

Episode 1 – Setting the Stage: The Gap That Kills Projects

Speaker Welcome to the inside straight. Those of you who play poker know that the inside straight is a hand where something's missing. But we're not here to talk about poker. We're here to talk about all things brand and communication, and what to do when something's missing and the strategy you've been dealt.

So who's around our table? Let's start with the introduction of myself. My name is Regina Lewis. I'm your host and my expertise is in brand transformation and public relations.

Carolyn, please introduce yourself. Hey everyone, I'm Carolyn Davenport Marcel, and my area of focus is strategic communications and diagnosis. My job is to help you figure out where the risks are and how to build your communications teams around them.

Hi, my name is Russell Holly. the managing director of a communications agency. Um, my speciality is actually in the NGO sector, developing strategies and implementation of those strategies.

Hi, I'm Mark from ACW and my speciality is really all around brand and digital integration.

And I am Diego. I'm all about audiovisual and I'm very happy to be in charge of the technical production of this podcast. And to add some of the audiovisual insights to this discussion. Over to you, Regina.

Sure. Thank you. Diego. So each episode, we take a case study or an issue that are common among branded communications professionals, and we ask three questions. The first is what's really going on here.

Secondly, what assumptions are being made. And lastly we wrap up with how do we mind that gap? What's missing? What are some of the solutions? And we'll close out with takeaways. So over to Carolyn to explain how the hands are dealt and what the cards are all about.

So hey, Regina, and as you guys know, we're talking about a poker hand. So in this case, what makes it really special?

You're only playing the hand you are dealt. But what do we mean by the different suits of cards? Well, you have all four. You have spades, which are represent leadership and power and decision making and governance. We have diamonds, which are resources and incentives, budget lines, staffing. Uh, we have hearts, which is around trust and human dynamics. It can be culture, fear, silence, credibility. We have clubs, which is around execution and craft. Uh, it's around um communications itself, um, um, digital builds etc. and then we have one extra wild card, which is the Joker. And that's all of those moments like shock and disruption. It's crisis and leadership change and funding shifts and things of that nature. And how when you introduce that into the deck, what does that mean for us?

Thank you so much, Carolyn. Um, so if you could give us an issue that you've encountered or you have colleagues who've encountered in one of your engagements that we can delve into using the cards now, what cards are you doing today?

Well, today's card is actually, um, hearts. So again, we're talking about trust in human dynamics. And we should just say really quickly, just simply say that every episode will set up that way, right? It'll have a card that's missing. And also in this episode, which is called Setting the Stage, we're talking about the gap that kills projects. And there's always one anchoring question, and that is in this case. How do you know if what you're asking for is actually what you need? So, uh. So I'm thinking about this in terms of telling a little story. And let's see if this is something that that resonates with everyone. And I think probably the best example I can give you is if we start with a comms brief, and I'm going to talk about it from my personal experience on both sides, I've been on both sides of the playing field. So I've been internally on the comms team and leading the comms team, and I've had my own agency and I've worked in agency. And the one thing that I know about this is, is the briefing internally is that brief usually comes from up high, down to communications. It is said in front of you and it comes from leadership. It comes from in some other department. And they say, go execute that. And that's all you have about that. So what it really means is, is that communications is not involved in any of this decision making at all. So what you're being fed is something people think they want, but it isn't necessarily what they need. And communications is oftentimes late in the game. So I'm bringing that to the table here. Is that your experience or have you experienced something different?

What's interesting is that are you sort of saying that the internal aspect is that it often bypasses communications, or the actual communications team isn't invited in at the early stages? So, so so who, who develops the, in, in that particular scenario, who developed the story, who developed the, the brief?

Well, I'm going to talk about this really specifically from a nonprofit's perspective. A lot of times it's not so much that they develop the brief outside of communications. The idea thinking comes from outside of communications and communications is oftentimes not at the table. So they come in very late. Right. And so and I wonder from your perspective,

that's interesting that that, that that whole sort of dynamic is that. So you're brought in often late, right? The external sort of communications specialist isn't brought in at all. Exactly. So there's that card missing straight away. That's right. And it can it can delve into that and say, well really, is this like, why? Why isn't the specialists involved in the creation that it's ultimately going to result in the right thing being produced at the end?

