

Artistic Toy Sales Playbook

How to Sell Character Marketing



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Introduction

Thank you for making Character Marketing a part of your business plan. This Playbook is intended to provide you a basis to succeed in the world of building award winning campaigns for your clients using Characters and primarily stuffed plush toys; however, character marketing goes beyond the stuffed plush toys into other areas of branding, incentives, education, and business development programs. You will soon find that it doesn't matter if your client is in a serious business or fun business you can find ways to use characters as powerful marketing tools that can be used in any and all industries.

Character Marketing can also be thought of as a philosophy:

***“Sow a thought and you reap an action;
Sow an act and you reap a habit;
Sow a habit and you reap a character;
Sow a character and you reap a destiny.”***

~ Ralph Waldo Emerson (1803 - 1882) US philosopher, poet, essayist

On these pages are only words, it will be you that makes Character sales happen. These are detail instructions that have worked for others. Some think this Playbook might be filled with trade secrets, but hard work is no secret to those who have achieved success using these principals. If these instructions work for you, don't hold back on sharing them with others. The opposite is also true, what works for me, may not work for you, but finding what works best for each of us is the most important. Please call me to discuss any questions you have.

Sincerely,

Jim Socci, President
Artistic Toy.
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The Strategy of “Character Marketing”

Character branding is nothing new. For thousands of years, mankind has been branding its most deeply held beliefs with characters in the forms of their gods, idols and archetypes. All of these things were personified in the form of characters to make them understandable and to reach the greatest number of people. Personifying these things not only puts a face to it, but unlike a logo, it also brings it to life, enabling us to have a relationship with it. That’s the benefit of communicating to an audience with character branding. These days you need to go beyond advertising; you have to create a relationship with your audience. A logo can’t do it. If a picture is worth a thousand words, the true character for your brand is worth millions.

Any established company can use characters to expand awareness into new audiences, create better and more direct communication with existing customers, and bring to life aspects of their business that their audiences are not yet aware of. A new company that is just establishing itself can most precisely communicate who they are, what they do, and how they do it through the qualities and actions of a character. And remember: Characters can be real people, illustrations or animation. It’s important to know that when we talk of characters for branding, we are not simply speaking of cartoon characters. The medium used to convey a character is best determined by the character itself, and can range from animation to fine art, encompassing the full spectrum of art styles, as well as photography.

Characters aren’t just for kids or cereal any more. They can be for any audience, business or brand. They can come from any company that puts core beliefs behind the character with the purpose of projecting those beliefs to customers. The Aflac duck and the GEICO gecko are great examples. They brought their respective insurance companies to life from relative obscurity. Bottom line, any business or brand can benefit from the proper character being developed for them

I believe every business and every brand has a wonderful hidden equity in the nature and character of that business or brand—tap into it. It’s a precious treasure created by the passion and beliefs of the people that make those businesses and brands what they are.

When PepsiCo wanted to differentiate its Mug root beer from competing products, it called David Altschul, the co-founder of a small marketing firm called Character in Portland, Oregon, who helped create a mysterious bulldog to spice up Mug’s soda cans. When General Mills decided to reinvigorate Buzz, the Honey Nut Cheerios bee, Character was hired to give him a makeover. And when Pepperidge Farm committed to sprucing up its Cheddar goldfish icon, the brand experts at Character named him Finn, shifted his sunglasses to the top of his head, and moved him into a colorful community. His school, as seen on TV ads launched in January, now includes Gilbert, a shy pretzel goldfish; Brooke, a smart Parmesan fish; and a daredevil XTreme, from the Flavor Blasted line of Goldfish.

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Creating a character is “not about making stuff up, but discovering the story inherent in the brand.

