

## Shoreline Communications Strategy Case Study

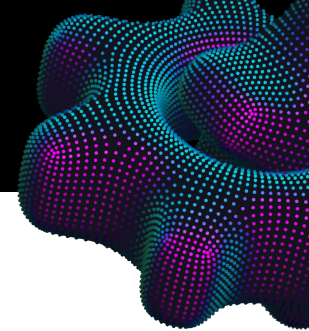


**DISCOVER**



Case Study

# Shoreline Communications Strategy



This document will introduce you to one of the COG Branding 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.

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.

Read through, enjoy, and get in touch anytime!

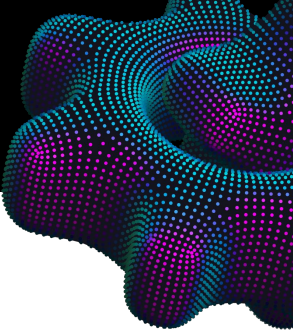


**Luke Sullivan**  
Managing Director  
COG Branding

COGstrategy®

**Shoreline**  
**Marketing Planner**  
September 2021

**START!**  
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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.



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

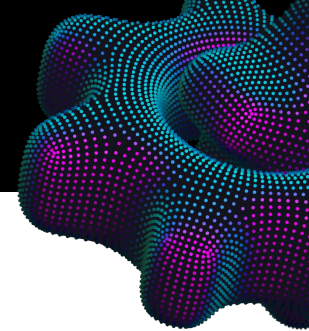
**Marketing Planner Brand Objectives**

- 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.



## Case Study

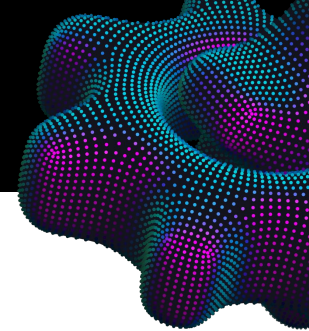
# From the client



“Highly detailed and accurate delivery of work. Definitely first class and well researched. The capacity of Luke and the COG Branding team ensured we could execute all communications and marketing projects within the same scope of work. I can highly recommend”



**John DiBiase**  
Managing Director  
Shoreline



## **GOAL DEFINITION**

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.

## **AUDIENCE RESEARCH AND IDENTIFICATION**

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.

## **STRATEGY DEVELOPMENT**

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.

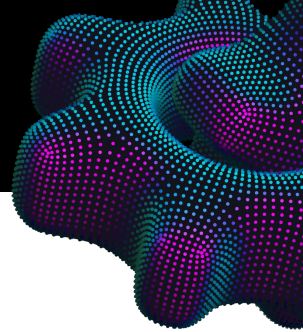
## **TACTICS AND PROJECT SCOPING**

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.

## **RESEARCH AND INSIGHTS**

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.





Whether you are starting your first project or have a lot of experience, one thing is for certain – there will be challenges!

All projects will encounter hurdles and toll gates that are tough to get through - here your partners are key. With strong leadership that drives astute and confident project management, any challenges will be met with gusto!

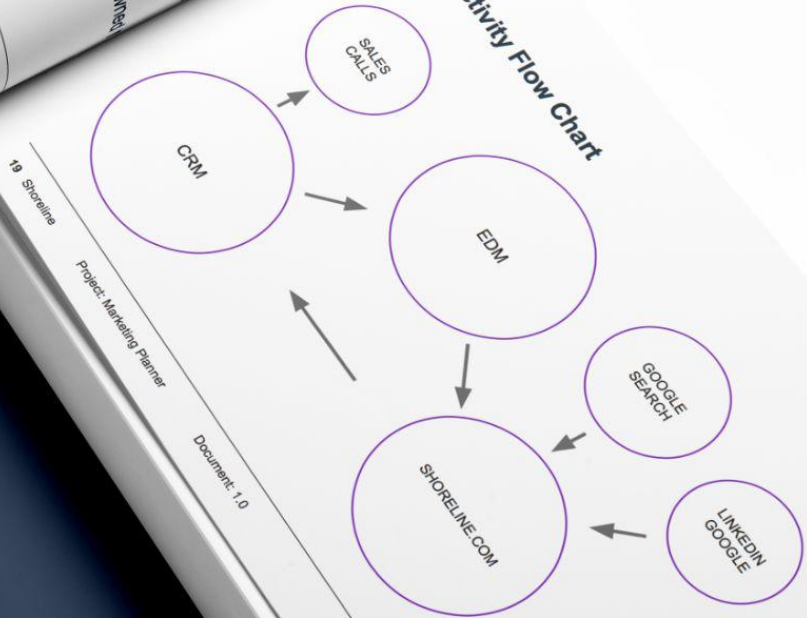
Our team proactively engages with our clients during the project planning phase to ensure we meet the exact requirements as well as understand the expectations.

