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PREPARE FOR ENGAGEMENT!

ISSUE #25 | THE ENGAGEMENT ISSUE | MARCH 2017

Beyond The Boardroom: The Evolution Of Social In The Enterprise

Renew Your Brand Strategy: CX Advice from Leading Brands

5 Steps To Launch Your Social Employee Marketing Channel

The Future Of Marketing And Engagement Is Influential

Conducting A Rapid Ideation Workshop

...and much more inside.

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...It's Not Rocket Science.

Featured In This Issue:

From The Editor

Prepare for engagement…

… with 15 interesting | captivating | fascinating | intriguing (you chose the synonym) pieces from some of your favoutrite Brand Quarterly contributors, and a few new recruits.

Whether you're focused on engaging your customers, your team, your stakeholders, or your influencers - on and offline - we've got you covered. Social business, ideation workshops, improving the customer experience, leveraging web analytics for engagement, and engaging your entire organisation in the marketing function - you'll find it here.

As co-editor, I'd like to welcome you to this issue on Fiona's behalf as she takes a little time away with a new addition to the family. I'd also like to welcome our newest Brand Benefactor to the team, Lionbridge; the world's #1 globalisation company, delivering industry-leading translation and localisation, digital marketing, global content management, and application testing services to the world's top brands. It's through their support that we can continue to provide Brand Quarterly as an industry resource, free of charge - with new developments, improvements, and plenty more great content. A huge THANK YOU to the team at Lionbridge, and I encourage you to check them out to see how they may be able to support your business as well.

Looking ahead, we are now accepting submissions for the 'Strategy' issue, so, if you'd love the opportunity to be featured either in the magazine or as one of our weekly thought pieces, head over to our contributor's page for more details - and get writing :)

Enjoy this issue, and I'll see you again in June.

Cheers,

Andrew

As the publishers of Brand Quarterly, we take every care in the production of each issue. We are however, not liable for any editorial error, omission, mistake or typographical error. The views expressed are those of the contributors and not necessarily those of their respective companies or the publisher.

The Future Of Marketing And Engagement Is Influential

Lee Odden

Planning for 2017, many marketers have placed a high priority on customer experience and the content that helps make the best customer engagement happen.

At the same time, companies are challenged to create a variety of engaging content on a consistent basis coupled with the fact that consumers are less trusting of brand communications and advertising.

There are many suggested solutions to the challenges of creating consistent, high-quality experiences for customers that range from integrated technology platforms to cognitive marketing applications incorporating big data, artificial intelligence and machine learning. This is one of the key roles that a savvy agency can play for brands: to help develop a digital marketing strategy and corresponding technologies needed.

It's tempting to focus singularly on technology for solving marketing problems, but the solution to better customer experience and engagement is more about being human than the latest martech solution. In particular, understanding how relationships, influence, and content deliver more relevant and engaging experiences is essential for differentiation and driving better ROI.

This is where the next evolution of influencer marketing comes in: Influence 2.0.

The field of influencer marketing has grown fast, and while some approach the practice transactionally, not unlike advertising, an increasing number of brands are focusing on the long term value of relationships with influencers and the kind of content collaboration that inspires better engagement across the customer lifecycle.

A more human approach to marketing means attention to empathy and a focus on customer experience. Influencers are credible, trusted individuals with active networks and the value exchange of their engagement with the community is where influence originates.

Brands can tap into that influence to expand brand reach, create better customer engagement and even improve specific marketing goals like lead generation and increased sales conversions.

According to Influence 2.0, a new research report by Brian Solis of Altimeter Group in association with Traackr and TopRank Marketing, 63% of marketers want to improve customer satisfaction through the use of influencer marketing. "The opportunity for consumer engagement spans the entire journey and influencers can play an important role in each moment of truth", says Solis.
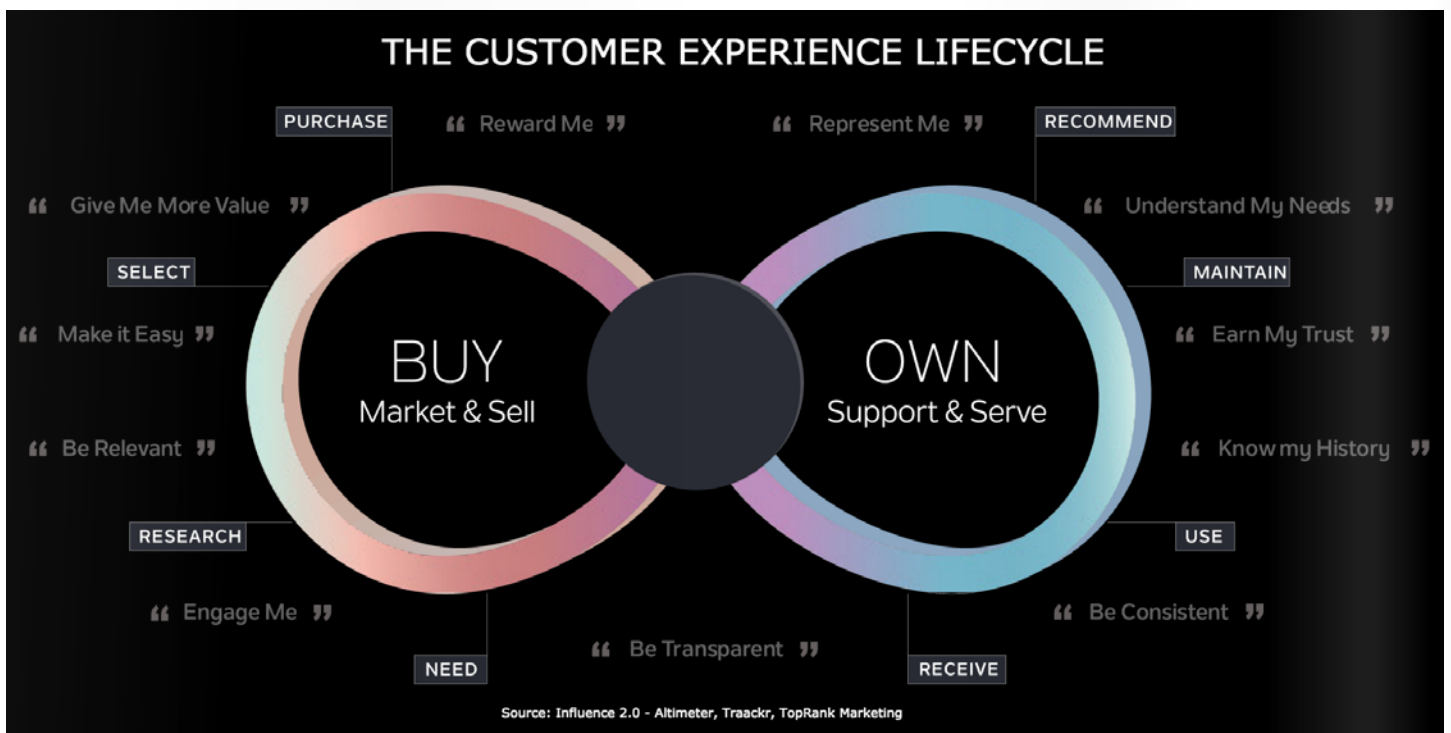
THE CUSTOMER EXPERIENCE LIFECYCLE