According to our client’s successes, effective brand characters can't simply mirror the consumer. This cardinal sin is what caused the downfall of the hip-hop Colonel Sanders, who was designed to engage KFC'S “street” clientele, and the modernized Betty Crocker who was a digital hybrid of multiple women who represent the brand's target audience. People connect emotionally with characters whose struggles are familiar to them, not with characters who superficially look or act like them. A look at long-reigning beloved characters proves his point: Tony the Tiger has an oversized ego, the Maytag repairman is a lonely perfectionist, and Sonny from Cocoa Puffs teeters on the brink of insanity.

A brand character or icon can be properly developed to deliver emotional connection. Here’s how:

- 1) Know the character’s story.
- 2) Know its flaws, vulnerabilities, and sources of conflict (preferably self-inflicted).
- 3) Connect the character to the brand in a deep, intrinsic way.
- 4) Know what human truth is revealed throughout the story that audiences can relate to.
- 5) Know whom the Icon represents and have that representation be one of entertainment triumphs and failures.

What is the story about? There must be a background story to all character. The Disney/Kellogg's alliance has foundered, largely because no one really knows what Mickey's story is.

On the other hand, GEICO’s website explains the origin of the gecko. Because the name 'GEICO' was often mispronounced, 'GEICO' became 'gecko,' and a quick doodle of a gecko appeared. The agency knew how powerful animals are in the world of advertising, and a full illustration followed. The English voice that the gecko uses became another distinguishing factor. Even when the gecko becomes annoyed with people calling him at home on the phone by mistake when they are trying to reach GEICO, he always maintains his decorum in a very proper English tone.

GEICO has a great story for the gecko. Namely, he is an average English man mistaken during phone calls for an insurance company. Eventually, the company hires him and now he represents an employee of GEICO (a person just like you and me) who is looking out for the average guy not wanting to pay “too much” money for car insurance.

Who should a character or icon represent? As previously stated, the character or icon must be emotionally related to its audience. Therefore, It should not be an ambassador for the brand. It needs to have flaws, hopefully some inner conflict, and most of all, a way to elicit the emotional need for the product.

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Would a Character/Mascot Help Your Business?

Before you say yes, consider a few guidelines from the experts.

1. The most important step in creating a character for your brand is understanding the brand itself: What are you really selling? McDonald's sells food, but also fun. It uses minor characters, such as Mayor McCheese, that look like food, but its best-known mascot is a clown.
2. Characters generally work best for consumer products, not services. If your company doesn't try to attract buyers through creative packaging, a character might not give you a big marketing boost.
3. Don't envision the character as an ambassador for your brand. Ambassadors have to be perfect, which generally makes them boring and unbelievable. Conflict and flaws make characters interesting and engaging, such as the competing personalities among M&Ms.
4. Don't worry about making your character look like your typical customer. KFC's hip-hop version of Colonel Sanders was a bust because marketers were concerned more about how he looked and less about how he embodied the company's brand.

Marketing Value

Most consumers grew up with product-related characters and associate them with the brands they represent. Mascot and character marketing experienced a brief period of decline in the 1980s, as ad executives and brand managers sought other creative and outlandish means of promoting their brands. But today the mascot is back—and not just on cereal shelves.

A few examples:

- According to Aflac Inc., the duck has done more for the life and disability insurer's brand recognition in less than five years than most advertising symbols have done for their brand over decades. Launched in January 2000, the national advertising campaign featuring the duck quacking, "AFLAAAAC," produced a significant increase in Aflac's name recognition—from 12% to more than 90%, according to Aflac.
- Sports teams have shown the marketing world that mascots and characters are highly effective in creating awareness, building loyalty and most importantly, selling tickets. And the rest of the marketing world is taking note. The San Diego Chicken made the sports mascot big news. Other sports teams have followed suit.

Most small businesses have never considered the value of a character or mascot in their marketing effort. But this form of marketing can be affordable and, if applied in the correct fashion, highly effective.

