



How to Create Effective Collateral

What is collateral?

Collateral is the collection of media used as part of an organization's marketing strategy. It differs from advertising in that it is used later in the sales cycle, usually when the purchaser has been identified and when they are making contact with the organization. In addition to marketing the specific item or service, the collateral piece can and should be used to enhance and promote the brand of the product. The production of marketing collateral is an important component in any business' marketing communication plan.

Common examples of tourism marketing collateral include:

- Sales brochures and other printed product information
- Rack cards
- Visitor's Guides
- Business Cards
- Posters and signs
- Web Content

How can we define "effective collateral"?

- It sells the experience
- It is distinctive
- It markets to the target audience
- It provides pertinent information
- It is easy to understand
- It is visually appealing – the use of color and images are appropriate to the product
- It enhances the brand

Where do I begin?

The 5 key steps in the process:

- Identify ideas, objective and budget
- Create a design brief
- Determine a project plan
- Layout, proofread, edit and proofread again
- Print and distribute

Ideas, Objective and Budget:

The first step in the process is to specifically identify what the goal of your collateral piece is. This is a high level discussion or understanding of what the piece will - and will not - be and the ultimate goal in producing the piece.

What is the goal in creating this piece? Use measurable goals if at all possible, instead of "to increase bookings" be more specific such as "to increase bookings from in state travelers in summer months".

What is the call to action? Do you want to drive consumers who are planning a future vacation to go to your web site, where they can get more detailed information, or do you want to capture the attention of a traveler who is already in the area so that they will drop in?

What is your piece- a rack card? Is it mailing piece? Or is it a handout? Or is it a combination of these?

Know your audience. Is your particular destination very well known among your target audience, so that you can more tightly focus on your experience or product? Or will you need to devote "real estate" on the piece to also market your overall destination?

What is your budget? It is best to define that first, and then proceed with a plan to get the very most out of your budget that you can. If your budget is limited, your suppliers can be a huge help with ways to stretch your dollars. Sit down with them and you will be surprised at the number of suggestions they have. Sometimes you can save money simply by taking ¼" off the size of a brochure or getting creative with your color options. Ensuring that you pick a paper that is a stock paper is a great way to save money. In determining your budget, always ensure you get detailed estimates or quotes from your suppliers, not just a total cost. In order to compare quotes from competing suppliers, you will need the details to ensure that you are comparing apples to apples.

For example, a quote from a printer should include:

- The project start date
- The project number
- The name of the project
- The type of output
- The flat size
- The finished (folded) size
- The number of pages
- The number of sides, single-sided and double-sided
- Colors
- Bleeds
- Paper stock
- Finishing instructions
- Proofs needed
- Quantity
- The delivery instructions





- The desired time frame for printing
- Any special notes

Components of your project budget might include:

Design / Copywriting

Graphic Designer
Copy Writer
Photography - usage rights
Software
Online templates
Proofreading

Printing / Materials

Paper
Proofs
Printing
Binding
Folding

Distribution

Postage or insertion costs
Shipping materials (envelopes, labels, etc)
Storage

Creating a design brief:

Provide yourself a design brief that clearly identifies your ideas, objectives and budget. This will be easier if you know who your target readers are and your main purpose for your printing project. Doing so will also make it easy to customize your project (the design, fonts, graphics, and color) according to the target market you have chosen for that piece. Moreover, having a design brief will also help you stay within your budget and deadline.

Project Planning:

The project plan should incorporate all steps of the process from project inception through distribution. For example, AOT's project calendar for the Official State Visitor's Guide includes 8 months of activity and 46 project milestones.

The project plan should be determined by the last point in the process – having your piece in the hands of your target audience. All steps of the project plan should have their own individual deadlines as well. In order to set individual deadlines, begin with the date that you want your target audience to have the collateral piece in hand. Then work your way backward to the design stage. Ensure that you have allocated sufficient time for corrections and editing, especially if you need to have others review your piece.

Layout, proofread, edit and proofread again:

Some things to keep in mind when designing the layout of your collateral piece are the following:

- For rack cards, the top 1/3 of the card must "hook" the reader. It is often the only part of the card that will show when the cards are placed on a card rack.

