

## SAMPLE

# Volcorp 2009 Annual Report Creative Brief

## Background

This is the first annual report to be produced representing the newly merged Volcorp and Altaro groups. Both groups have had long histories of providing financial services in Australia, Altaro also in Asia Pacific. The Volcorp brand is well known, particularly in its home state of Western Australia, and its other main brand Niba is the well known brand outside of Western Australia. The multiple brands that make up the Altaro Group still have high profiles ie Asua, Jalcot, Main Insurance, and Prime Asia.

The 2009 Annual Report has an interesting story to tell – the history of two very well known financial organisations, and the strategies and future direction of a very strong, customer-focused merged group. Volcorp requires a theme, creative concepts and budget to produce their 2009 Annual Report.

## Concepts/deliverables

- 1 Theme
- 2 Creative concepts (x2), including:
  - Cover
  - Positioning /highlights section
  - Operations spread
  - Detailed Financials section
- 3 Budget

## Timing concepts

Proposals to be submitted by close of business Tuesday 12 June.

## Objectives of the 2009 Annual Report

- Demonstrate:
  - that the merger has successfully brought together two very successful financial services groups to create an even stronger business
  - that the new group has the potential to become the leading customer-focused, diversified, financial services provider in Australasia
  - that the group has a strong strategic presence in both insurance personal lines products and in commercial lines products, distributed via direct and intermediated channels
  - that the Group will be able to compete more actively and realise substantial synergies
  - that the merged group's wealth management business will benefit from significantly increased scale.
- Show that the banking business will be an important distribution channel for both Insurance and wealth management products.
- Outline improved opportunities to deliver increased medium and long term growth.
- Illustrate how the organisation operates in major geographic markets.
- Demonstrate the greater benefits for shareholders through increased market capitalisation.



## Key messages

The Volcorp Group's Purpose and Vision

**Purpose:** To help people build and protect their wealth and dreams (why we are in business).

**Vision:** To be the most respected financial services organisation in Australasia (we aspire to achieve).

Together with our shared human values and culture they form the foundation of our organisation).

The Annual Report should reflect the key messages.

## Our brand essence:

'Volcorp helps create wealth'

We differentiate ourselves from our competitors with a 'can do' solutions-focused attitude.

## Our personality:

Warm, friendly, smart, resourceful, straight to the point, contemporary, fresh, optimistic, enthusiastic.

## Audience

### Primary Audience

Retail shareholders

Institutional shareholders

Prospective investors

Employees

### Secondary Audience

Community groups and individuals

Regulators

Government

Media

Business Community

## Design

- Understated, clean, open and simple.
- Corporate (the Annual Report is Volcorp's only real corporate and marketing document) but with a warm, personal, human touch.
- The photographs will reflect the values of the Volcorp Group and display warm and friendly characteristics.
- Graphs should be simple, easy to read, no vertical text.
- The typography and flow of text should be easy to read.
- Prominent headings.
- Colour palette used in a way that is easy for elderly shareholders to read text.
- The Volcorp logo to be used on the front cover is the oblong format without the wording 'Finance, Investment'. On the front covers of all publications the logo is used bleeding off the top left side, as per the publishing guidelines.



# AnnualReportBestPracticeFactSheet

## Format

There will be 2 reports:

- 1 Annual Report of approximately 52 pages, plus 4 page cover (replicating Volcorp's 2006 Concise Report)

Size: A4

Stock: 250gsm Paralux Silk white cover, 135gsm Monza Paralux Silk white text

Use of full colour throughout the 'Corporate' section of the Annual Report.

- 2 Consolidated Financial Statements approximately 80 pages, plus four page cover

Size: A4

Stock: 200gsm Harvest recycled silk cover, 115gsm Harvest recycled silk text

Consolidated Financial Statements 2 colours – the cover should complement the Annual Report cover.

The Volcorp Brand guidelines can be used as a guide to the colour palette and typography, however, as this is a 'new look' group, greater flexibility to the design approach is appropriate.

Layout may complement Volcorp publishing guidelines however this is not essential.

**Content order** (see the Flat plan in the Brief - Specifications section at [www.annualreportbestpractice.com.au](http://www.annualreportbestpractice.com.au))

Front cover

Company Vision, Contents

Financial highlights/Operational highlights

Chairman's Report

Managing Director's Report

Who we are

What we do

Year in Review

Group Executive biographies

Group Operations

Retail Banking

Business Banking

General Insurance

Divisional Reports

Wealth Management

Our People

Our Community

Corporate Social Responsibility

Board of Directors

Corporate Governance

Directors' Report

Financial Summary

Financial Statements (separate report)

Shareholder/Noteholder information

Key Dates

Contacts

Back cover

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## Timeline

Text and photos will be available from late July onwards.

The financial statements will be available for typesetting 16 August.

(The CFO will deal with the designer for the Financials).

All artwork for both the Annual Report and Consolidated Financial Statements to be completed by 3 September.

Press checks will be required. The printer will be Bambra Press.

The documents must be printed, bound and processed by the mailing house ready to be mailed to shareholders no later than Friday 28 September.

Detailed timetables will be prepared in conjunction with all suppliers.

## Additional, but complementary design requirements

A4 covers for the two subsidiary Annual Reports:

- Volcorp Life & Superannuation Ltd
- Volcorp Insurance Ltd

Using Annual Report cover as a design guideline and relevant photos from the Annual Report to build two additional covers. (Artwork only needed – file suitable for digital printing).

## Shareholder pack

Design the front cover of the shareholder pack using the Annual Report cover (2 versions).

## Notice of Meeting

Design the Notice of Meeting using style from the Annual Report.

## Explanatory Memorandum

Design, typeset and prepare file.

- to be printed 2 colour only (offset if time permits or alternatively a file to be sent to Security Mail for printing)
- extent 2-4 pages (subject to confirmation)
- photos of any directors up for re-election to be included.

## Copyright

Copyright of all images and design is to be assigned to Volcorp on completion of the project.