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The benefits are numerous to marketers that are serious about establishing personality for their brands. A strong character/mascot marketing effort will:

- Create media exposure and excitement
- Generate goodwill for the brand
- Provide a voice for the company's social conscience
- Create a rallying icon for community identification (for example, baseball fans doing the tomahawk chop)
- Provide tie-in identification at point-of-sale (the mascot boldly featured on packaging, in-store merchandising, trucks and t-shirts), and sell products

The appeal is normally broad—from children, to parents, to media.

Does a mascot or character make sense for the average small business?

With the understanding that not every character has to be translated to three-dimensional form, characters can exist equally well on the printed page or on product packaging. And the character can work particularly well for a product that needs to generate an emotional response in the consumer. Characters and mascots also make sense in retail, particularly where children are the primary target, followed closely by parents who have to pay the bill.

If client is seriously considering the development of a character or mascot, follow this advice:

- Spend whatever it takes, within reason, to develop a professional character that is worthy of your product. Don't let your character look amateurish and/or cheaply produced.
- Remember that your character needs to deliver more than just entertainment. There must be strong identification with the brand.
- Once you've developed the character, use it everywhere: from signage to collateral, to in-store merchandising, to packaging, advertising and events.
- Use the services of Artistic Toy to guide you through the important development phase. Character development, particularly for mascots, requires a special base of knowledge for things to execute successfully. Most toy manufactures and design firms don't have the complete skills set.

Current Research

"The latest consumer research shows clearly where the new opportunity in the plush business is, and that is gifts," says Pam Danziger, president of Unity Marketing and author of the book *Why People Buy Things They Don't Need* (Ithaca, NY: Paramount Market Publishing, 2002). "Nearly 80% of consumers buy plush to give as a gift. Retailers and manufacturers should be targeting the plush gift market as the best way to overcome the current stagnation in plush sales."

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One plush company that has fully embraced the shift into the gift market is The Vermont Teddy Bear Company (NASDAQ:BEAR), which offers its Bear-Gram gift teddy bears, along with a wide range of USA-made gift items, through its SendAmerica catalog.

A telephone survey of 1,000 U.S. households found that about one-fifth of them had purchased a plush, stuffed or beanbag toy in the past year. Households under 45 years of age are the prime market for plush, while households with children present are twice as likely to buy plush as single person or two-person homes. Demographically, women are more likely to buy plush than men. However, when men shop for plush, they are searching out gift items and tend to spend more than the typical \$11 to \$22 price tag.

Benefits of Characters/Mascots

Superior customer support, product quality, and other differentiators of your business will stick in the minds of customers only so long. You've got to remind people often that you are there, alive and well, and waiting for the next business transaction. One of the most cost-effective and impactful ways to do this is to create a memorable character/mascot to represent your company—featured prominently in television ads, print ads, promotions and events. An effective character carries the unique property of “stickiness”: It tends to stick in the minds of your customers longer than a product or company name. This, of course, can be either good or bad. It's good if you take the appropriate steps to develop a strong, brand-reinforcing character/mascot that customers can relate to and take ownership of; it's bad if the character is perceived as a copycat, poor quality, or cheap.

Your character/mascot will be indelibly associated with your team or company, so choose it with care. A bull mascot is a positive symbol for a stock company, for instance; but if the same company used a red ostrich mascot, the message would be something totally different. You will need to do a lot of brainstorming and research upfront, to determine which animal or character fits your company's long-term branding strategy.

The tough part is the initial concept creation. There are professionals that can help you with this, so be sure to choose a partner with experience.

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Case Study Review

The following case studies are found in your Customer PowerPoint presentation. These details will help you better explain the case studies to your customer.