And that's because if I can jump in here, that's because if we use the analogy of baking a cake, most organisations, one of my favourite clients desserts. Yeah. Okay. Perfect. So since we're using analogies here, if we start with the analogy of, say, the cake, most organisations will look at communications and those analogous functions as the frosting. The thing that you put on last. They don't look at it as the leavening agents. The things that need to go into the cake to give it that rise. And I think that's where the disconnection happens. And that's. And once you have that disconnection, you're off to a bad start.

So you, you sort of almost saying that the, the communications layer of that cake is the very last layer that's put on rather than actually one of the, one of the base ingredients that goes into actually make the cake.

Bingo. I'm saying it even worse. It's the frosting. Frosting has nothing to do with the cake. There's no cake. The frosting has nothing to do with the case. The the frosting is purely decorative. I mean, yes, it gives an extra sugar boost, but it's primarily decorative. It's what you look at. It looks pretty and shiny on the outside, but it has nothing to do with the internal bits of the cake. Because if that cake is dry or if it's runny or overbaked. The whole cake is wrong. So it has. You have to look at the ingredients that go into the cake, not what goes on the cake.

And I would agree with that, because no one is ever going to say that this was a terrible cake. But the frosting was delicious. No one's ever going to say that. So it was just a bad cake

because it's interesting. I think a lot of a lot of the audience, you know, especially communications managers and directors, what I wonder if they see that sort of picture. I would imagine it's I don't know if it's a split one. Some of them say, no, no, no, no, it's a communications team that put the brief together from start to finish in my in my experience, the briefs that you get, I can't believe that they've actually been produced by the comms team directly. They might have had, as Carolyn was saying, a, a, a, an input. But where that input starts and ends is questionable. I got a scenario that a it only happened sort of two or three times in in my career that we were asked to create the brief on behalf of the organization, because we'd worked with them for a number of years and we we knew them, we knew the brand, we were trusted. And we, we, we knew what they wanted to, to deliver. But we did some research sessions. So we actually went through a process to actually then allow us to, to really give a very specific, targeted brief that wasn't ambiguous that, that, um, if it went out to tender, everybody would be, you know, uh, on the same page, everyone's singing from the same hymn sheet. Um, which again is different. You, you, you tend to get briefs and you just you one. What different companies would read different things into them. Um, and I don't know whether that's, that's the purpose of the brief, is to sort of interrogate the organizations and say, how would an organization answer that? And I can see the benefit on both sides. But for us, it's just it's so frustrating from the agency perspective, you get a brief and you're reading it and you're thinking, where did this come from? You could have torn it off the back of a off of a cornflakes packet. It doesn't make it doesn't make sort of commercial sense on delivering, uh, anything really. It's it's it's not detailed enough.

Well, I think there's one other card if I could throw in there that probably needs to go. And that's a spade. I would throw out a spade right now as a missing card too, because a lot of it just the spade stands for leadership. Right? Right. A lot of this has to do with leadership. A lot of this has to do with leadership. Looking at the situation saying, right, I have the solution for what our problems are. I have thought about this and it is this. And you take this information and put this in a brief comms team. And then we're going to create this.

And the problem that I've seen over the years, I've made it really hard, is there's very little understanding about what they're asking to be created and what it's for, why it exists or any of those things. It's just that I think I know and I know communications about as well as anybody else do. I talk, I write, so I communicate, and that's part of what's largely the problem. And then again, when you when you said, hey, this doesn't work. Like, what do you mean it doesn't work? And that's what you're, that's what you're left with. So I think that leadership plays a role in that, you know, and buffering how much of this that the communication even has a right to come in and actually change so that you can actually deliver something closer to what is intended.

Actually, one of, one of the things I've noticed that that in, in our experience from, from, again, from the agency perspective is having an agency that is multifaceted. It it can deal with internally most, if not all of of the communications needs of an organization. So rather than you have very fragmented briefs that come through on very specific elements, trust an agency to be able to do all of that material for you and therefore produce a brief where it's actually far more, um, generic. We need, we want a lot, a long term agreement with a, with an organization that will then turn around and be able to provide us with this information or these, these tools, rather than I need one, let's just send one out for a website. Let's send one out for, uh, some publications and, and, and the briefs are fragmented. Have you ever see any sort of benefit in something like that?

