreed upon key decisions that will ultimately inform how the region's story is told:

1. Business Goals

The workgroup recognized MREP's primary and secondary business goals as the economic development agency serving the eight-county region.

- Primary: Facilitate growth among existing businesses in the region
- Secondary: Attract new and start-up companies to the region

2. Marketing Goals

The workgroup established marketing goals to support the business goals stated above.

- Increase awareness of our region's competitive advantage(s)
- Increase consideration of this region for business expansion, start-up, investment, etc.
- Unify eight-county region

B. Target Audience

The *Advance Now* Strategy identifies a need to tell the region's story to both an internal audience (within the region) and external audience (nation and world). The Marketing Workgroup discussed the importance of communicating to both audiences, and ultimately recommended an initial emphasis on the internal audience. Workgroup members felt it imperative to gain consensus and buy-in within the region first by ensuring that key internal stakeholders understand the assets and focus of the region's story. This approach will help unify the region and maintain consistency of message when going before an external audience.

1. Internal Audiences

The workgroup identified the following internal target audiences:

- Businesses and business leaders within the region
- Economic development partners
- Regional media outlets
- State and local elected officials

By focusing phase one of the effort on the internal audience, MREP and its partners will lay a solid foundation for the external messaging that will follow. Potential future external audiences will include national media outlets, industry-specific media outlets, related businesses outside of Wisconsin, and business influencers (i.e. site selection consultants) outside of Wisconsin.



C. Phase One Focus of Story

Given the established goals and target audiences, the Marketing Workgroup determined a phase-one focus that will tell a cohesive, well-defined story rooted in the region's competitive assets and positions of unassailable leadership. While the region has many strengths and potential stories to tell, the workgroup agreed that a well-defined focus will help position the region to become globally recognized around a message that all eight counties can claim, control, and communicate.

1. Focus

Using research from the *Advance Now* Strategy development process, as well as input from regional leaders, the workgroup determined a phase-one focus of the regional story based on these assets:

- Unparalleled industry strength in Agriculture, Advanced Manufacturing, and Life Sciences
- Innovations that reinforce the region's leadership in legacy industries and establish leadership in emerging industries, particularly as they stem from advancements in information technology
- Related support through research and development, skilled workforce, renowned education system, and high quality of life

The workgroup aligned around the convergence of the Agriculture, Advanced Manufacturing, and Life Sciences industries, acknowledging that the region's national leadership in these areas encompasses assets of each of the eight counties individually and the region as a whole. These industries make a notable overlap in the area of food, illustrating the region's leadership and excellence across a host of related stories, from food production and processing to research discoveries and business start-ups.

The region boasts significant innovation within these leading industries, pushing groundbreaking discoveries and advancements that affect the entire world. Much of this innovation is driven from the sophisticated and pioneering information technology that emerges from the entrepreneurs and businesses in the Madison Region. The level of concentration across all three industries maintains a built-in supply chain in terms of discovery, development, and distribution. There are multiple points of entry for workforce at all skills levels, augmented by a strong array of education and training programs available within the region. Pointing a marketing focus on the convergence of these industries also wraps in the initiatives of the other *Advance Now* workgroups, as there are clear connections to human capital, economic competitiveness, innovation and



entrepreneurship, and leadership and diversity. In addition, there is significant regional and state level support to advance these industries.

In defining this focus for phase-one efforts, the workgroup recognized that the most demonstrative stories will connect the dots among the region’s leading industries and among the initiatives of the other *Advance Now* workgroups.

Note: The MREP Board of Directors also recommended the exploration of a stronger marketing emphasis on the region’s emerging leadership in information technology.

V. OWNERSHIP & PARTNERS FOR IMPLEMENTATION

A. Brand Execution

Throughout the course of its meetings, the Marketing Workgroup provided input and feedback to Nelson Schmidt, the marketing agency retained by MREP to develop the brand, creative platform, and message platform for the eight-county region. Nelson Schmidt also developed the state’s *In Wisconsin* business climate brand for the Wisconsin Economic Development Corporation, and therefore was able to apply relevant research from the state’s branding process to the Madison Region.

Nelson Schmidt was tasked with aggregating input from the Marketing Workgroup, as well as input sought from the regional economic development professionals and top public- and private-sector leaders who participated in 1:1 discovery interviews, to build a brand platform for the eight-county region. The sum of this input, paired with *Advance Now* research, is communicated in a creative brief prepared by Nelson Schmidt (see Exhibit A).