- a. Consumer POS
 - Schnapps Objective: Gain end aisle displays in key accounts.
 - Plan: Plush bear mail-in offer. Bear was featured on display as dealer loader (gift to store manager for authorizing off-shelf display).
 - Result: 100% of all displays were placed and sales exceeded all expectations.
 - Budget \$50,000 plus

- b. Consumer Gift with Purchase
 - Fiddle Faddle and Zonk Objective: Gain end aisle displays in key accounts. Client knew sales would increase an average 300% with off-shelf display.
 - Plan: Plush toy mail-in offer. Toys were featured on displays as dealer loaders (gift to store manager for authorizing off-shelf display). Consumer could get either animal for a reasonable price plus proof-of-purchase.
 - Result: 100% of all displays were placed and sales exceeded all expectations
 - Budget \$500,000 plus

- c. Consumer Collectable
 - Donuts the Bear Objective: Increase sales of donut products during holiday season when sales were slow due to other treat options.
 - Plan: Plush bear mail-in offer with cause-related overlay (donation was made to charity with each redemption).
 - Result: 100% of all bears were sold and product sales were up during holiday season.
 - Budget: \$100,000 plus

- d. Brand Character
 - AFLAC
 - Listen to their story by clicking on the links below
 - AFLAC <http://www.artistictoysmfg.com/marketingvids.html>

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- e. Trade Show Traffic Builder
 - Objective: Increase awareness of company's products and services at trade show.
 - Plan: Hand out 9" teddy bear with imprinted t-shirt and hangtag. Each tag has unique number redeemable for a NO RISK offer (i.e. FREE sample pack).
 - Result: 132 prizes awarded in 6 hours, 30 new registrants on website in one week, which boosted website hits 20% and visits 140% same week. One order placed in 30 days and a second order in 60 days. Orders were placed by new customers.
 - Budget: \$19,000 in 60 days

- f. Door Opener Direct Mail
 - Objective: Set appointment with president of \$300 Million computer company who was interested in adding a bee character to his marketing plan.
 - Plan: Sent package that contained five small magnetic bees along with a postcard stating, "I know you are a Busy Bee," requesting appointment.
 - Result: Upon obtaining appointment, showed up with a 36" plush bee. President of the company ran in and out of his executives' offices, showing off the plush bee. In addition, the five magnetic bees were hanging on refrigerator in the Executive Lounge.
 - Budget: Secured custom bee design work and character marketing consulting agreement to assist them in developing the applications and uses for \$40,000 initial order.

- g. Hotel Trade Show
 - Objective: Engage prospects in conversations about the fun and exciting environment at the hotel/resort.
 - Plan: "Toss Your Cookies" theme. Gave out soft plush gingerbread man toys with imprinted ribbon to all booth visitors. Visitor was challenged to toss the "cookie" through the hole to see if they won a free night's stay.
 - Result: Several free night's stays were awarded; 1,000 registration cards were completed capturing customer information; and all booth visitors left with a sense of the refreshing atmosphere at the resort. This was the third year that a concept involving plush toys was used successfully in the trade show environment.
 - Billings: \$15,000

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- h. Health Care Insurance
 - Objective: Introduce health care insurance company as they open offices in new communities.
 - Plan: Hand out 5" plush bears and puppy dogs, imprinted with insurance company name, at community health fairs to reinforce company's commitment to members.
 - Result: The Company increased its membership by 1.5 million from 2004 to 2006.
 - Billings: \$300,000

- i. Trip or Meeting Promotion
 - Objective: Keep the sales team focused on achieving personal sales target while at the same time reminding them about annual trip prize.
 - Plan: At designated times during the year, the company sent a 6" Couqi Frog, 8" Hula Bear, and 8" Hawaiian Bear giving salespeople an account of where they stood toward achieving their goals and reminding them about the award trip to Hawaii in the winter.
 - Result: 10% more of the sales team earned the annual trip that year versus years past.
 - Billings: \$25,000

- j. Military
 - Objective: Introduce a new product into the military base stores.
 - Plan: Sell 12" plush bear with full logo PT gear along with plastic dog tag.
 - Result: 20,000 of the Army Bears sold out in three months. Bears were also used to sell more t-shirts as a package deal (bear held a rolled-up t-shirt).
 - Budget: \$185,000