There's no benefit in it. Like never. And I mean, if I were to look at that and think of as in the fragmentation or the, the, the concentration, the concentration, you know, for me, if I were to look at a situation like that, ideally, we know you're you still have to start internally with the comms team, right? Even if you're working with it external, right. It's really important that they get it right from the beginning. They understand what's going to be delivered, and they're the ones that need to properly deliver that to you guys, you know, to the to the externals. And then what what is developed is a relationship between that comms team and partnership with the external in order to deliver exactly what you need. That fractionalization that comes in there is, is again, coming from other outside forces, from people who understand the least about communications. So I don't know, Mark, what

I would I would agree with that as well as I've been in, um, internal and external at an agency, and I've also owned an agency. And an example that I had as an agency owner was that I did receive a brief and from an organization and they spelled out what they wanted to do in a very specific market. It was it was event oriented. And the way that they had organized it, this city would never function that way. And so the question was, do I respond to the brief and the way that they've written it, which is going to be an epic fail, or do I tell them how it's done? And so we looked through the briefs, saw that there was a phone number, picked up the phone and called the client and said, hey, you know, you want to do this event in this certain city and this city functions this way. So we write how it should be done. And they said, yes, do that. So they did that. And then um. Did you. Sorry to interrupt, Regina. Did you have a relationship with that that that organization when you had the grief. Right. No. But they, they allowed you whatsoever, but they allowed you to talk to them because the the irony of today's world is that it's it's policed. That's the right word by procurement. And a lot of organizations won't allow you to have that, um, won't allow, have, have that sort of dialogue. You have to sort of submit the questions they get answered and it's all quite sterile.

Um, I should say that, um, this wasn't a long, long time ago, but it was in the US and it was a major organization and it was around a major event. And so they did put, they said, if any questions, email this, call that. And so, and I had never done that before, but it was the first time it was like, yeah, why not? because I had already basically written it how it should go. And here's the funny thing. Ended up winning the brief and had a very, very small budget. And then after we won the brief and was named as the Agency of Record, they cancelled the project. And then came back and I did a lot of work on the demographics resubmitted to them. They then went to another sponsor who then funded that event. And this engagement ended up paying like twenty times what the original one did because of that proactive work. Now, it doesn't always work that way because I've been internal and or internal at an agency and done, you know, done pitches that have gone sideways. And a lot of times I've seen a lot of discussion, especially on LinkedIn, where people are fearing that these organizations are just looking for free advice. They have no intention of hiring or doing the engagement that they're trying to procure, and they're just looking for different ways of putting together their own plan.

But I don't know if that's almost a separate conversation, isn't it, about the actual process? Because I think, yeah, everybody around the room's got a beef, uh, about process. Um, and we don't want it to descend into that type of, but it's, let's not go there. No, but let's, let's hear from Mark's experience. Mark, what's your experience been?

Yeah. I think that, uh, what are the warning signs as well? That is one of the key questions. And, you know, I think that if you're exposed to the team and you're getting different messages from individuals, one might say, I believe this and another person will believe something different. But the key thing really is there's no, there's, there's almost never any integration between, you know, what these individual actions are going to end up achieving. And I think that that's that for me, that's the red flag. It's well, as Russell said, I want a brochure or I want this or I want that. But that's irrelevant really. What, what what are you trying to achieve? And again, that goes back to leadership again. What what are the leadership telling you? What are they not telling you what they're going to achieve? And, you know, being in meetings fairly recently where it's, you know, we're trying to get a client to tell us what it actually is that they, that they need, what they need this particular vehicle to achieve or what the, what the audience is and, and how they want to integrate with that audience and what that message is to tell them. But all they can tell usually is I want this device and then that will achieve. Do you think they're actually looking though for, for, for what I would hope that they're looking for is an agency to turn around and say, I'll tell you what you need. I think that yes and no. And there it goes back to what we were talking about a little bit earlier, about people like specialists, they like consultants, and then they like to break processes down and have a different consultant for every single step of that process. And all you do is get fragmentation, excess cost, increased time frames. And again, a bit like we were talking earlier, you come, you're coming in too late to the game or you're getting some someone go, well, we want you to just brand on this, but we've already got someone to design a logo. So and that's often on a napkin that they did last night in the pub. Well, we had, we had a two weeks ago, I was like, well you've got three. That's a real example. That's real. That was yours. My real example is yeah, we had, oh, this is our new brand. We put a little mini brand guidelines together. These are the three primary brand colors. And one of them, well, they're all so different. And then we just found out, well, the MD likes these two colors. So that's that's why we've chosen that one. Yep. So hey, doesn't mean anything. Yeah. It doesn't mean. Just for reference, just like the color.