- Use fresh, updated photography. Dated photography will give the impression that your facilities are dated.
- Give the audience a call to action – such as going to the web address, calling the phone number, etc.
- Ensure the contact information remains current, relevant and specific
 - Email – set up an email that is affiliated with the company, not an individual
 - Web – use the top level addresses, such as www.arizonaguide.com instead of an address such as <http://www.arizonaguide.com/Page.aspx?pid=77>
 - Triple check the phone numbers to ensure accuracy
- Provide relevant and specific information. i.e. phone numbers, directions, admission details, and times of opening, contact information.

Images:

When using photos, illustrations, or fonts, you must purchase the right to use them in your work. Without purchasing that right, you're opening yourself to financial liability – and those fines could easily exceed what you might have paid for those rights in the first place. The internet has allowed photographers, designers and illustrators to easily police their work and whether it is being used without compensation.

The purchase of copyright isn't really necessary (and many photographers will not want to sell that anyway). An exclusive, unlimited usage license should be purchased instead. The reason for the distinction is that if you own the copyright then the photographer or illustrator is legally unable to create copies of the work for use in their own portfolios or on their own web sites. Paying for a "full buyout" or the exclusive, unlimited use means that no other company can use the image, and your company can use the image anywhere, anytime, in perpetuity.

If you don't have the money or need for the full buyout, you can purchase a smaller license. You can buy usage for one year, or a small geographic area. Generally, if it's a photo shoot you've arranged, there's no point in the reduced license as the cost of the shoot will include the full buyout license for a nominal fee. However, if you've found the image on a web site and want it for your project, take a look at how you wish to use it and negotiate with the photographer based on that usage.

Once you have the high resolution illustration or image, make sure you track your usage of the image. If you have not purchased a full buyout and your rights are limited you need to be sure that you don't illegally reproduce the image. The photographer or illustrator can always be contacted to negotiate a reasonable re-use fee (normally a 50% discount is applied for all uses after the first) if you have the need to use the image beyond what you had originally contracted for.

Like images, when you purchase fonts, you buy usage rights, not the font outright. There are many free font sites out there, make sure you look at the fontographer's notes. Many fontographers do not grant free use for commercial interests. If you're using it in your advertising or collateral, you'll need to get the ok from the originator of the font.





Proofreading and Editing:

Things to look for when proofreading and editing your piece:

- spelling
- capitalization
- punctuation
- grammar
- abbreviations
- word usage
- sentence structure
- continuity
- consistency
- voice
- factual correctness
- telephone numbers
- addresses

Also consider:

- Will word breaks confuse the reader?
- Do photos and captions correspond?
- Has the same font - typeface - been used consistently?
- Is there a lone word - or couple of small words - on the last line of a paragraph?

Print production and distribution:

One of the most important decisions that will impact the final look and feel of the piece will be the paper that the piece is printed on. Paper can be either coated or uncoated.

Coated papers have a slicker feel and can be glossy or matte. This type of paper is typically used for collateral pieces such as brochures and rack cards. Photographic images print more clearly and with more vibrancy on a coated sheet, because the coating keeps the ink from soaking into the sheet.

Uncoated papers are used for stationery and fine collateral pieces. If the choice to use uncoated papers is made up front, then the design can be done with an uncoated sheet in mind. By doing so you can get a very elegant looking and feeling piece at a low cost.

Print production works in acronyms, here are some you might come across:

- PMS - Pantone Matching System.
Pantone colors are specific ink mixes that create a color standard.
- CMYK - Process color. Cyan, Magenta, Yellow and Black.
This is the most common color printing. These 4 colors are combined to create all the colors you see in printed pieces.
- RGB - Digital color. Your monitor uses it - Red, Green, Blue.
This color profile is often used for digital and new media work. This is generally used in JPEG.
- PSD - Photoshop file. PSD files are layered photographic files created by Photoshop.
- TIFF – A Tagged Image File Format. A flattened Photoshop file.
- JPEG, JPG – The format most used for storing and transmitting photographs on the internet. Generally, this is the most common method of compressing and transferring image files. They can be used for print, but generally do not have enough resolution and the correct color profile for printing.
- EPS - Encapsulated postscript. They are usually created in Adobe Illustrator. EPS files are usually vector art, which is the use of points, lines, and curves based on mathematical equations to represent images on your computer graphics; they are another common format found in press-ready files.

