

COGstrategy[®]

COMMUNICATIONS STRATEGY

Case Study – Shoreline AWC



DISCOVER



THE COG STRATEGY APPROACH TO COMMUNICATIONS

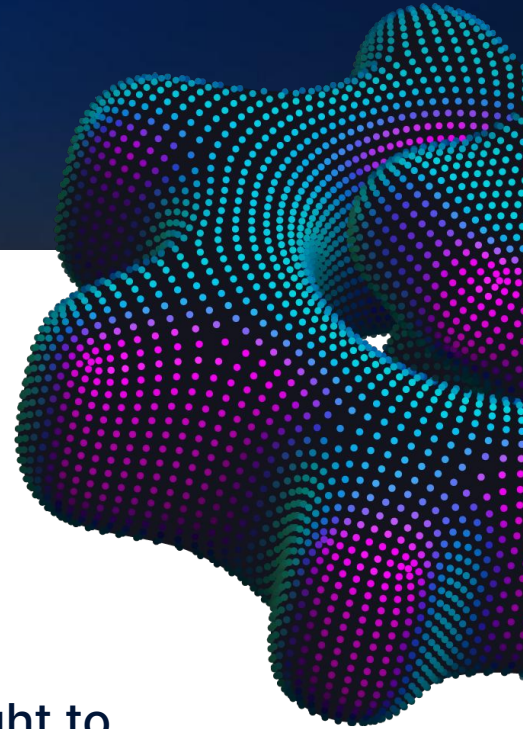


This document will introduce you to one of the COG Strategy Communications Strategy projects as a simple case study.

It supports our work experience and provides some insight to how we connect brand to business and provide value in our brand and marketing services.

Read through, enjoy, and get in touch anytime!

START!



COGstrategy®

Shoreline

Marketing Planner

September 2021



WHAT WE KNEW FROM THE START

Shoreline approached COG Strategy with a brief to perform a Communications Strategy prior to executing paid performance marketing, performance content marketing and overhauling workflows for client onboarding and website updates.

The [Shoreline](#) Communications Strategy is plan to communicate directly with customers, partners and staff that includes considerations to who Shoreline are talking to, why the business is talking to them, how and when Shoreline will talk to them, what form of communication the content should take and what channels Shoreline should use to share it.

The Shoreline brand was a disconnected entity that had little structure in it's marketing communications or integration between brand assets.

With a business operating across a niche market sector and an international geography, there was a need to overhaul the communication channels that currently deliver results to the business, and an immediate requirement to bring strategy into the brand touchpoints to allow a global team the reach and results from the brand touchpoints that had been neglected.

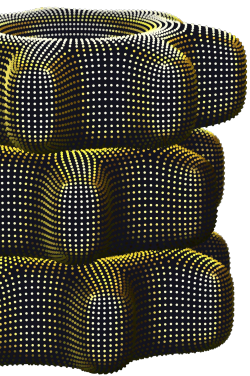


ABOUT THE CLIENT

Shoreline is a global management consulting firm focused solely on the needs of the asset and wealth management industry.

With offices in Sydney, Melbourne, Singapore and Toronto they serve leading asset managers, asset owners, investment platforms, and superannuation and pension funds across the globe.

The Shoreline AWC singular focus on the asset and wealth management industry gives us a unique edge, enabling them to provide industry specific guidance and services that generate real value and tangible results.



BRAND
OVERVIEW AND
OBJECTIVES

Marketing Planner Brand Objectives

- Build Brand Resonance and continue to support the existing business and industry WOM culture.
- Build Domain Equity and Authority to provide the brand and business a digital touchpoint that supports a Owned Media strategy and also a sustainable approach to digital marketing.
- Translate the Shoreline Communications Strategy into outreaching marketing communications.
- Build brand assets that the Shoreline target wants and needs.

FROM THE CLIENT

*“Highly detailed and accurate delivery of work.
Definitely first class and well researched”*

- [John DiBiase](#)
Managing Director





THE COG STRATEGY SERVICES IN THIS COMMUNICATIONS PROJECT.

GOAL DEFINING

We establish specific goals for communications strategies. It's important for us to then link these goals closely to business objectives to reflect best practices, the company's vision, and its mission statements.

KNOW THE AUDIENCE

Central to any successful communication strategy is delivering the right message to the right person at the right time - with the right tools. Here we research to discover insights that underpin the strategy going forward.

CREATE A STRATEGY

To achieve the desired outcome, we define a clear strategy, based on our clients goals and the audience. This allows us to build detailed and measurable actions in a number of different ways.

CONFIRM

When the strategy has been established and agreed on, the tactics for execution are discussed. The delivery team adds the actions, dates, and names of key stakeholders responsible for each against a clear and measurable plan.

REVIEW

Measurable deliveries with clear due dates make it easy to monitor progress. But things change and we anticipate bottlenecks and delays. Delivery team members are encouraged to provide input and feedback as we implement the program.



MAIN CHALLENGES

Whether you are starting your first project or have a lot of experience, one thing is for certain nothing that is worth doing is easy, nor is it meant to be.

All projects have challenges and people really rely on COG Strategy for our astute and confident project management.