If the client actually starts watching this, this podcast and relates to him thinking that it's his, his sort of scenario, it's not it, it's just fictional. Um, I just wanted to make that clear. But the, the, the, but the interesting part in that is that I, why isn't the agency trusted enough to actually say, um, you just give us some base baselines and we will then we will then fill the gaps in and tell you what you need.

How about this one? Why isn't the internal communications team trusted enough to actually die in that discussion with the external team? Because they don't oftentimes trust us enough to do that. You know, it's, it's never gonna it can never work. It can never does. It never has to start with, you know, I, I always have to say they don't trust themselves. They don't trust themselves. And and it's extended. Exactly. Well, it's it's it's, that's the case then. It's it's it's about failure. They're, they're, they're, they're, they're, they're worried that yeah, they're going to, they're worried that whatever they do isn't going to work. Right. And if they start from that premise that whatever we do is probably not going to work. Mhm. Um, and then it filters all the way down. And then what happens is, is the lonely communications team, probably one or two people sat in the room suddenly feel the pressure. Uh, and, and, and whatever they do from that point on is never going to be as good as it could be.

And, you know, you know, the people I've always found the most inspiring are people who represent leadership, who allow themselves to be very vulnerable people that allow themselves to say, and I know what I know, and I know what I don't know, but that's, that's, isn't it. So it's an ego driver and some of this also. Right. Oh you've hit the nail. Yeah. Hopefully the words good driver in there. So there's no ego in this room. Nothing like that. But the real thing is, is that, you know, when you run into that rare leader who says, I know what I know, and here's what I need you to help me to understand. Then you get cooking. Yeah. And then you're able. Right. And when does that happen? And I have seen it happen. I have seen it happen, thankfully. And the real answer is, is that unicorn? Yeah. That unicorn. You know, business wants to talk about unicorns, but that unicorn, when that happens, magic happens. Yeah. You know, because then you get they come to you and they say, help me to understand this, which allows them to make a better decision about what it is they're trying to achieve. You know, again, your internal communications may not have all of the cards that you need on the table in order to get it over the finish line, right? For all kinds of reasons, you know,

resources, capacity, the skill set and things like that. But it can you can assess what you have. You just outsource some more and outsource the rest to the trust less, outsource them to the right team. You know, you're able to bring in the right external team to fill in the parts you don't have, right? You use the, the earlier on.

Yeah, this is a good point to, to move on to the, to the next question, which is about assumptions being made. And before we go into that, I'd like to, um, throw in an analogy and then see how you respond to this. So this is taken from a poker expert who was commenting on why people lose at poker. And I think there's some, some lessons that we can draw here for brand and communications. And so number five is bad luck. Everybody has bad luck things. You do everything right and nothing goes right. But if you continue to lose, there's something else wrong. If you continue to lose beyond a few implementations. The second one, number four, is being too predictable. Your competitors and everybody else have caught up to you or you didn't evolve your messaging along with where you are in your maturation process. Thirdly, is playing a game that's too tough. You're fighting above your weight. You're taking on things that you're not ready to handle. Number two is the fundamentals. And as communicators, I'm sure you can relate to that. There's no basics in place. They're ignoring the rules of engagement, trying to do things out of sequence and so forth, not integrating their programs. The first one is what they call tilt in poker, which is when you get to that place of mental frustration or confusion, and you adapt a strategy that's suboptimal or way too aggressive. Now my experts. Are there any analogies that you can draw from your experiences?