When someone requests working or native files, they are asking for the files used to generate the graphics. This means fonts, images as separate files that are linked to the page layout (Quark or InDesign) file. Working files are necessary if adjustments might need to be made.

However, it is usually best to send your printer an Adobe .PDF, packaged Quark or InDesign file instead of native files. It is less likely that a printer will be able to manipulate this type of file; therefore, errors in printing can be minimized.

When checking printer's proofs here are some things to look for:

- Ensure that all elements of the final, approved, camera-ready text appear in the printer's proofs. Compare them line by line as fonts can sometimes default and move around.
- Verify ink colors and intensity on every page.
- Make sure there are no scratches, blobs or other unintended marks on every page.
- Make sure the document is assembled correctly.
- Ask only for essential corrections. Any corrections made by the printer will be extremely costly.

Distribution Considerations:

Critical points to keep in mind regarding mailing pieces:

Piece size:

The three common categories of mailing pieces are postcard, letter, and flat. Each size has a minimum and maximum height and length. To ensure maximum postage discounts, the mailing piece must fall within the size parameters.

Weight and thickness:

Weight requirements apply to all types of mail. If your mailing piece exceeds its maximum weight and/or thickness, a postage surcharge will apply.

Address blocks:

Each mailing piece must have a complete return address that does not exceed 50 percent of the length of the piece or 33 percent of its height. The delivery address must appear on the "mail panel"—which is the same side as the indicia and the return address. The area in which the delivery address appears must be clear of any dark ink or graphics that may interfere with the Optical Character Reader (OCR)—the postal equipment that reads the address. The "OCR Read Area" is a rectangular space that begins 2-3/4 inches from the bottom of the piece and extends no further than 1/2 inch from either side and is 5/8 inch from the bottom edge.

Indicia:

The indicia is the most common and practical method of paying postage when doing a mailing. The indicia must be placed in the upper right-hand corner—at least 1/4" from the left edge and 1/4" from the top edge. It must contain specific information, including the mail class, mailer's permit number, the location of the post office of mailing, and the words "U.S. Postage Paid." The words "Bulk Rate" are no longer acceptable anywhere in the indicia.

Tabs:

When a self-mailer has more than one panel or multiple pages, tabs must be affixed to the piece to keep it closed. This ensures that it will run through the post office's mailing equipment. The placement of the tabs depends on the design and weight of the mailing piece.

Co-operative mailing programs:

AOT offers the opportunity for interested DMO's to insert their collateral materials into AOT's outgoing travel packets for a minimal per piece charge. For more information about this program, please contact Robin Jackalone, Fulfillment Manager, rjackalone@azot.gov or 602-364-3712.



Appendix 1:

A Paper Primer

COATED PAPERS - OVERVIEW

Coated papers have a smooth clay coating applied over a freesheet or groundwood base paper. The base paper is made first, then put through a “bath” of clay coating or coated while running on a machine, with a blade and calendar rollers smoothing out the coating on the paper.

The clay coating often accounts for as much as half the weight of the paper. Therefore, 10% post consumer fiber content in a coated paper may actually equal only 5% of the total sheet.

They are particularly valued by many for their crisp, vibrant reproduction of four-color graphics and photographs.

Coated papers are categorized into grades by their brightness and gloss levels. The coating may be finished to a high or dull gloss, or may be matte (not glossy), with other slight variations on these categories.

“Matte” finish coated papers are chosen for their look, when a gloss coated paper does not convey the context or “feel” that the paper specifier wants to project.