Source: Influence 2.0 - Altimeter, Traackr, TopRank Marketing

Modern marketers understand that customers don't move linearly through decisions anymore. Eloqua helped visualize the new way to view this new customer journey as an infinity loop, illustrating important moments of truth and opportunities for customer engagement.

Modern marketers understand that customers don't move linearly through decisions anymore

By plotting the infinity loops across your own customer touch points during the customer journey, you can set the stage for a new model of customer experience management.

To connect with customers in a more meaningful way, it is more important than ever for companies to identify, qualify and develop relationships with relevant influencers of all types to collaborate, co-create and instigate advocacy. I can think of no better focus for these collaborations than through content.

THE CROSS-FUNCTIONAL INFLUENCE MODEL
Influencer programs throughout the organization

Mentions / Impressions · Sales / Clicks · Public Relations · Performance Mktg · Journalists · Affiliates · Traffic / New Recruits · Human Resources · Employees · Influencers · Thought Leaders · Marketing · Share of Voice / Leads · Community Management · Advocates · Customers · Customer Success · Mentions / Engagement · Referrals / Case Studies
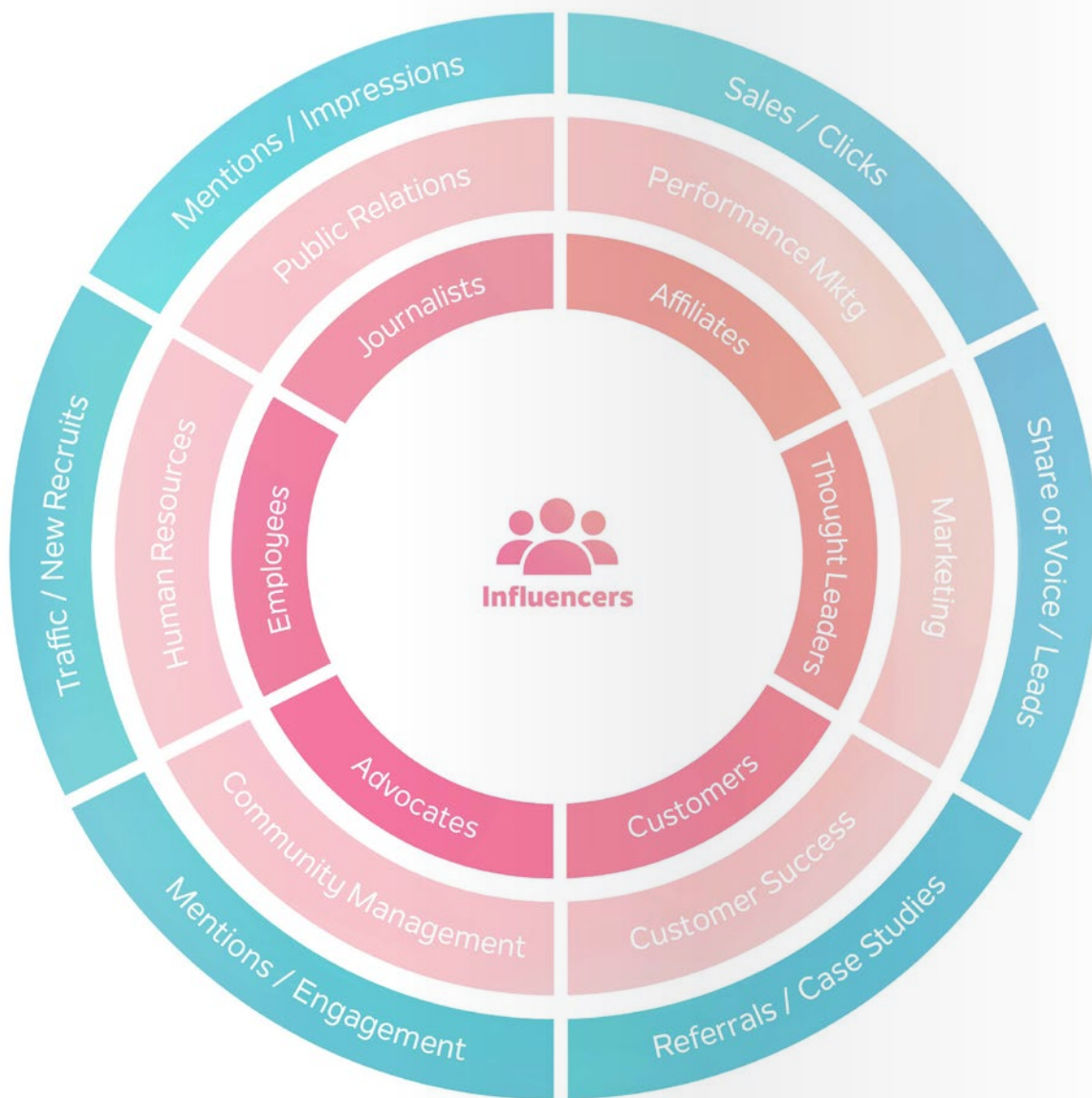
● Influencer Type   ● Org Department   ● Success Measures