- **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  
Integrates with CRM and provides insights sections.  
Use CRM to manage Owned Media and conversions.

Document: 1.0

### Connectivity Flow Chart

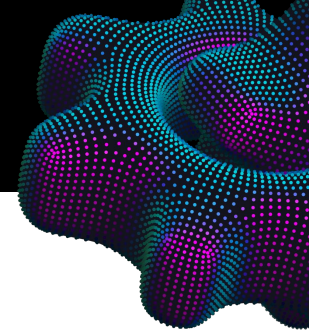


19 Shoreline

Project: Marketing Planner

Document: 1.0

COGstrategy

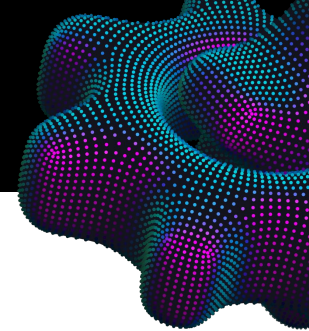


Shoreline approached COG Branding with a brief to review the businesses marketing and communications, including their digital assets and workflows.

The Shoreline AWC Communications Strategy was isolated as the initial first required project as Branding determined that the fundamental issues in this instance pertained to fragmented marketing communications and disjointed service delivery across the organisation.

The COG Branding 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 AWC business.



The COG Branding 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 Branding needing to implement every step of the way. Our work is value focused and we know we need to build intelligence client side.



18 Shortlines

Project Marketing Planner

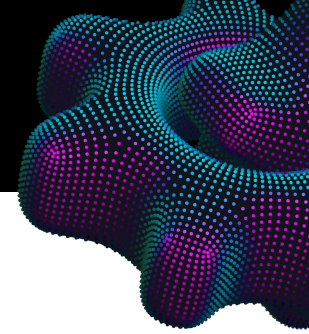
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## 2022 Planner

Project Marketing Planner

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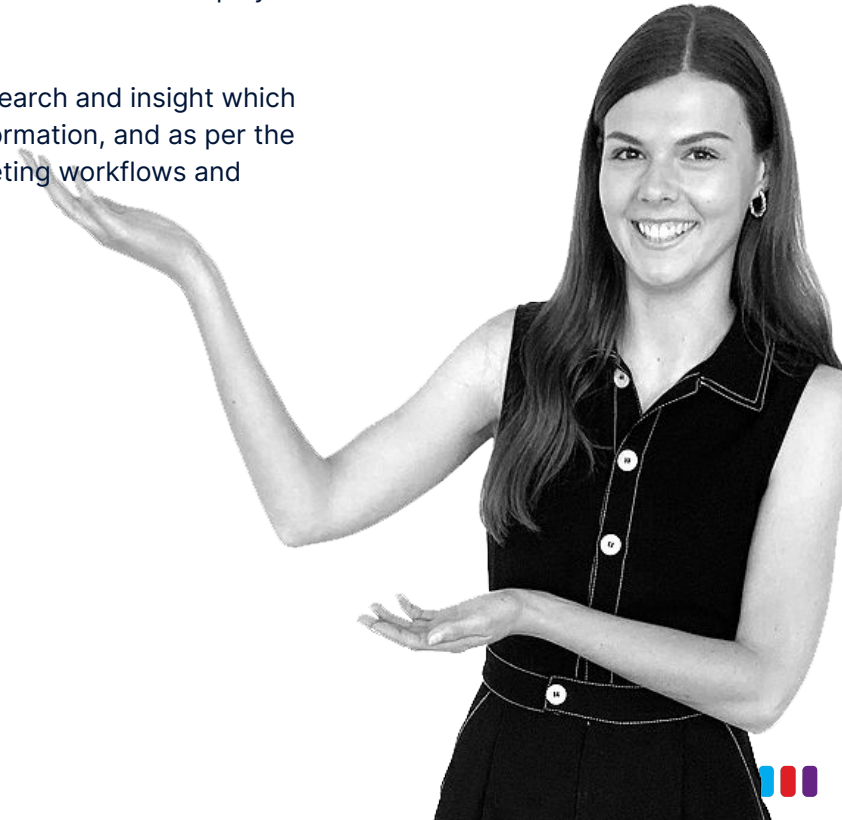


Shoreline AWC now manages their own communications strategy that is circulated within the business senior management and marketing team as a plan that ensures strategic communication takes place with their targeted audience.

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 Branding'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.



# Where We've Earned Our Experience



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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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