

Marketing in Latin America under budget constraints

Karen Netto

There are times in a translation project manager's life when it is tempting to call upon the services of the United Nations and its diplomatic skills.

Ideally every region would have its own localized version of a translation, but in the real world, budget constraints – particularly in these tough economic times – force compromises in terminology and cultural preferences. As a result, at least one interested party seems to end up dissatisfied with the quality of the end product and the debate can run and run from project to project. In my experience, the most vociferous debate arises due to the imposition of “international” Spanish terminology on countries in Latin or South America.

The following anecdote relates how the Latin American Spanish issue was tackled and resolved in partnership between a client in financial asset management, its US office and its main language service provider (LSP). The company was at an early stage in localization maturity and had recently centralized the translation management function within the marketing department, following a series of quality complaints. As the project manager, it was my role to create the new processes within the company and improve quality in liaison with external translation suppliers. Improving the perceived quality of Spanish translations proved to be the most demanding.

Which flavor Spanish?

The asset management company had a total of four reviewers working on Spanish translations and feedback was therefore inconsistent. The feedback created problems for the LSP in maintaining a satisfactory translation memory (TM). Attempts had been made to resolve the issues in the past with a style guide and terminology list,

but there were basic, ongoing disagreements about key terminology between the reviewers. There was no established hierarchy over whose amendments took precedence in the event of a dispute. The problem was exacerbated by different areas of expertise, channel marketing responsibilities and the perceived low status of the task as “proofreading,” as opposed to a business sign-off.

The problems were further compounded by the different origins of the local office reviewers. There were two native-speaking European Spanish speakers; one Latin American Spanish speaker working largely with Spain; and a Latin American Spanish speaker based in the US office, who traveled regularly to South America on business.

For budgetary reasons, the company was obliged to use one version of Spanish, but neutral Spanish does not really exist. The problem was further aggravated by the fact that some differences were discovered in crucial hedge fund terminology between regions and the respective reviewers could not be brought to consensus. Since the vast majority of the literature was prepared for Spain, European Spanish took precedence. The US office was invariably left the most dissatisfied as they disliked Spanish originating from Spain, considering it to be “archaic.”

The conflicting feedback from different Spanish projects left the LSP struggling to find a middle ground, just as Scott Bass described in “Quality in the real world” in *Perspectives on Localization*: “Often, clients will request ‘international’ French or Spanish as the desired target language for a translation or localization project. By requesting the ‘international’ variety of a language, they hope to address multiple target markets with just one version of the translated material. While this makes budgetary sense, it poses a conundrum for the agency and translators.”

The LSP also regularly complained about having to weed out Latin American Spanish from the international Spanish TM after receipt of some local office revisions. The different approach to *you* in the plural between Spain and Latin America was a particular issue. In many ways, the problem reflects the differences between US and UK English. You may be aware of the differences, but it is instinctive to insert the version you are most familiar with. This proved to be the case for the Latin American speaker working with Spain.

The US office wanted a separate South American version, for which there was not always sufficient cost justification to win



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Job title:

Purpose of document:

Target audience:

Private Clients Media (specify publication)

Institutional Other (specify)

Intermediaries Internal (specify)

General

Translation target deadline: Approved copy target deadline:

Confidentiality level: Highly Confidential Confidential Normal

Source language: *Attach Word or PDF file with final, approved copy or draft copy for quote purposes

Target language(s):

1. English (a) UK (b) Ireland (c) US (d) Australia/NZ (e) Canada

(f) Other instructions:

2. German (a) Germany (b) Switzerland (c) Austria (d) Belgium

(e) Other instructions:

3. French (a) France (b) Switzerland (c) Belgium (d) Canada

(e) Other instructions:

4. Spanish (a) Spain (Castilian) (b) US

(c) Latin America: (i) Argentina (ii) Mexico (iii) Uruguay

(iv) Chile (v) Colombia (vi) Peru

(vii) Venezuela

(viii) Other instructions:

Figure 1: Sample section from internal, interactive translation briefing form.

senior management support. All too often translations become embroiled in political issues that have nothing to do with the words on the page. My personal experience with a number of multinationals confirms the veracity of the following statement by Bass: "in-country review is fraught with potential entanglements, especially when the reviewer has a hidden agenda."

Translation turmoil

The situation with the US office reached a critical point with the South American Spanish translation of a marketing leaflet. The reviewer was unhappy with the translation and independently commissioned another LSP to provide a replacement. This latter translation was then sent to the London office for in-house publishing. The head of the London marketing department requested a review of both translations by the original LSP, and the response resulted in serious questions about translation briefing and the type or flavor of Spanish required.

The US office's preferred translation was found to contain grammatical and

typographical errors. The style and tone were criticized as not being appropriate for the organization's sophisticated and discerning clients – this being the standard target audience brief provided to the LSPs. The analysis suggested that the translation was more appropriate for a US Spanish-speaking target audience than the Latin American target audience that had been requested in the original

brief. So the asset management company was now faced with trying to create one international Spanish version from three different versions of Spanish: European, Latin American and US Spanish.

While perhaps it was to be expected that the translation agency would want to defend its translation, the tone of the original LSP's rebuttal to the US office's dissatisfaction was striking and persuasive. It should be remembered, however, that ownership by the local office's sales team can be as important to the successful employment of marketing materials as considerations of the end-user. If dissatisfied, the offending materials may simply be abandoned in a corner of the office collecting dust and may never reach the intended target audience. Unused materials are a waste of corporate money. So while the LSP had a point about the errors, this did not invalidate the views of the local office by any means. Experienced financial translator Chris Durban observes in "Demanding clients state their case: Comments on the client round table at La Rochelle" in *The Journal of Specialised Translation* that some translators have "a flawed appreciation of the importance of ensuring that the translated text – the customer's 'baby' – remain[s] something that he or she can identify with. All too often translators dismiss client comments lock, stock and barrel if the customer has been naïve enough to insert a spelling or grammatical error along with other changes. In doing so, they have missed the point."