In order for marketers to maximize customer experience and business growth opportunities with a more modern approach to influence, here are five key insights:

Maturity

43% of marketers are experimenting with influencer marketing.

It is still early for influencer marketing for many companies, but given the relationship focus on the best influencer marketing programs, there's plenty of opportunity. Only 28% of marketers are focused on campaigns, and just 24% are implementing ongoing programs. As brands mature their approach, skills and relationships with influencers, companies implementing always on, ongoing influencer marketing programs will increase substantially.

Impact

80% of marketers rate content marketing as most impacted by influencer marketing.

In discussions about the ROI of brand relationships with influencers, there's simply no better match than content collaboration for creating measurable, impactful business outcomes. Influence 2.0 supports this with content being rated highest in impact from influencer marketing along with social media marketing and media relations.

Goals

67% of marketers want to drive lead generation through the use of influencer marketing.

Beyond improving brand advocacy, awareness and reaching new audiences, the majority of marketers are also focused on improving leads and sales conversion (74%)

through working with industry influencers. Influence plays a role throughout the customer lifecycle and in all relationship-driven brand communications.

Digital Transformation

34% of marketers report that CMOs are leading marketing digital transformation initiatives.

Companies are prioritizing investments in both customer and employee experience. With CMOs leading the way, it opens many doors for innovation in the humanization of technology. As Solis says in the report, "... the more human marketing becomes, the more digital transformation can also become human."

Integration

57% of marketers say influencer marketing will be integrated into all marketing activities in the next three years.

While only 5% of marketers currently rate the maturity of their influencer marketing program as integrated, the forward-looking optimism for the next three years towards integration should be a strong signal for the direction that influencer marketing is going. 30% of marketers say Influencer marketing will become a primary area of digital marketing investment in the next three years.

Building relationships with influencers through content collaboration delivers mutual value for brands and participating influencers as well as the community that will consume the content. As it is tempting to use technology to solve marketing problems, it has also been tempting for brands to take a transactional and advertising focused approach to working with influencers.

Building relationships with influencers through content collaboration delivers mutual value

Successful marketers at major brands do not agree with a transactional approach to influencer relationships:

"Focus on a long-term approach rooted in a two-way dialogue", says Amanda Duncan of Microsoft, "It's often the phases between campaigns and events that allow you to have in-depth conversations, get valuable feedback and really gain a deeper understanding around what matters to your influencers. Investing this time and valuable resources builds credibility. This credibility and trust with an influencer is key to ongoing success."

While a relationship based focus takes time, it's a worthwhile investment according to Dr. Konstanze Alex-Brown of Dell, "Long-term, trust based relationships with shared value creation take time and effort to build and investment to sustain. While results will be measured digitally in reach, impressions, online engagement, there is no shortcut for getting there."

Moving beyond a singular focus on the brand, value creation can extend to all involved. "When you treat your influencers like clients, as SAP does, it leaves people with a positive feeling, and they are going to want to engage with you time and time again" says Amisha Gandhi of SAP. "When the relationship is mutually beneficial, both parties are going to get the best results out of the engagement with the brand."

Too often, brands and agencies approach influencer marketing as a short term transaction without realizing there is much more to be gained for everyone involved. The concept of Influence 2.0 is to help marketers understand an approach to influencer marketing that aligns with the objectives of business, influencers, and customers simultaneously.

By understanding customers, designing programs that matter to them, and then using platforms to partner with trusted influencers, brands can steer buyer impressions, decisions, and behaviors in more useful, productive, and mutually beneficial ways. Make no mistake, the future of marketing and customer engagement involves technology, but to be successful in the short and long term, marketers need to understand the multiplying effect of relationships, influence and content.

Marketers need to understand the multiplying effect of relationships, influence and content

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Lee Odden

CEO | TopRank Marketing

Lee Odden is a marketing strategist, author, speaker and CEO of TopRank Marketing, a digital marketing agency serving some of the top B2B and B2C brands in the world with an integrated mix of content, search, social, influencer marketing and advertising. Cited by the Wall Street Journal, The Economist and Forbes for his marketing expertise, Lee has evangelized a customer-centric approach to marketing at over 200 events in 16 different countries and through an award winning blog at toprankblog.com.

www.toprankmarketing.com

How To Soar Higher
With Marketing Ops

Laura Patterson

Increased choices, channels, and competitive proliferation have changed the way companies and customers engage with each other. As a result, many organizations are designing new approaches in order to be able to pilot themselves successfully in this modern environment.

PwC's Global CEO Survey found 72% of organizations have, or are planning to have, significant change programs to capitalize on global trends and address customer growth and retention. It turns out, however, that only about a third of the CEOs who participated in this study believe that their Marketing organizations are prepared to respond to these changes.

Rising expectations from CEOs for Marketing to help navigate the potential turbulence and generate faster growth has required CMOs to transform their Marketing organizations into more adaptive entities.

Those who are doing so most successfully are employing agile processes to improve their speed, predictability, and accountability while satisfying customer needs, enhancing customer experience, solving business problems, and continuously creating value.

How Do You Become Agile In The World of Marketing?