- k. Product Packaging
 - Objective: Needed a way to distribute product samples directly to product user.
 - Plan: Pet pharmaceutical company inserts medicine sample inside a 3" plush toy. Pet plays with toy to open Velcro bottom and accept medicine.
 - Result: More than 4,000 units are flying off the shelf per month.
 - Budget: \$80,000

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i. Government

- Objective: Provide childcare instruction to new parents.
- Plan: The state of California has an organization that works to provide early childhood education training to parents (covering first five years of life). The state has about 500,000 newborn babies each year. Parents of newborns receive a packet of educational information with resource listings. A lamb and frog puppet toy are included in the packet.
- Result: The puppets are used as educational tools for bridging language barriers among educators, parents, and children. They're also used by parents during story time, bath time, and for general education (ongoing program, four years).
- Budget: \$1,000,0000

m. Safety

- Objective: Sell more fire safety prevention merchandise
- Plan: The customer is a catalog distributor of all types of fire awareness products, including pins, shirts, hats, mugs. They regularly warehouse thousands of stock plush bears, dogs, and fire trucks and then resell them from the catalog and online. Out of all the promotional products available, they have chosen to promote themselves with a plush toy because they know the item has a long shelf life and makes a nice customer thank you.
- Result: New and loyal customers continue to purchase product and 15,000 plush Dalmatians are sent out every year as gifts with purchase.
- Budget: \$100,000

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Company Selection

To be successful at selling Character Marketing projects of \$25,000 or more, you have to be calling on the right size companies. Your target should be companies with \$25 million in sales or higher. You will see from the chart below that as a general rule, a company will budget 1% for Advertising, Collateral, PR, Trade Show, and Promotion. Promotion represents about 20% of that spending, or \$50,000 for businesses of \$25 million in revenues. Remember, this \$50,000 covers all promotion projects, and rarely does anyone get 100% of the business.

Revenue	Ad/Collateral/Promotion/ PR/Trade Show Total Est. Spending	Promotion Spending Potential
\$1 Billion +	\$20,000,000	\$4,000,000
\$500 Million	\$10,000,000	\$2,000,000
\$100 Million	\$2,000,000	\$400,000
\$50 Million	\$1,000,000	\$200,000
\$25 Million	\$250,000	\$50,000
\$10 Million or less	\$5,000-\$20,000	\$1,000-\$4,000

You also must select the right industries for selling Character Marketing. Best prospects include:

- Consumer Packaged Goods Companies (food and/or kid oriented products)
- Restaurants (sit down or fast food)
- Retailers/Department Stores
- Consumer Services Companies: Insurance, Tires, Security Systems, Banks, Credit Unions, Hospitals
- Police and Fire Departments
- Trade Show Exhibitors
- Any business-to-business company that wants to promote a product, increase attendance at trade shows, help salespeople get appointments, or motivate employee performance

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One-Page Business Plan

Next, you need to create a one-page business plan to help you identify where you can sell Character Marketing. The template below takes only about 30 minutes to complete and will help you target \$100,000 – \$500,000 or more in new sales. It identifies six keys business applications, with one open column for “other” applications:

- **Mascot Marketing:** Generally sports teams, but some businesses and organizations have adopted mascots. A good example is Goldy the Gopher for the University of Minnesota.
- **Trade Show:** Characters can be given out when you come by the booth and register.
- **Business-to-Business Direct Mail;** Characters can be used as a promotional item in a mailer to gain attention and readership or as a gift for meeting with a sales rep.
- **Collectable:** The holiday season is a great time to offer a Santa Bear (or other character) with purchase. Each year you change the look so it becomes a collectable.
- **POS Display:** Many companies will attach a character to their point of sale display to draw the attention of consumers. Toy also acts as a dealer loader to motivate off-shelf displays (e.g., store manager gets to keep the toy when the display is taken down).
- **Gift with Purchase:** Examples: If you buy \$100 of our product you can get a bear free; or mail in 3 proofs of purchase with \$8.95 for plush lion.
- **Other:** Plush characters can be used for new product launches; to reinforce product packaging; to promote wellness and/or safety in the workplace; as a school/organizational fundraiser; for newborns at health systems; as a free gift with qualifying deposit or new account/loan application at financial institutions; for resale at zoo gift stores; to promote pet stores, veterinarian clinics/animal hospitals; plus many more applications.