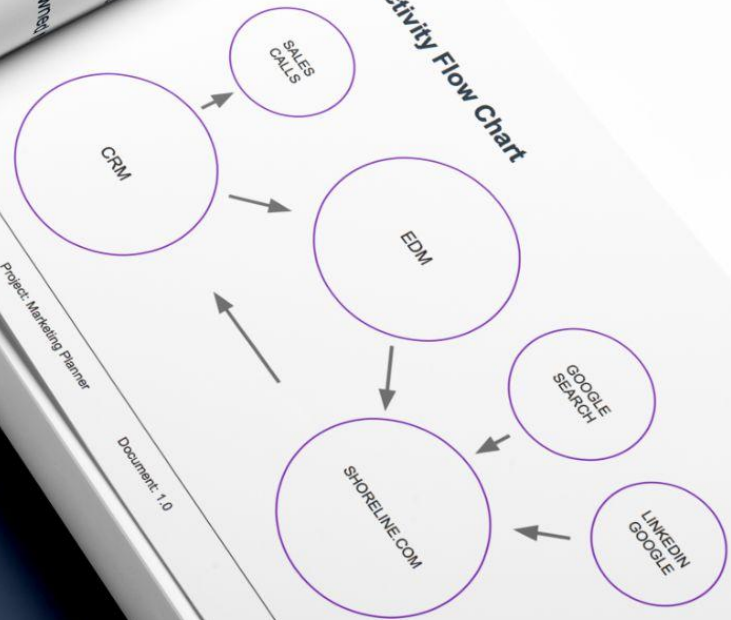
Our team proactively engages with our clients during the project planning phase to ensure we meet the exact requirements as well as understand the expectations.

- **Specialist Financial Services Industry**
- **Global Regions.**
- **Various products and services with unique USP's**
- **Front and back office stakeholder engagement**

Software Connectivity
Business can onboard some of the most sophisticated execution of digital marketing agency and streamline what used to be manual tasks.
EDM: Owned Media Systems (EDM): Owned Media Systems integrates with CRM and provides insights sections.
Use the CRM to manage Owned Media and conversions.

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Connectivity Flow Chart



19 Shoreline

Project: Marketing Partner

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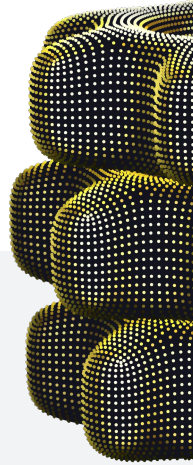


BRIEF SUMMARY

Shoreline approached COG Strategy with a brief to review the businesses marketing and communications, including their digital assets and workflows.

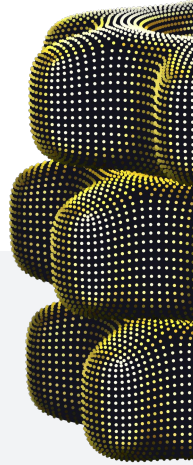
The Shoreline AWC Communications Strategy was isolated as the initial first required project as COG Strategy determined that the fundamental issues in this instance pertained to fragmented marketing communications and disjointed service delivery across the organisation. The COG Strategy Communications work would align truth insights provided from within the senior management team against product and service delivery, and structure them in a framework that would allow autonomous mar. comms. for Shoreline to manage.

This would commence a broader marketing communications strategy for the [Shoreline](#) business.





SOLUTIONS SUMMARY



The COG Strategy approach to marketing communications for SME business is to initially take a high level snapshot audit of current brand and marketing. Most brands are made of many moving parts (*no coincidence that a 'cog' in an engine may spring to mind here right*), and the Shoreline AWC brand and business is no different to many others.

Research: With our research and auditing process we make discoveries via working directly with the team and diving deep into the brand and marketing channels in which the business operates.

Insight: Within the research there is always golden nuggets of truth and actuals the form the core decision making and planning for future strategy works. With core insights we're able to provide solutions that are appropriate, commercially viable and meet customer and market expectations.

Framework, Strategies, Planners: Our strategy work is delivered to ensure our clients can autonomously manage and drive the plan through the business without COG Strategy needing to implement every step of the way. Our work is value focused and we know we need to build intelligence client side.



18 Shortline

Project Marketing Planner

Document 1.0

Project Marketing Planner

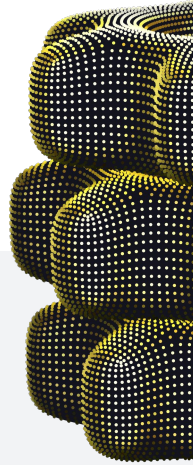
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RESULTS SUMMARY



Shoreline AWC now manages their own communications strategy that is circulated within the business senior management and marketing team as a plan that ensures strategic communication takes place with their targeted audience.

The Shoreline communication strategy helped the business to define the communication objectives, refine the audience and articulate the brand messages to clients, customers and team members.

The Communications Strategy includes a framework that clearly defines who Shoreline should be talking to, clarification on why the business is wanting to talk to them, how and when Shoreline will deploy marketing campaigns, and a rationale on media type and advertising budget.

The discoveries made within the Shoreline auditing process delivered key research and insight which offered [COG Strategy](#)'s client a dashboard of current business and brand information, and as per the initial brief was able to then be rolled into other projects such as [digital marketing](#) workflows and website technology upgrades.



THE COG STRATEGY PRODUCT SOLUTIONS

[DOWNLOAD THE PRODUCT GUIDE](#)



[LEARN MORE >](#)



**WE'VE DELIVERED PROJECT SUCCESS
FOR COMPANIES THAT YOU KNOW.**

**BUT WE'RE SMALL BUSINESS
SPECIALISTS READY FOR NEW
PARTNERSHIPS.**



CLAIM YOUR FREE 30-MINUTE BRIEFING SESSION

Getting results like this case study is only a phone call away.

If you're serious about dominating your market and maximizing — down to the last dollar — your branding ROI, you must step up and take brand marketing seriously.

If you have any questions, or would like our help on implementing the type of strategy we've presented here take advantage of our free 30-minute strategy session where we'll discuss your business goals and challenges.

Please note this is not a sales call. You will be speaking with one of our highly experienced marketing experts, not a salesman.

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