From this creative brief, Nelson Schmidt prepared options for the eight-county region’s name and logo, as well as creative execution samples that will help the region’s story come to life and establish a foundation from which the entire region can speak. Nelson Schmidt’s creative deliverables align with the statewide *In Wisconsin* brand, further ensuring consistency of message across economic development partners at all levels.

The workgroup agreed that the region’s name should clearly communicate our geography; hence, including the word “Madison” is necessary as a widely recognized location. The group noted that the eight counties can be *located* around Madison, but do not need to be *defined* by



**Madison Region
Economic Partnership**

Madison. Instead, the region will be defined, and ultimately unified, through the focused telling of its story.

The final region name, organization name, and logo were determined based on feedback from MREP staff, the Marketing Workgroup, and the regional economic development professionals. The MREP Board approved these decisions at their May 15, 2013 meeting. See Exhibit B for the name and logo.



B. Implementation Agents & Roles

- 1.** MREP will be the lead implementation agent on the region's marketing efforts. However, success will rely on the input and collaboration of many partner entities. Potential supporting partners include regional economic development professionals, industry associations, higher education institutions, Wisconsin Economic Development Corporation, and related businesses. Marketing Workgroup members will play an ongoing role in the process by feeding a clearinghouse of related success stories on a rolling basis.
- 2.** MREP, in collaboration, with Nelson Schmidt will write a tactical marketing execution plan which will detail website re-design, media buys, and related collateral. The regional marketing plan will consider the *In Wisconsin* brand and marketing campaign, allowing the region to leverage broader funding resources and the collaborative messaging of the extended enterprise.
- 3.** The Luminis Group, a local public relations firm engaged by MREP to help execute a public relations campaign based on the workgroup's recommendations, will construct a detailed public relations plan rooted in the goals, audience, and focus identified by the Marketing Workgroup, with execution to begin in June 2013.
- 4.** The Marketing Workgroup may meet in the future to review and provide input on the tactical marketing/public relations execution campaigns developed by MREP and its contracted agencies. Vice President of Marketing Betsy Lundgren will continue to lead and coordinate these activities on behalf of MREP.

VI. RELEVANT METRICS

Specific marketing and communication goals will be attached to the marketing and public relations execution plans to be written. Potential metrics to track and report on include:

- 1.** Number and quality of media impressions
- 2.** Projected ROI on marketing investment
- 3.** Number of Madison Region success stories shared
- 4.** Number of national story placements (particularly among 'most wanted' media list)
- 5.** Ad equivalency rates
- 6.** Number of regional thought leaders quoted or profiled in national/international press



7. Quality of articles published about Madison Region
8. Annual hits on MREP website
9. External/regional audience subscriptions to MREP eNews
10. Subscribers/followers in MREP's social media networks
11. Annual inbound marketing events
12. Identifiable economic development projects fulfilled within region

VII. ESTIMATED COST

The estimated costs for implementing a marketing/public relations initiative on behalf of the Madison Region for Q3 and Q4 of 2013 are:

- \$51,250 personnel cost
- \$50,000 public relations and marketing agency contracts
- \$10,000 website updates
- \$20,000 design and printing of collateral
- \$15,000 media buys
- \$146,250 total

Note: *These costs may be offset by marketing grant dollars from Wisconsin Economic Development Corporation, to be determined by July 1, 2013.*

CREATIVE BRIEF – Thrive Brand Platform Development

| | | | | | | | | | |
|----------------------|----------------|-----|-----|-----|-----|-----|-----|-----|--|
| JOB NUMBER: 4037 | PROJECT TEAM: | | | | | | | | |
| CLIENT: THRIVE | AE: | CD: | AD: | CW: | PM: | MP: | ID: | DE: | |
| KICKOFF DATE: 4.2.13 | PROJECT HOURS: | | | | | | | | |
| DUE DATE: 5.23.13 | AE: | CD: | AD: | CW: | PM: | MP: | ID: | DE: | |

• **PROJECT DESCRIPTION:** (What are we creating?)

A brand and creative platform for the south central/Madison 8 county region’s business climate (see attached image).

We are not creating a brand/creative platform for Thrive the organization. However, if the brand for the business climate lends itself to become the brand for the entity, we will consider it during the creative process.