To get going, first make a list of 20-30 of your top prospects and list them in the template below. Then take time to think about how Character Marketing might be used by each company. The General Mills Cereal example shows applications for trade shows, collectable, POS and gift with purchase. The University of Minnesota Goldy Gopher example shows Character Marketing could be used for mascot character, collectable, POS and gift with purchase.

Prospects	Mascot Character	Trade Show	Business-to-Business Direct mail	Collectable	POS	Gift with Purchase	Other
General Mills Cereals		Yes		Yes	Yes	Yes	
U of M Goldy Gopher	Yes			Yes	Yes	Yes	

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Prospecting Best Practices

For many, prospecting is a dreaded chore. But you can't succeed at sales without effective, persistent prospecting. When prospecting, you need to realize that you are competing with at least 50 other salespeople to get a meeting with a buyer who will see 1-4 new salespeople a year. To stand out, you must be creative and aggressive.

To help you, we are offering a "Plush Character Prospecting Campaign To Go," which is available to help you win target accounts. It includes a direct mail component to gain attention and open the door for your personal contact, with phone follow-up to gain an appointment.

The mailing includes: a prospecting letter as shown below; a plush animal; a newsletter on character marketing; a mailing box; and a theme label for the outside of the box. All you have to do is let us know the quantity you need, and we will ship you the materials. Then you can make your prospecting mailings according to your own schedule.

The titles you need to target with your mailing are: VP Advertising, VP Marketing, President or CEO.

The best way to get these names is to call the company receptionist and ask for the name of the person who holds each title. Then ask for the direct phone number and e-mail address for each. Some receptionists will give you a lot of information; others will not. But you'll never get more than you ask for!

One last piece of advice: Prospect to only one or two target accounts a week, to allow for proper follow-up using the phone script provided below. You should expect to make at least seven phone calls before you get the buyer on the phone.

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Sample of Character Marketing Prospecting Letter

[Client Name]
[Company]
[Address]
[City, State/Province, Zip/Postal Code]

ADD CHARACTER TO YOUR MARKETING!

Dear [Client First Name]:

The M&M Talking Candies...Charlie the Tuna...the Michelin Man. Who isn't aware of famous advertising icons like these? They're ingrained in consumer consciousness, delivering enormous brand awareness, identity and product pull-through.

THE IMPORTANCE OF GETTING NOTICED:

The average person is exposed to **more than 3,000 ads per day**. And it's getting harder to gain attention! Each week, the average U.S. consumer*:

- Listens to 20 hours of radio
- Watches 19 hours of cable and satellite TV and 15 hours of broadcast TV
- Devotes 3 hours listening to recorded music, reading the newspaper and surfing the Internet; and 2 hours reading magazines and books
- Spends less time sleeping and (given the proliferation of cell phones) more time on the phone

*Source: The Wall Street Journal, 1/26/04

THE STORY BEHIND ONE OF THE MOST RECOGNIZABLE CHARACTERS IN ADVERTISING: Aflac Duck

According to Aflac Inc., their duck character has done more for the life and disability insurer's brand recognition in less than five years than most advertising symbols achieve in decades. Launched in 2000, the national advertising campaign features a duck quacking, "AFLAAAAAC," with incredibly high-recall results: Aflac's name recognition increased from 12% to more than 90% as a result of the campaign.

Let's discuss how "character branding" can benefit YOUR business. I'll be calling you on to set up a time to meet and learn more about your current needs and objectives and show you how you can stand out when you ***ADD CHARACTER TO YOUR MARKETING!***

Sincerely,
[YOUR NAME]
[YOUR PHONE NO.]
[YOUR E-MAIL ADDRESS]

P.S. When we meet, I'll bring you a free [GIFT HERE], to thank you for your time.