Workfront asserts that agile "is a tactical marketing approach in which teams identify and focus their collective efforts on high value projects, complete those projects cooperatively, measure their impact, and then continuously and incrementally improve the results over time."

The powerhouse of agile is the iterative "inspect-and-adapt" approach to development that works to significantly reduce both costs and time to market. It does this by encouraging experimentation to gain frequent and measurable "feedback loops" that can be used to quickly maneuver in accordance with changing market conditions.

The powerhouse of agile is the iterative "inspect-and-adapt" approach to development

However, for your Marketing to really take flight and last the distance all the functions of Marketing must travel and maneuver together in a disciplined, synchronized, predetermined manner. This type of formation flying requires processes, skills, and capabilities to capture, manage, and analyze data, derive insights, evaluate performance, and then report and

share results across teams. Marketing Operations (Marketing Ops) serves as the CMO's wingman and acts as the agile conduit between Marketing, Sales, Finance, and the executive team.

Marketing Ops develops and implements the processes and systems necessary for Marketing to power business results. It does this by facilitating Marketing's use of data, analytics, process, and technology to make strategic decisions related to customers, the market and products, and course corrections.

Soar To Best-In-Class Status With Agile Marketing Ops

In the beginning, Marketing Ops emerged due to the need for a "more transparent, efficient, and accountable view of Marketing". Since then, with the proliferation of MarTech and the increased pressure from the C-Suite, Marketing Ops has emerged as the cockpit through which Marketing proves its value to the business.

For the last 16 years, VisionEdge Marketing has measured the changing role of Marketing Ops with our annual MPM Benchmark study. Through this study, we have learned that what separates the Marketing Ops of the Best-in-Class (BIC) Marketing organizations is their focus on alignment, accountability and agility. In these organizations, the Marketing Ops role has expanded beyond MarTech or program implementation.

These BIC Marketing Ops teams activate Marketing and serve as the control center for the organization by developing these five critical traits:

- Rapid decision-making and execution
- A high-performance culture
- Ability to access the right information at the right time
- Accountability and credibility
- Teams that can flex

The Marketing Ops role has expanded beyond MarTech or program implementation

The research reveals that the skills and processes of Marketing Ops among high performing Marketing organizations now include the following (in no particular order):

- Performance measurement and reporting
- Campaign analysis and reporting
- Technology, automation, and pipeline management
- Budgeting and planning as well as financial governance and reporting
- Data management
- Workflow process development and documentation
- Project management
- Strategic planning
- Organization benchmarking and assessments
- Customer, market, competitive intelligence, research, and insights
- Analytics and predictive modeling
- Talent and skills development

With these processes and skills, Marketing Ops pilots the planning, performance management, resource management, tools, and workflow required to support the entire customer experience. As the role of Marketing Ops continues to expand, where can Marketing Ops best serve Marketing and the overall business?

Marketing As A Center Of Excellence With Marketing Ops

Businesses in pursuit of agility and excellence create and implement Centers of Excellence (CoEs). A Center of Excellence refers to a team that provides leadership, fosters best practices, facilitates research, and enhances the skills needed to drive business results.

If we think in these terms, Marketing Ops emerges as the best steward for a Marketing organization steering itself in the direction of becoming a CoE. Yet, the research shows that fewer than 20% of marketers leverage best practices when it comes to engaging Marketing Ops.

Fewer than 20% of marketers leverage best practices when it comes to engaging Marketing Ops

Are you wondering whether your Marketing Ops is among the 20%? Assess how well your Marketing Ops excels at each of these five critical competencies:

1. **Organizational Alignment And Value:** The degree to which your marketing ops functions ensure Marketing is aligned with the organization's initiatives.
2. **Performance Management:** The extent to which your Marketing Ops function assists with establishing performance targets and reporting on results.
3. **Data And Processes:** The capabilities of your Marketing Ops team to assess and build operational processes, data management processes, and measurement processes.
4. **Systems And Tools:** How well your Marketing Ops function facilitates the infrastructure (the data, systems, and tools) that the Marketing organization needs.
5. **Marketing Skills And Proficiency:** How well your Marketing Ops anticipates and builds the capabilities related to market and customer analysis, planning, program development, execution, and reporting.

These capabilities provide Marketing organizations the wind needed to lift the organization toward its intended trajectory path. You can start by leveraging Marketing Operations as a means to transforming Marketing into a CoE with these five areas:

1. **Financial Management:** Enable Marketing to adjust plans as needed over time and to see the impact of dialing spending up and down.

2. **Plan Development and Execution Alignment:** Avoid developing your annual plan in a silo. Marketing Ops should bring the work of those who plan and execute programs and those who run the business together to ensure direct line-of-sight and metrics selection.

3. **Workflow And Process Management:** Gone are ad hoc communication events that lead to inconsistent results, frequent re-work, and last minute adjustments. Marketing Ops defines the best practices for workflows, measurement, reporting, and data management between Marketing managers' activities and external service providers.

4. **Asset Management:** Marketing Ops implements systems to manage all of the organization's digital assets that are often scattered across several media silos in a secure asset library with attribute tracking, graphical views, and version control.

5. **Metrics And Report Management:** Simply collecting data is of limited value. Without the right metrics and actionable Marketing dashboards, it is difficult to make course adjustments or assess what works and what doesn't.

By enhancing the role of your Marketing Ops function, you can help the entire organization take flight and soar past the competition by making better data-driven, customer-centric decisions.

> **By enhancing the role of your Marketing Ops function, you can help the entire organization take flight**

When this change occurs, Marketing becomes more effective, more credible, and more influential in the business. Enable your Marketing Ops team to control the important levers that activate your Marketing organization so you can generate and demonstrate Marketing's value and serve as a Center of Excellence. Are you ready to take off with this new approach?