Questions were asked about the Spanish-speaking target audience. Prior to November 2006, one Spanish version was supposed to suit all. European Spanish was often used even if materials were

Region Focus

Term	LatAm (Mexican)	Comment applicable to Argentina	Comment
trading (of strategy)	Inversión		Not negociación – US office preference.
allocation	asignación/distribución	asignación/distribución	Depends on context.
Board of Directors	Consejo directivo/Junta directiva	directorio	Junta is not a good word in Argentina. Advise to avoid.
commodities	materias primas	materias primas	Productos básicos was translator's recommendation. Technical people in LatAm generally say commodities.
due diligence	diligencia debida	diligencia debida	Some countries leave the term in English.
equity	renta variable	renta variable	
hedge funds	fondos de fondos hedge	fondos de fondos hedge	Translator recommended to keep in English, but US office prefers to translate.
interest rates	tasas de interés	tasas de interés	
investor	inversionista	inversor	In Argentina, it would be inversor, but all other Latin American countries use inversionista.
IT Development	Informática	Informática	New term added by US Office.
leverage	apalancamiento	apalancamiento	
manager	gestor/administrador	gestor/administrador	The most accurate technical term is gestor, especially because this brochure is directed at experts, not at individual investors.
Multi-Manager (team)	equipo multi-gerente	equipo multi-gerente	US office preferred translation. Do not put English in brackets after Spanish translation.
multi-strategy	estrategia multi-gerente	estrategia multi-gerente	
performance	retorno	retorno	rentabilidad, evolución, resultado and even desempeño in Latin America.
redeem	reembolsar	rescatar	Reembolsar seems to be more neutral for LatAm Spanish.
return	rentabilidad	rentabilidad	
Sharpe ratio	razón de Sharpe	razón/índice de Sharpe	Not ratio de Sharpe.
yield	retorno	retorno	US office preference.

Figure 2: Final, agreed terminology list for Latin America (LatAm). Blue text shows discussion points between the US office and the terminologist.

explicitly for the South American market. Now, it seemed that there might be a need for even more different flavors of Spanish. The translation was intended for Argentina, although this important detail did not form part of the original brief. In a very unusual step to resolve the conflict, an important Argentinean client was asked to choose between the two translations and chose the original LSP's work, albeit with a few amendments from the second version. This solved the immediate project problem, but the overall Spanish issue remained unresolved.

A new approach

For the next Latin American Spanish translation, there were new translation procedures in place. Key to these new processes was the development of the company's own in-house translation briefing and feedback forms. Many "internal clients" within the marketing department who had been placing requests for Spanish translations were blissfully unaware of the different market terminology. By requesting information with tick boxes in an easily completed, on-screen form, the managers were forced to reflect upon the subject. The overkill on detail is a deliberate educational ploy, as well as an attempt to get more complete market information (Figure 1).

The next project was a financial brochure with its target audience split between Central and South American countries. So from trying to force one version out of three different versions of Spanish, the company now discovered further multiplication in Spanish versions. The breakdown of the target audience provided by the US office on the form was as follows: 40% in Mexico; 30% divided between Argentina and Uruguay; 20% in Chile; and 10% in Colombia.

Some key financial terminology differs between these countries. For example, the term *investor* becomes *inversionista* in Mexico and *inversor* in Argentina. As you can imagine, this word could occur frequently within the same document and often within several lines of the previous example. The frequency of the same "wrong" term can throw the appreciation of an otherwise good quality translation. The percentage weightings at least provided a means to decide on which term to prefer. Thus, for this particular brochure, the weighting was toward Mexican terminology in the event of a conflict. This

may still not appear ideal perhaps, particularly for Argentina, but it is the best option when a company can only budget for one set of printed materials based on the current business case.

As a result of the detailed target information given to the LSP, the translators were able to advise on the best way forward. Indeed, the LSP was positive and proactive in its proposals. In another unusual approach, it provided significant background reassurance for the benefit of the US office on its selection of translator. The chosen translator was an experienced financial terminologist with published glossaries on accounting, tax and business terminology with the benefits of both a commercial and academic background in both South America and the United States. She translated the leaflet and submitted a list of terminology for review. She assessed and tried to resolve where there could be a conflict between different countries (Figure 2). The US reviewer was impressed by the professionalism of the approach and reassured by the translator's knowledge of the market. The brochure was signed off with amendments for the glossary and positive feedback for the future. The same translation team was demanded for the next South American project. This clearly demonstrates the best practices and possibilities with improved communication between the client and LSP.

Since 2006, the dust has settled considerably. For most projects, there is still a requirement for only one version of Spanish. Regular monthly market commentaries are translated into Latin American Spanish and there are still compromises. There are established procedures for briefing and constructive feedback with forms and clearer appointment of reviewers. Today, such is the confidence of the US office in the translation team that when the office is offered a chance to review the translations, the offer is invariably declined to concentrate on important sales activities.

This trust was undoubtedly hard to earn after successive, unresolved problems. However, this anecdote clearly demonstrates how an LSP's proactive response can turn a complaint into an opportunity for improved communication and understanding. The improved client-LSP partnership was able to achieve the best quality translation for the budget available. The leaflet was even updated and reprinted using the same team at a later date. **M**



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