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Phone Follow-up Scripts

If you get the prospect's voice mail:

Debbie, this is Ted Davies with Paradigm Partners. I am the one who sent you the plush toy mailing that discussed the idea of adding more character to your marketing. Would you be available [____date/time____] to meet? My phone number is 952-835-6622. Again, this is Ted Davies and my phone number is 952-835-6622. Have a super day, and I look forward to our meeting.

When you reach the prospect:

Debbie, this is Ted Davies with Paradigm Partners. I am the one who sent you the plush toy mailing that discussed the idea of adding more character to your marketing. Would you be available [____date/time____] to meet?

Objections/Answers:

1. Debbie Response: *I do not have time.*

Ted Answer: I understand. We have been working with clients like Sandoz Nutrition, Phillips Liquor Mr. Donut, and many others over the years, helping them build brand identity through character marketing. These long-term relationships are based on the successes we have generated. I know your time is valuable; that is why I feel it would be worth your time to meet. Would you be available [____date/time____]?

2. Debbie Response: *I do not think character marketing is for us.*

Ted Answer: I understand. Nor did Aflac, GEICO, General Mills or Pillsbury when they first entertained the idea. I would value your firsthand opinion on this opportunity. Would you be available [____date/time____]?

3. Debbie Response: *See my ad agency.*

Ted Answer: I understand, and most times with my initial phone call, my current clients reacted the same way. The purpose, again, is to showcase the great ideas we have to help you increase your brand image. I respect your authority, and if after thirty minutes you want me to leave, I will. Would you be available [____date/time____]?

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The Customer Interview–Best Practices

First, start the meeting by getting to know your customer.

- Ask the opening question: How did you get started here?
- Then proceed by stating: I would like to do two things here today. The first is to share with you my expertise and how I have helped clients use character marketing. And the second is to gain a better understanding of your plans to promote your brand. Is this okay with you?
- Next, confirm the length of the meeting: Do we still have until _____?
- Now state your 20-second elevator speech.
- Then review your bio/company brochure.
- Then review a case study from your portfolio.
- Wrap up this part of the interview by asking: Do you have any questions about my expertise or my company?

Now it's time to transition to learning about the prospect's business. Following are key questions to ask. You will find that based on your prospect's answers, there will be additional information you might want to ask for, as well.

- What are your different product categories?
- Can you describe who your typical customer is for each product category?
- Why do they want this product/service?
- How do they buy it?
- What is your market share?
- What are the differences between you and your competitors?
- How do you differentiate yourself from the competition?
- What does your competition do to differentiate themselves from you and others?
- What types of advertising and promotion do you use?
- Can you share with me your advertising and promotion budget for the year?
- How do you measure the effectiveness of your advertising and promotion?
- How important is it to you that your advertising has high recall?
- Would you be interested in seeing some ideas that would help increase your recall rate by double digit increase?
- What day next week would be good to get back together to review some ideas?
- Who else might you want in the meeting to review the ideas with us?

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Proposal Sample

Date Here

Confidential Conceptual Proposal

Clients: List Names Here
Project: List Project Title Here

1. Client Direction

- Client is a quick serve restaurant
- 500 locations
- 1,000 people eat at each location per week
- Customer profile: Families with children ages 4-15; all ethnic backgrounds; household incomes range from \$40,000 to \$120,000
- Offer sit down or drive up service
- Menu prices range from \$1 to \$15 per meal per person
- Consumers have many choices for quick serve food
- Mom is the primary decision maker
- Children can be big influence because of the fun atmosphere

2. Client Objectives:

- Increase visits during November–December when families generally do not eat at quick serve restaurants.

3. Client Budget:

- \$100 per store for POS; the promotion would have to be self-liquidating or paid for by one of client's suppliers.