Laura Patterson

President | VisionEdge Marketing

Laura Patterson is known for her practical, no-nonsense approach to proving and improving the value of B2B marketing. Inventive and engaging, Laura quickly gets to the heart of the matter to provide actionable recommendations and solutions. Because her 20-year career began in sales and now spans customer relationship management and marketing, her recommendations are always cross-functional friendly. An early pioneer on the science side of marketing, Laura is recognized as one of the leading authorities in marketing measurement and performance, marketing operations, and marketing data and analytics.

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Beyond The Boardroom:
The Evolution Of Social
In The Enterprise

Will McInnes

I believe in the importance of leveraging social data to impact your organisation's marketing efforts. In order to prove to other C-levels just how useful social data can be, a chief marketing officer (CMO) needs to be data-driven, regularly gathering data from social platforms and converting it into actionable insights.

The next generation of social in the enterprise is here, blending social data with other business and third-party data - cross-pollinating for richer insight. With this in mind, we're hedging our bets on a new power position within the enterprise that will drive home that last point: the social consumer and market insights (CMI) professional.

It's still critical to use social data for marketing efforts; to track campaigns, check in on brand health, and uncover new audiences, to name a few specific examples. In fact, it's such a successful tactic that as business needs evolve, the added value of sharing insight from social data across other departments becomes more obvious.

Social CMI derived from the work of market research and consumer insights teams are designed to support every team in the enterprise - including customer service, product development, human resources and other areas beyond marketing. The traditional practice of centralising the role of social monitoring within one department - usually marketing - has progressed.

The social CMI professional is pioneering advanced customer journey propositions that don't just meet the needs of prospective customers, but exceed and anticipate them as well. The insights gleaned by the social CMI professional go considerably deeper than traditional monitoring for marketing.

The social CMI professional is pioneering advanced customer journey propositions

These insights from advanced data analytics are revelatory breakthroughs, not just minor findings affecting one department. This new data is working in tandem with the conventional, and frankly siloed, methods of hunting for and gathering information about consumers - including passive social listening, traditional surveys and focus groups.

The social CMI professional is responsible for taking a 360-degree approach to collecting this data and more, then blending it, offering a more holistic look at the Voice of the

Customer. It doesn't stop with one or two sets of data. Nuanced and highly-curated consumer market insights extraction can be mined by intelligently analysing blended data from a brand's customer-relationship management (CRM) software, in-store sales, search data, web traffic, weather data, social data and so much more. It's all about identifying your business objectives, your customer needs, and using the right blend of data to find real actionable insights that can lead to real business results.

Today's market research directors and VPs of consumer insights are so much more than their titles. They need to be social CMI professionals because they have important responsibilities - it's an ambitious role; high-level and demanding, with the potential for strong business impact. Reaching far outside the walls of marketing.

The use of social data for collecting consumer insights unearths the raw Voice of the Customer, providing organisations with a deeper understanding of the market from a holistic level.

The wealth of unsolicited, unfiltered conversations reveals not only which brands and products consumers and communities are talking about, but can also uncover their other interests and passions, demographics like location and profession, social metrics and sentiment data that can be used to unlock an overview of almost any topic.

The use of social data for collecting consumer insights unearths the raw Voice of the Customer

Long gone are the days of assumption and guesswork. The power is in the data, and the data is an incredibly affordable and easy method that's just within our reach.

When you look at both "traditional" market research methods and "new," there are some important considerations for marketers:

- Social data empowers businesses to be nimble and smart; the continuous nature of social media and the flexibility social listening and analytics offers, allows brands to identify trends and jump on opportunities before the competition;

- Surveys are critical, but they aren't enough; consumer insights and marketing teams are *blending* traditional market research data with social data to confirm and assess campaign effectiveness, brand reputation, and more;

- Social CMI reaches far beyond the marketing and consumer insights teams; from investor relations, employee influencer activation, and even product development.

Social consumer and market insights offer value to many areas across the enterprise. It's not just another marketing "angle", believe me. Within product research and development, social data around consumers' conversations can inform opportunities for product innovation, alert stakeholders about service issues, and offer a direct line into the feature updates consumers want and need.

Social consumer and market insights offer value to many areas across the enterprise

The area of market research that social CMI is applied to can be incredibly niche. Social data is key for researchers to unlock rich insights quickly without having to conduct a survey or contact consumers directly.

It's cost-effective and directly taps into the psyche of the consumer, helping brands embrace the necessity of truly understanding their customers and prospective users on an individual and complete level.

A successful social CMI professional must be influential across all business units. Whether your title is market research director or VP of consumer insights, it's high time your organisation recognises your role as instrumental to flagship initiatives with a proven track-record of impact on business.

A successful social CMI professional must be influential across all business units

At the end of the day, the social CMI professional equips organisations with insights that allow functions across the business drive better results and meet market needs more intelligently.

You hold the social CMI power.

Will McInnes

CMO | Brandwatch

Brandwatch appointed Will McInnes as the company's first Global Chief Marketing Officer in October 2013. Previously, Will had been a partner and customer of Brandwatch as Managing Director at social consultancy NixonMcInnes, consulting global brands such as BBC, Cisco, Barclays and World Wildlife Fund on social and digital transformation programmes. In 2012 McInnes' book 'Culture Shock – a handbook for 21st century business' was published by Wiley. Will is also curator for Meaning conference, an annual gathering for people who believe in better business. In 2008 Will founded cross-industry working group MeasurementCamp, bringing together industry practitioners to collaborate.

www.brandwatch.com

It's up to us in Marketing
to lead with positivity.
Even if someone is negative,
turn it into a positive

BPOSITV: Positively Engaging Your Customers Every Day

Lynne Jarman-Johnson

Engagement.

When we hear the word, we may think of a young man getting down on his knee and asking his true love for her hand in marriage.

Or, we may think about our own engagement and the joy we felt at that one moment in time.