I don't know if I can draw analogies, but I can tell you for certain, I know about the two that you mentioned, missing the fundamentals and also punching above your weight. For me, oftentimes those two go hand in hand. Know your strengths. Yeah. Know your strengths. You know, because and where you are in your development and your know your weaknesses and know where you are in the development stage of what you're trying to achieve. And oftentimes you're punching above before you have actually mastered the fundamentals and you don't let the people around you actually master those fundamentals or actually implement those basic fundamentals. So I, I, I don't know about an example, but that's what I've experienced the most.

I, I would agree in that in terms of the, the mastering the fundamentals, but you can you can actually sort of look at that and, um, almost say the fundamentals are getting those. And I'm going to go back to the cake analogy, uh, ingredients you just have to put, if you want that cake to taste good, you just put better ingredients into it. And those, those, you know, the better ingredients, higher quality are basically better advice. Allow that advice to come in, plan it better. So it's really about getting the fundamentals of, uh, any type of strategy or awareness campaign, you know, really ironed out before you go through it. And that's understanding all of the elements, your audience, understanding what the organization wants. And we, you know, there's a lot of it's not repetition, but there's a lot of topics that we're going to talk about that will repeat themselves because they're just those fundamentals that we see never getting addressed. And again, I think it's it's not because a lot of the teams don't want to do it. It's because they don't feel, um, backed up. They don't feel that that's what the organization actually wants. And are they being set up to fail?

Yeah. And that I mean, that is a separate episode. Yeah, yeah, yeah.

It's the scapegoating. Um, Mark, what are your thoughts on that topic? I think, I think for me, I see it a lot and it's predictability. It's people doing the same either that they've already done or copying other people. Uh, and again, that may align with their skill set. It may align with their belief that they don't want to step out of lane to be caught out to, or why you're doing something different that doesn't align with what I'm doing, or you're treading on my toes. But I think that. Why would again, goes back to branding and developing brands, developing communication materials for people. We always say to people, and we've had people come to us and say, we like that website, can you just copy it for us? Yeah. I said, well, no, we don't do it. So we don't do that. Yeah, I think we do is unique. And the reason it's unique is because the organizations we do it for are unique. We're unique. Yeah. It's unique. Yeah. Why would you do that? And I mean really, I think I'd have all of the designers get up and and they'd resign actually, if I asked them to do, you know, oh, another website the same as last time, please. Thank you very much.

So where where do we take it from here, Regina. Yeah. Yeah. Well communicators need need a a win. And I think that's something that's not taking into account. But to wrap up on the point, um, one of the things that I, I agree with all of you on the, the fundamentals, the way that I was trained to look at strategy and planning is to

measure everything on a bell curve and you need to know where you are on that. Are you ramping up? Are you in the middle or on your way down? And your plan needs to match up to that. Because if you are on the verge of dipping down, you need a completely different set of strategies than if you're ramping up. And you need a different kind of timeline. And I think those things are not taken into account what's really going on in the real world. And so since we're talking about assumptions right now, I think that you brought up some good points. A lot of times, leadership or clients assume that everything is how it's always been static. It's not moving. It's not constantly changing. There are not new dynamics. And I think that one of the reasons why you do need to trust your comms people is because they have an ear to the outside. You're just talking amongst yourselves. A lot of times when you're in an organization but you need an ear to the outside. What are the media saying? What's what are the dialogues going on social. What's happening in the political arena? What's going on in the business? What are the capital markets doing? What are they responding to? Because all of those things need to be taken into account. We don't live in isolation. We live in a constantly changing.

Can I add something to that, Regina? I've got something. So the one of the things is that, um, have an agency that has multi sectors that doesn't just specialize in that particular particular field. I think a lot of organizations fear that we need someone that is an expert in, uh, maybe say humanitarian or, or, um, uh, uh, you know, how to deal with safe ammunition or, uh, world security. And I think then that, and it's, I'm not, you know, putting everybody into that same, same pot. But one of the benefits of having an agency that has multi-sector is that it learns, it adapts from different trends, not just, you know, for profit and not for profit. And, you know, someone who travels, someone who's who, who, who looks at different cultures is going to be richer for it. And that same, that same same sort of process, I believe is key to, to sort of an agency that can really differentiate itself, differentiate itself and be a much more beneficial to an organization.