4. Strategy and Tactical Plan

- We are recommending a character marketing strategy, utilizing a custom-designed collectable Santa Bear. Option: a collectable snowman called Snezy or Achoo
- The offer would be self-liquidating with meal purchase. For example, with purchases of \$50 or more, you can buy the Santa Bear for \$12.99. Regular price \$24.95.
- Cause overlay: \$2 of purchase price will be donated to a charity for children.
- Each store will be given an allocation of bears every two weeks. This will create a sense of urgency and demand for the collectable.
- Consumer would be given a punch card. For every \$5 they purchase, they get a punch. This will motivate moms to come in additional times so they can get the collectable.
- Promotion timing: November –December.

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- POS: Posters and danglers will show the collectable and promote the charity. Table tents and counter cards will also promote the offer.
- Advertising: TV, radio, e-marketing and newspaper are options to build awareness.
- Other: Take-out bags can be printed with the offer, as well as meal receipts. Employees can wear buttons promoting the offer. Each store can run a coloring contest and the winner gets to present the check to charity and/or receives a free bear and/or a free party for their friends.
- Budget:
 - \$100 Promotion Kit sent to each store
 - Collectables: 500 stores, 1,000 people eat there each week and 10% will buy enough and pay for a bear or 100 people per week x 8 weeks x 500 stores = 400,000 bears at \$12.99 less \$2.00 = \$10.99 = \$4,396,000 budget all paid for by consumer.
- Risk: What if consumers are not interested and there are left-over bears? Bears can be sold without purchase just like other logo promotional items. The first year, you could go very conservative and estimate 5%. Keep in mind, production takes 12-14 weeks. We could test the offer in several stores in the late summer to gauge customer reaction.

5. Why Character Marketing and Cause Promotions Work

- The Advertising Recall Factor-It's proven that great performing ad campaigns keep working, long after their message has been seen or heard.
- Our favorite ads with high recall
 - Where's the beef?
 - Aflac Duck
 - Yo Quiero Taco Bell
 - Great Taste, Less Filling
 - Geico Gecko
- The importance of getting noticed. The average person is exposed to more than 3,000 ads per day. If your ads go unnoticed, you are simply wasting your budget.
- A telephone survey of 1,000 U.S. households found that about one-fifth of all households purchased a plush, stuffed or beanbag toy in the past year. Households under 45 years of age are the prime market for plush, while households with children present are twice as likely to buy plush than single person or two-person homes. "Demographically, women are more likely to buy plush than men. However, when men shop for plush, they are searching out gift items and tend to spend more than the typical \$11 to \$22 price tag," according to Pam Danziger, president of Unity Marketing and author of the book *Why People Buy Things They Don't Need* (Ithaca, NY: Paramount Market Publishing, 2002).
- According to an article in PROMO Magazine:
 - 77% of U.S. consumers want companies to commit to a specific cause for a long time, instead of running short promotions with several causes. (That's up from 66% in 1993.)

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- 83% of U.S. consumers have a more positive image of a company that supports a cause they care about.
- 86% of consumers with household income over \$50,000 have a more positive image of such a company.
- 94% of Influentials—the 20 million Americans defined by Roper as those who influence their social circles—have a more positive image of a company that supports a cause they care about.

6. Next Steps

- Agree on character marketing strategy
- Select the collectable and agree on offer and projections
- Determine test
- Determine the POS
- Agreement to proceed
- Submit detailed budget

Authorization to Proceed for Pages X-X

Your signature authorizes us to proceed with the development of the character marketing campaign. If for any reason this campaign is canceled, we retain the right to bill for our time to date and other costs incurred.

Name _____

Title _____

Company _____

Date _____

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Next Steps to Selling Character Marketing

- Complete the sales plan
- Send out the prospect letter with newsletter to clients and prospects
- Order samples to show
- Add your logo to the Character Marketing Power Point
- Get on the phone to set up appointments
- Call Jim Socci if you need help with the appointment and or coming up with character marketing ideas