Could it be we think of the buzzword in Marketing, and we lie awake at night wondering how we will engage our audiences with digital delights?

I sure hope we think of true love.

Alas, we are all marketers at heart, and our minds do not turn off the 24/7 faucet that brings us ideas and fuels our passion to engage our audiences.

How do we engage online and offline to help us marry our customers to our service? I'm going to share with you a story about social service. It's not social networking; it's not social media; it's social service. Social service engages members in a way that is everlasting. Credit Unions serve members. In retail and business, consider them customers.

Social service engages members in a way that is everlasting

Consumers Credit Union has set up a social media team and a social service team.

- Our *social media team* works on creating content and sending the content to our members through the various channels we use to network.
- Our *social service team* works on listening and responding to members' needs and community questions.
- Our *social media team* is made up of marketing gurus, who know the ins/outs of our chosen networks.
- Our *social service team* is made up of customer service gurus, who know the ins/outs of our back-end systems and can communicate instantly with our members 24/7 on service needs.

We have set up our social service team to respond as fast as possible to members and potential members. We work in the financial industry; so when a member has a service need it usually involves their money. There is nothing more personal than that. It's up to us to take the service issues seriously and personally.

Let me give you an example:

A member is in Sweden traveling abroad. The member forgot to alert us they were traveling. It was overnight in the United States when they were checking into their hotel. They were told their card was declined. We have a standard fraud stop if an overseas transaction takes place and there are not notes in the member's file. Our member didn't have access to voice call at the time, so they messaged us on Facebook to find out if anyone was available to help. Within 3 minutes they received a response.

We immediately asked them to connect to Messenger, so their information wasn't sent over public Facebook. We asked for a phone number to contact them and were given the front desk of the hotel. We called our member and were able to securely learn their identity and help them get their debit card working again.

Consumers Credit Union is not the first company to set up social service teams to help engage members. However, we are very proud of our team, and the response from members has been amazing. Why? Because we listen.

I believe Marketing, in its most intimate form, is a conversation. You cannot have a conversation without listening and responding to your members who connect with you.

Marketing, in its most intimate form, is a conversation

How do we succeed?

1. We set up alert tools on our smartphones when a member has a need and reaches out in social media.

2. We respond quickly.

3. We are considerate and professional at all times.

4. We have strict guidelines.

5. Our guidelines are transparent both internally and externally:
   - No vulgarity
   - No name calling (and no first/last names)
   - No account information
   - No rudeness
   - Yes be kind
   - Yes ask for help
   - Yes care about others
   - Yes put a smile in your voice and your tone online

6. We engage with members offline as much as possible (What is the best way to reach you?)

The best part of the above six guidelines is that they are shared with our employees AND our members. We are very transparent about serving positively every day. We are just as transparent to our members to treat our team in the same positive manner.

It's so easy to get caught up in the snarkyness of social. It feels like there is so much more negative customer engagement in our world today. That is the point. It feels like it because there seem to be many more posts, sharing "I was treated poorly" than "Wow what a great experience I just had!"

It's up to us in Marketing to lead with positivity. Even if someone is negative, turn it into a positive. Responding quickly and listening are definite turning points in a negative conversation.

Say the following sentences out loud and end it in a negative manner, then a positive one:

Really? I'm traveling and...

Negative: I can't even check into my hotel

Positive: I can't believe someone was there to help me

Positive always wins.

Anyone who drives behind me sees my license plate. I've had it for years and I love the reactions I receive. (My count of people taking pics at a stop light is up to 37 - and their smile is so bright when their camera is removed from their face)

My license plate is BPOSITV.

In marketing, positive is the best form of engagement. A positive engagement makes people smile. As marketers, it's up to us to engage with our customers in a positive way, every moment of every day.

Positive is contagious and engages everyone.

Lynne Jarman-Johnson

Chief Marketing Officer | Consumers Credit Union

A proven leader in communications, Lynne is the CMO for Consumers Credit Union. She is also the Chief Coordinator of Family Dynamics (6 kids!) for the Johnson Bunch. A bold leader who brings passion and quality to all works and levels of an organization, Lynne also brings social communication expertise with knowledge of up to the minute technology / information systems for communication. Her "Wedding Cake" philosophy has changed the way marketing and data is served to members, audiences and communities. Lynne is ranked in the top 20 of 100 CMOs on Twitter and Forbes Social Media Influencers list. She has also been recognized as one of our '50 Marketing Thought Leaders Over 50'.

www.mojocmocmo.wordpress.com

How In-Store Video Helps Optimize Brand Engagement

Cynthia Johnson

Point-of-sale marketing tactics have historically been limited to basic placards displaying outdated graphics along with some small print pushing today's hot items.

Some marketers take it one step further and recommend pyramids of precipitously stacked products, which a child on a sugar rush inevitably topples.

Suffice it to say that for brand marketers, in-store advertising techniques have effectively stagnated, keeping brick-and-mortar sellers on the outside of the programmatic media revolution.

This is a concerning phenomenon for retailers, especially considering that 85% of consumers still prefer to complete their purchases in physical stores rather than online.

The bottom line is: effective in-store marketing is just as important as it ever was, and it's time to build momentum with customers by capitalizing on technology.

The bottom line is: effective in-store marketing is just as important as it ever was

Digitizing Brick-And-Mortar Environments

"Digital signage is a critical need," proclaims Jon Stine, the Global Director of Retail Sales at Intel. He continues, "Over the past five years, 65% to 70% of shopper journeys start online, while 88%… are transacted in the store."

Innovative brand marketers at the forefront of the in-store digital advertising revolution have already employed some successful tactics. For example, the retail giant REI adopted in-store kiosks that deliver web-based service, empowering customers to assist themselves with research, price comparisons and available inventory checks while freeing up floor associates, and therefore limiting labor costs.