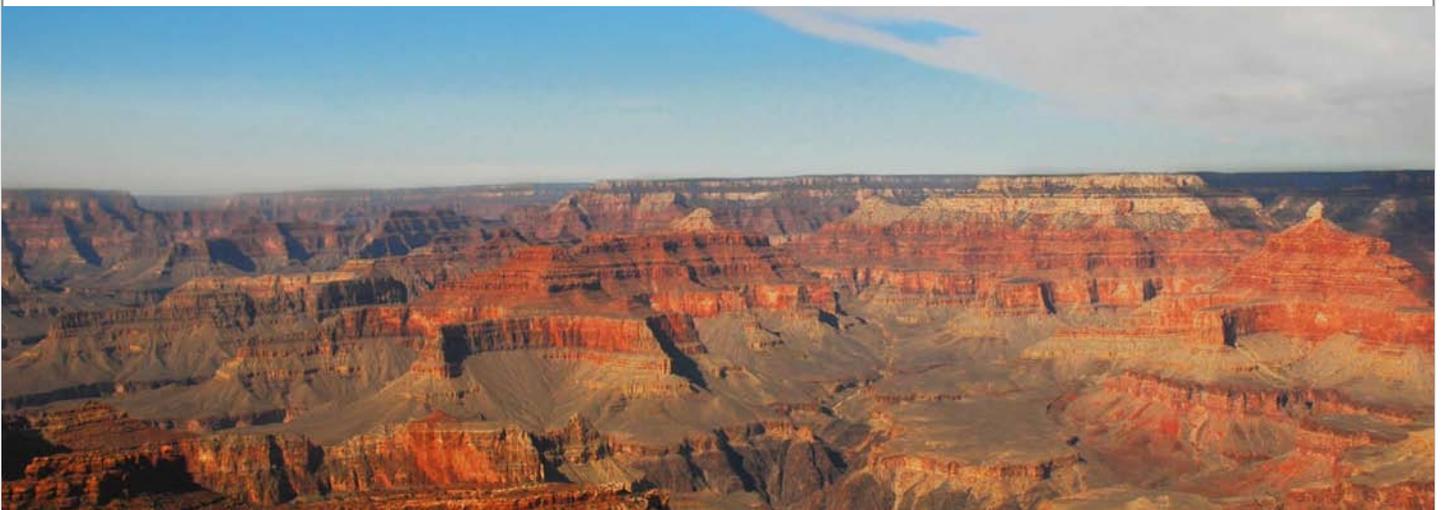
The coating on matte grades is not slick or shiny, but it is also excellent in reproducing 4-color printing processes.

Premium Coated

- Clay coating over a freesheet base paper
- The brightest and highest quality grade of coated papers
- Tends to be a slightly heavier paper than other coated sheets
- Most often used for high-end and luxury productions such as fine art reproduction, prestige marketing materials, luxury car brochures
- Might be used to “set the tone” or create an impression, such as for the cover of an annual report
- Excellent 4-color reproduction
- Most expensive of the coated papers

Coated #1

- Clay coating over a freesheet base paper
- Very similar to Premium Coated, but somewhat less expensive
- Preferable for multi-page productions, since the quality is close to Premium but the cost is lower
- Might be used for art books, art-quality posters, high-end advertising, expensive coffee table books
- Excellent 4-color reproduction





Coated #2

- Clay coating over a freesheet base paper
- Less expensive than Coated #1
- A better quality coated paper than lower grades, used frequently for high quality magazines, posters, advertising

Coated #3

- Less expensive than Coated #2
- The largest segment of coated papers sold through paper merchants, a typical coated paper grade stocked by paper distributors
- The largest segment of coated papers sold in sheets (in addition to web rolls)
- Most often used for advertising, brochures, higher-end catalogs, selective high quality magazines (e.g. National Geographic)

Coated #4

- Clay coating on a groundwood base paper
- Typically sold directly to printers or publishers in truckload quantities, not usually through paper merchants
- Less bright and less expensive than freesheet coated papers
- Used for high volume magazines, catalogs, advertising

Coated #5

- Coated paper on a groundwood base paper
- The least bright and least expensive coated paper
- Used for mass marketing productions such as high-volume and frequently-published magazines (e.g. news weeklies) and high-volume catalogs

UNCOATED PAPER GRADES – OVERVIEW

Uncoated papers have a slightly fibrous surface rather than a clay coating

They may be made in big web rolls for printers, cut into various sheet sizes to fit printing presses, or trimmed to “cut-size” sheets for copiers and other office machines

Depending on the paper making process used, uncoated papers may have fiber contents from 70 - 90+ percent of the sheet.

Uncoated sheets used to be made predominantly in an “acid” process. But librarians and others began to realize several decades ago that the acidic quality of the paper limited its lifespan. Many papers are now made in an alkaline process, which results in an acid-free, archival quality paper.