Deliverables:

- Brand Platform (Triangle completed; Brand identity needs to be done)
- Creative Platform including:
 - o 3 logo concepts
 - o 3 concepts portraying how the new identity would be introduced in print ads, collateral and website reskin

• **BACKGROUND:** (What is the context for the creative need and desired outcome?)

- o The need to brand and tell the story the 8-county region surrounding Madison was identified through an exhaustive marketing/business planning process called Advance Now. The conclusions of the report were comprehensive in outlining recommendations for what Thrive needs to do to “advance” the economic growth of the 8-county region, including “telling the story” of the region. In order to do so, the region needs a brand and creative platform.
- o Thrive has expressed interest in being a “model” for how the In Wisconsin brand would extend regionally. As we develop the brand for the 8-county region, we need to keep in mind how this model would be applied to the other regions.

• **OBJECTIVE:** (How will success be measured?)

- o **Business Goals**
 - **Primary:**
Facilitate growth among existing businesses in the region
 - **Secondary:**
Attract new and start-up companies to the region
- o **Marketing Goals**
 - Increase awareness of our region’s competitive advantage(s)
 - Increase consideration of this region for business expansion, start-up, investment, etc.
 - Unify eight-county region

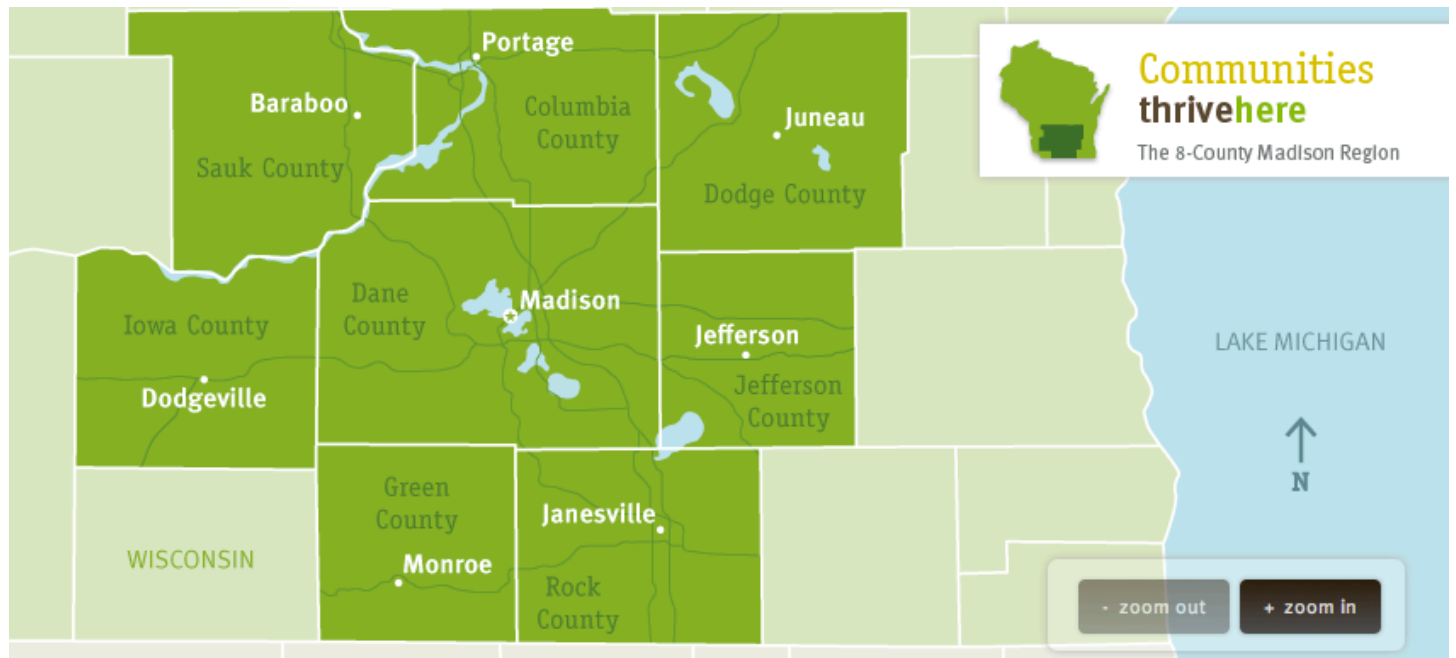
NOTE: Specific success metrics will be identified in the tactical marketing plan.