Bringing it back in really quickly on an internal side of communications, it's the same thing when you're scaling up and building out a team that brings, you know, experiences across many different industries and functions, and you're bringing them in. That is where you start to do really interesting things because sometimes people are coming in and they this may be the first time that they've actually worked in, say, a nonprofit space. They've had a ton of experience working in the a corporate and, you know, for profit area. And they have and they have tried different things. And those transferable skills from there goes right into there, and they transform the space that they're actually in, and vice versa. People can come out of that. People think, you know, you go over the nonprofit, it's all over your life and corporates over it isn't because actually you learn from that and there are transferable skills and goals the other way. It's got a really good case study about that, but that'll be another podcast, believe me.

Okay. Yeah. But it comes back to the card of trust. Yes. Yeah. Because you really do need to have that trust in your strategy and who you are as an organization. Because most people believe if you've never sold, you know, a bar of soap, you cannot possibly sell a bar of soap if you've only sold hairbrushes. And the fact is, if you if you understand communications, communications is communications. Business is a business. If you understand the fundamentals, the product, the sector does not matter. Because those are things you can learn, right?

So how do we, how do we, uh, how do we wrap this one up in Regina?

Time to land this plane. So what are some of the takeaways that we can come up with for, for minding that gap, filling that trust gap? When you go to either hire internally or you're hiring an agency, when you're looking at a tender, how do you write that relationship? Because there seems to be a chasm between what clients think, what leadership thinks, and what the internal in-house people understand and what the external agencies understand. There's a chasm between these two. How do we find that gap?

Sometimes I think the chasm is actually, uh, and forgive me, the, the, the individual consultants out there. I think sometimes the chasm is actually between a consultant that comes in and writes a brief to the realities of how agencies work and how they translate that brief. Um, because again, that brief by an individual is in almost total isolation. And I don't, I, I often see these, the, the, these tenders come through and you think, well, how does that tie into the rest of the communication strategy? Yes, it might be a new website, but it doesn't it's not relatable. So I think for me, it's making sure that, you know, again, do you bring agencies in much, much sooner in the process? Get get an agency on board before you write the brief. They then write the brief and, and, and carry on and implement it. So it's almost like the, the process isn't isn't sort of streamlined enough.

Well, I go one step further. The first question you should be asking yourself in the leadership hat is have I brought in my internal comms first? Are they there? Are they there actually, and are they helping? And that's not to say it's just the leadership and and comms. It means that of all of the different departments that have a stake in what's being delivered, has everyone made sure that comms has weighed in and has part has taken a part in shaping what comes out of that. But that comes down to trusting. Yeah. And that's trust, trust, communication. That means if I had one takeaway to give one takeaway, just you need to keep as a comms person, you need to keep reminding leadership what it is that you know how to do and why you uniquely know how to do that, as opposed to other people in the organisation who think they understand comms, you know, and that's the real point. They need to do that. That's the part that they've got to do. Leadership needs to bring them in earlier so that it allows for your team to come in earlier.

So, Mark, what do you reckon? Yeah, I think it's a okay being open, being honest, asking for help, asking for advice, sharing knowledge sharing,

and wrapping it up with you. Regina. What's your takeaway?

Yeah, I think you bring up a lot of really good points. Now, if you're putting out a tender for an agency that your internal team is going to ultimately have to manage because you cannot manage com by committee, it's just leading to disaster. You really need somebody in charge. And if your comms people are not being brought in early, they're not sat around the table. You have to ask why not? And that goes back to the spade card, which is leadership, because that's a question of leadership. Because if you don't have the people around the table that you trust, then that goes back to you. Did you hire those people because you could save time and money? Did you inherit those people? Have you examined what they can do? Because I could probably do a whole lot more than you give them credit for doing. And if you're ignoring them, why are you ignoring them?

Yeah. Right. Well, so I think it comes back to yeah, asking taking a hard look at yourself and saying, what's going on here? And what do I need to do? Which is the first question at the end. Well, that's been a, you know, a really dynamic session. So listen, listeners, thanks for listening in to the inside straight. You know, we don't promise perfect, perfect outcomes. You know, we just, we, it promises better ones. Subscribe to the inside straight. Send us your stories for analysis. Follow us on social channels for clips, reflections, and conversations beyond the episode.