Nike's London store installed interactive touchscreens to allow customers full access to further information about their products, successfully bringing in-store customers online.

Motivating brick-and-mortar customers to interact with a brand online, even if that interaction is limited to in-store kiosk or touch-pad, cultivates a more collaborative, responsive sales environment. It also aligns digital marketing efforts with in-store customer experiences.

But perhaps most significantly, this effort culls data from customers who would otherwise remain "undocumented." The information collected from in-store audience members can bolster brand marketing efforts, because the more insight available about customer needs, demographics and behaviors, the better a brand can segment, target and drive purchases. "The future… is about data-driven decision making," says Stine. "The retail leaders of tomorrow will be the companies that can acquire and analyze this data and do something with it."

The information collected from in-store audience members can bolster brand marketing efforts

What In-Store Video Can Accomplish

Onsite video screens allow retailers to strengthen their brand while mitigating the customer's discomfort of waiting in a queue.

Considering that the average brick-and-mortar shopper spends 20 minutes of dwell time in each store, and an average of eight minutes in the grocery checkout line, brand marketers should be considerably more motivated to capitalize on that captive audience.

Montreal-based infotainment company Impax Media is making an intriguing move to accomplish exactly that goal. Impax places 32-inch high-definition screens just above product displays in grocery checkout lanes, creating a dramatic, brand-focused

video wall across the entire front end of a supermarket. The individual retailer manages a percentage of the programming featured on the screen, which often includes a mix of quick meal ideas, cooking tips and "what's on sale today" spots.

Even more compelling is that this same technology performs double-duty - while broadcasting, it culls information from in-store customers, taking audience research into physical retail spaces. Using technology that tracks eye contact, a time counter is activated for each view.

Additionally, the software uses anonymous facial analysis to segment viewers by age and gender, skyrocketing the advertiser's audience intelligence.

Local Brand Optimization

Point-of-sale video is an especially strong channel for local brands, since proximity marketing can be utilized to its fullest potential.

Most retail customers do their shopping in their hometowns, and earning local exposure via video is a lot easier than trying to rank locally in the competitive search engine results pages. Since local television advertising can be cost-prohibitive, on-site branded video may offer the most bang for local media buyers' bucks.

Keep in mind, though, that attention is a more valuable metric than impressions for in-store video. Keeping a potential customer in front of branded content for several minutes is a feat that digital channels rarely achieve.

Attention is a more valuable metric than impressions for in-store video

The Revolution Has Begun

Burgeoning technology is allowing retail brand marketers inroads that they've been previously denied. Gone are the days of stacking cans of corn and hoping the precarious pyramid does its marketing job.

Point-of-sale video shows so much promise because it targets an audience that was previously not engaging via dedicated screens. It also aligns extremely well with brands' digital marketing efforts, further developing brands' abilities to gather actionable audience intelligence.

The tools are now in place.
Join the revolution.

Cynthia Johnson

Co-Founder | Ipseity Media

Cynthia Johnson is an entrepreneur, marketing professional, author and keynote speaker. She is Co-Founder at Ipseity Media, a personal brand development and management agency in LA, and co-founder at InsureHound, an InsurTech company. She is advisor to social good company, DIVONA, and nGage.social, an influencer advertising startup. Cynthia is on the Forbes Agency Council, and a member of the Young Entrepreneurs Council. she was listed as top social media people to follow by Inc. Magazine, top 50 marketers on SnapChat by Mashable, top 12 Female Entrepreneurs that Inspire by Darling Magazine, and top 20 people in SEO by Guardian. She is also a social media influencer.

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An Emotional Response To The Digital Age

Ana Andjelic

In the direct line that goes from knitting (circa 2006), to taking cooking classes, to puzzle assembling, to pottery-making, to board games, to flower arranging, to coloring for adults, we've amassed an impressive number of hobbies that have nothing to do with our Internet-driven lives.

In fact, they are the exact opposite of the Internet.

Success in life is now measured by the quality of our being, versus doing or having

Our craving for the pre-electricity lifestyle of simple pleasures, farm-to-table food, homemade meals, hand-woven items, comfort and contentment is a side-effect of lives that are too fast, too busy, too connected, and too global.

We don't have to go Amish to have it. As a reaction to the pervasiveness of technology, companies invested in slow making, wabi-sabi, and hygge - among other all-natural, organic, simple and humble creations dedicated to the lifestyle of being and not doing or having.

Seemingly overnight, wabi-sabi - the Japanese art of imperfection - emerged from the depths of the Far East's fifteenth century, straight into our living rooms. The most modern designs today, across home décor, fashion, or art, are wabi-sabi: raw, desolate and pared down. Forget about the showiness and opulence of the bygone era: humble spirituality is where things are at.

Blame the Internet. The endless reproducibility of the Internet culture has made us want something that's tangible, authentic, and hard to replicate.

Enter slow making, a trend that doesn't show any signs of slowing down. Even a precursory research into the term reveals no less than 14K Instagram posts labeled with #slowmade, with all sorts of handmade objects, food and clothing on display. Etsy is in overdrive. Not to mention the New Craftsmen, Lusitano1143, 1stDibs, Soane Britan and other companies that have been launched in the past couple of years to feed our obsession with wood-carved items, hand-woven blankets and glass canisters blown in a trunk of a tree.

We'd take anything imperfect, handmade, authentic, and hopefully hard to find. If it's made just for us, that's even better.

Our drive to slow down is now cherished as a lifestyle. It seems like a week can't pass by without another mention of hygge, literally

Our drive to slow down is now cherished as a lifestyle

meaning the art of cozyness in Danish. In addition to morose child-rape-and-murder dramas, Danes are not known for much else. That all changed with the onset of hygge, the invite-only activity of cuddling up at home with a selected group of friends, farm-to-table food, homemade mulled wine and as many candles as one can fit in without setting off the fire alarm.