• **TARGET AUDIENCE:** (To whom are we talking? What are their specific needs? How do they feel?)

- o **External Audiences**
 - National media outlets
 - Industry-specific media outlets
 - Related businesses outside of Wisconsin
 - Business influencers (i.e. site selectors) outside of Wisconsin
- o **Internal Audiences**
 - Businesses within region
 - Regional media outlets
 - State and local elected officials
 - Economic development partners

- **SINGLE-MINDED IDEA:** (What is the one, vital thing we want to say?)
 - The 8-county region surrounding Madison has unique assets that deliver a positive climate for business growth, startup and relocation.
- **REASONS TO BELIEVE:** (What evidence can we use to support our claim?) See Triangle
 - Unparalleled industry strength, particularly in Agriculture, Advanced Manufacturing and Life Sciences
 - Innovation and discoveries that reinforce region's leadership in legacy industries (Ag and AM) and establish leadership in emerging industries (Life Sciences).
 - Skilled workforce
 - Renowned education system
 - Research and Development/UW-Madison
 - High quality of life/low business cost
- **HOW DO YOU WANT THEM TO FEEL?** (After they receive the message, how do we want them to feel about the product/brand?)
 - Desire to learn more about the possibilities of growing, starting or locating their business here
- **CREATIVE CONSIDERATIONS:** (What ideas have already been discussed or shared?)
 - Through the Advance Now Marketing Workgroup, there was alignment in exploring the "sweet spot" and shared attributes Agriculture, Advanced Manufacturing and Life Sciences. See Venn Diagram.
 - In particular, these three industries In Wisconsin have unassailable leadership nationally.
 - They rely on some form of "smart, science, research, advancements" to maintain that leadership. It's not just about being legacy leaders. It's about how innovation is pushing these industries to establish ground-breaking discoveries from 8-county region that affect the world.
 - The level of concentration across all three of a built-in supply chain (discovery, development, distribution) to a skilled workforce within the 8-county region is ownable.
 - In addition, there is regional and state level support to advance these industries.
 - The Workgroup identified key personality traits and brand attributes of the In Wisconsin brand triangle that are more distinct to the 8-county region. See Brand Triangle.
- **CREATIVE MANDATORIES:** (What is required to be included?)
 - Through identity (name, logo, etc.) make a connection to In Wisconsin
 - Important to have some form of geographic identifier – even if using Madison in brand as modifier, we've heard that we may need to go further to clearly identify geography of 8-county region within Wisconsin.
- **PRODUCTION CONSIDERATIONS/SPECS:** (What are the pre-defined production specs?)
 - We've determined the following marketing materials will be used, but do not have the specs:
 - Website
 - Print and online ads
 - Collateral
- **CONTENT REQUIREMENTS:** (What is the required content and summary of its use?) N/A
- **ADDITIONAL INFORMATION:**
 - See Attached and Basecamp (Advance Now Brochure)
 - <http://www.thrivehere.org> (see how the map of Madison area is treated on their homepage)
- **NEXT STEPS:**
 - 4.17 Creative Review with Thrive (Betsy and Paul)
 - 4.22 Creative Review with Workgroup
 - 5.8 or 5.16 Thrive Board Meeting Review

8-County Madison Region



HEADLINES PROVIDED BY THE ECONOMIC DEVELOPMENT PROFESSIONALS WHEN ASKED:

What would be the top headline or story to share from your municipality?