They have a wide variety of finishes, depending on the intended use of the paper

They include Cover weights — thicker paper appropriate for report covers, heavy brochures, business cards, and similar uses

Offset:

- A “white commodity” paper, the workhorse paper of print shops, although may be made in colors as well
- Similar to bond paper, but prepared for effectiveness in printing operations

- A high volume, low economic-margin paper
- Premium Offset” is the highest quality offset, although otherwise “offsets” meet a common industry standard
- Finishes most frequently are smooth or vellum, but may also include slight patterning, as in laid or linen finishes
- Most frequently used for communications and advertising such as direct mail, bills, reports, or magazines

Opaque Paper:

- A higher-quality offset with higher opacity (less show-through)
- More expensive than commodity offset
- Because opacity is higher and therefore minimal printing shows through from front to back, printers can use a lighter weight opaque sheet than if using a commodity offset, which saves money when printing in high volumes (and saves money on mailing, as well)
- “Satin,” “Film Coat,” and “Thin Coat” finishes spread a very light clay coating on the paper (only about 6-8%) with a blade, then polish the paper to a smoother, tighter finish than other opaques. Computer manuals are frequently printed on this kind of paper. Lightweight Opaque” paper is the lightest weights made, often used for financial prospectuses, and bank and stock reports.

Text and Cover Paper:

- Often beautiful designer papers, both in white and colors, with a variety of finishes, often lightly patterned
- Some recycled Text and Cover papers have specks as part of their design. These specks may come from ink dispersed but left in the fibers during recycling without de-inking, but it frequently is colored fibers added back into the clean recycled pulp to introduce a design element.
- Tree-free papers are most frequently found in Text and Cover grades, which are easier to adapt to innovation than other printing and writing grades. They are also most likely to be cost-competitive in these grades.
- Frequently used for letterhead, brochures, invitations, and other kinds of communications
- Most appropriate for use in printing processes at print shops, while the slightly lighter and smoother Writing/Script papers, • which are often companions to Text and Cover lines, have become preferred for use in laser and other printers
- Text papers are often made into envelopes to match letterhead and invitations
- Cover weights are heavier papers appropriate for business cards, stiff brochures, report covers and other stiffer paper needs
- Text and Cover papers are made in both web rolls and also various printing paper sizes, to match different printing presses.



- Text and Cover papers are made with similar economies of scale whether they're made as recycled or virgin, so pricing is very competitive.

<http://www.conservatree.org/paper/PaperDesc.shtml> Editorial Resources:

Appendix II: Resources

- Mediabistro.com – check out the freelance marketplace. This is a New York-centric database, but there are also freelancers based across the U.S. There's a useful ranking system so you can see a writer's popularity amongst hiring editors. You can also find graphic design and photography talent here.
- Society of American Travel Writers – satw.org – Contact: LGFullman@aol.com. This organization is a clearinghouse for members. You can post a call for writers through the contact above. You can limit the call for talent to Arizona-based writers if you like.
- North American Travel Journalists Association – www.natja.org, Contact Elizabeth@natja.org
- Local and regional magazines (call the editor and inquire about freelance writing talent for your project)
- Your local newspaper's features departments (call the editor and ask if they can recommend freelance writing talent for your project)
- Writers you know – if a writer you know is not available or too expensive for your project, don't be shy about asking him or her for a recommendation. Experienced writers tend to know others who may need work. They may also know of rising talent you can hire for less-than-market rates.

Artistic Resources:

Freelance graphic design

- ifreelance.com
- <http://getafreelancer.com>
- elance.com
- guru.com

Photos

- Flickr.com – If you find images you would like to use, contact the flickr account holder and ask for permission. You can also find professional photographers this way. Frequently, amateurs will be happy with just a credit in your publications, or minimal payment. Flickr is constantly adding functionality, so check back often.
- istockphoto.com
- [Photos.com](http://photos.com)
- Shutterstock.com

Graphics / Fonts

- Veer.com for photos, fonts, graphic, etc.
- Fontshop.com for fonts
- <http://www.brusheezy.com> graphic effects
- www.stocklayouts.com for stock layout/templates for collateral

Fulfillment:

- AOT Joint Fulfillment Opportunities.
Insertion of collateral pieces into outgoing AOT travel packets AOT Fulfillment Manager 602-364-3712
- NXTBook: Digital fulfillment of print collateral pieces www.nxtbook.com