- Promega Corporation, a global biotech leader “In Wisconsin” selects Fitchburg for major expansion
- Brooklyn’s new business park opens – equidistant to southern Wisconsin markets and cities (Madison, Chicago, Milwaukee)
- \$100 million new economic development funds are made available for local businesses
- High tech company builds new facility in Madison East Washington corridor, will employ 100 people
- Credo Product Development, a startup company, constructs its new headquarters in McFarland {*would like to see business incubator for startups*}
- Dane County establishes Office of Economic & Workforce Development to partner with municipalities in business retention and expansion
- Ideas become realized – incubator, accelerators, research spending, and educational attainment of workforce {*examples: Virent, Third Wave, WARF, Gener*tor, WID*}
- Madison/Dane County is a center for the growth of electronic health records employment and talent
- Madison Region shines as local food leader
- BioAg/BioLink: where plants, science, and business collide {future headline if/when BioAg project is saved}
- Ribbon cutting in redeveloped downtown Deerfield makes village an exciting destination
- Madison Region wins national search for headquarters location
- Madison Region startup rate doubles over the last five years
- Collaboration in Capital Region results in increased growth in business expansions
- Grilled cheese championship draws thousands
- Madison Startup Weekend fuels entrepreneurship
- Sector67 expands to all Thrive counties
- Poultry processor plant opens in highland
- Three students win Madison Colleges’ first biz plan competition
- Family owned business located in village that pairs modern technology with hometown values
- Epic Systems in discussions with city on Campus 5
- From auto town to a new definition of advanced technology
- Promega’s \$110 million dollar GMP facilities opening in 2013
- Electronic Theatre Controls has 2/3 the world’s entertainment lighting market with 8 offices internationally including New York, Paris, Hong Kong, LA – with corporate HQ in Middleton employing 650
- Madison transforms its Capitol East District from its manufacturing past to a dynamic neighborhood within which to live and work
- Our community is growing again!

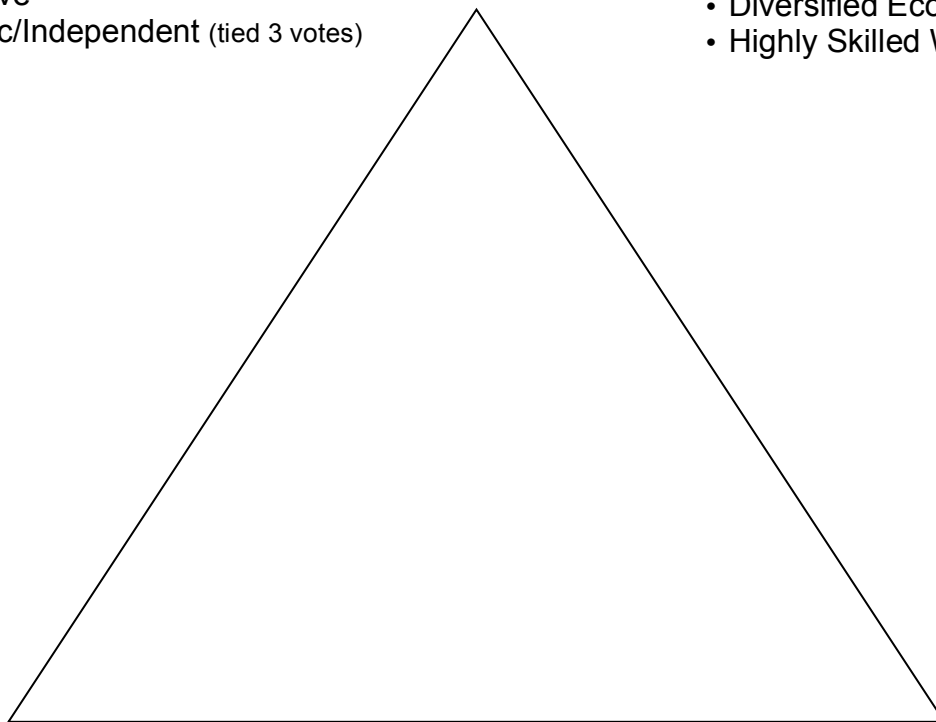
THRIVE REGION BRAND TRIANGLE

5-7 PERSONALITY TRAITS:

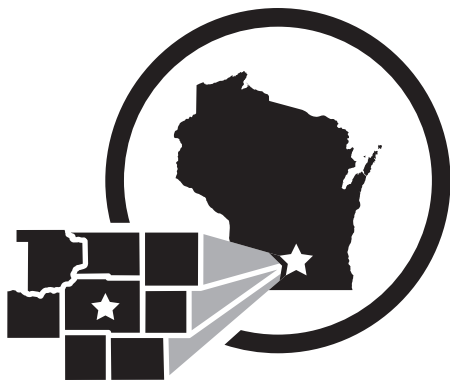
- **Innovative**
- **Pioneering**
- Original
- Productive
- Authentic/Independent (tied 3 votes)

5-7 BRAND ATTRIBUTES:

- **Research Capabilities**
- High Quality of Life
- Renowned Education System
- Diversified Economy
- Highly Skilled Workforce



CORE VALUE = Maximize Your Potential in the Thrive Region



**Madison Region
Economic Partnership**