Hygge took Northern Europe by storm, generating endless how-to manuals and even making it among the top 3 most used terms of 2016 (the other two being Brexit and Trumpism), according to New York Times. If the Internet is too accessible, our hygge nights are not.

Herein lies the new non-digital divide.

We may think that cozying up is our response to speed, uncertainty and the sheer vastness of the hyper-connected world around us. We may think that wanting to recognize the hidden, the unconventional, the humble and the simple is a reaction to the mass commodification of everything from culture, fashion and art to political protest and social unrest to our own wellness and spirituality. We also may think that it is our resistance to digitalization of our lives to the point that it doesn't make sense to use the term "digital" anymore. We wouldn't be wrong, but we would miss a much bigger point.

Slow making, hygge, and wabi-sabi are indeed reflections of our emotional repertoire developed as a reaction to the zeros and ones of the Internet. But they are also aspirations to be acquired.

Today we strive to have the simplest of pleasures, like comfort, rest, and contentment with the same fervor we strived to accumulate material possessions or

professional achievements. Success in life is now measured by the quality of our being, versus doing or having.

A lifestyle of simplicity, modesty, and humility is the new status symbol. Most of us hardly can or want to do things without technology, but being inaccessible, disconnected and able to unplug is reserved only to those who can afford to use technology at will and not as a necessity.

It's ironic, that the role of technology has become to provide us with life with no obvious technological presence. That's the ultimate hidden beauty of a deliberate, wabi-sabi, fireplace-lit lifestyle.

Technology transformed how we work, love, and play. It made everything accessible, transparent, and easily available. It compressed space and time and allowed someone in Dubai, Tashkent or Minnesota to buy the same things, read the same content, and enjoy the same entertainment.

It turns out; we don't actually want that. We want things that no one else has. We want them to be imperfect just so. And we don't want to share them with anybody. We may call it cozying up, but please.

Ana Andjelic

SVP, Global Strategy Director | Havas LuxHub

Ana is strategist, writer and doctor of sociology. She works as SVP, Global Strategy Director at Havas LuxHub, where she guides fashion, luxury and lifestyle companies in adapting to the digital economy. Ana was recognized as one of Luxury Women to Watch 2016 and one the top 10 digital strategists in the world by the Guardian. Her writing appears in the leading industry publications, and she often speaks at global technology, media, and fashion conferences. You can learn more about her work at her website below and follow her on Twitter at @andjelicaaa.

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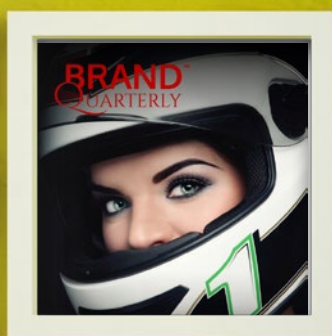
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Renew Your Brand Strategy: Customer Experience Advice From Leading Brands

Andrew Stothert

A few months back, I chaired the Customer Experience Exchange Europe event in Brussels - speaking on stage with some of the big boys in the industry. Brands that are currently ticking all the right boxes with their customer experience strategy - Barclays, Coca Cola, Forrester... the list goes on.

It was an insightful event, which uncovered a series of major macro themes. Trends and insights that ultimately outline how brands can plan and execute aligned customer experiences, and delight customers.

One thing is clear. We're in an era where customers play a definitive role in the success of a brand.

But just how we deliver these seamless experiences - that meet and fulfill our customers' wants, needs and expectations - is less obvious.

Whether we're CMOs, Brand Strategists, Customer Experience Professionals, or business people alike, there is one key question on everyone's lips...

How can we develop and action an irresistible customer experience, that aligns with our brand's vision and values, while still meeting the demands of customers?

While the answer is not black and white, the question sparks excitement. Because, those brands who can figure out the answer and deliver the necessary experience at each and every touchpoint, are going to be able to differentiate themselves and lead the way in this new era.

And what business doesn't want that?

So let's take a closer look at some of the fast-emerging customer experience trends that world-leading brands are spearheading.

A Journey To The New You

If you're not using customer experience as a core business transformation tool, it's going to be a difficult slog if you want to compete with, and differentiate yourself from, the competition.

Brands must align their customer experiences closely with their strategy, vision and promise if they want to transform their business and adapt in this brave new world.

And while investing in customer service is an intelligent step towards this, it's also a step every other business is taking too. Improving just customer service means making your brand just as good as everyone else.

Improving just customer service means making your brand just as good as everyone else

To truly differentiate yourself and lead the way in customer experience improvement, you need to harness the myriad of data and insights available and use it to innovate the next generation of brand-customer interaction.

And it all starts with two key practices:

- Observe the behaviour of real customers in the digital world
- Understand the emotional relationships they build with brands in the physical world

Today's customers expect every organisation they interact with to know them. They have given you access to their data across each channel they have interacted with. So don't rest on your laurels - use it, analyse it, understand it.

Seamless customer experiences must be built around a combination of data and insights into the customer's real life. It's invaluable and can drive real change within your business.

Listen To Those Who Matter

Within this transformation, it is too easy to lose sight of the big picture. Brands tend to distract themselves, focusing on improving silos, with little or no sight of the brand.

But...

"Brands need to be informed by their customers, and led by their brand."

- Denise Lee Yohn

Businesses must understand why customers behave like they do - both online and off. This is core to your customer experience upgrade.

Customers know what they want, where they want it, and how they want to receive it. And it is up to the brand to make sure everyone within the company knows this information too.

There is no excuse for brands not to be in tune with the wants and needs of their customers.

Make sure you speak to the people engaging with your customers on a day-to-day basis, as well as your customers and your business leaders. After all, they are the one group of people that come face-to-face with the buying behaviour of your customers every day.

But you also need to remember to protect your brand proposition...

Your vision and purpose need to be at the heart of everything you and your people do. Irresistible experiences rely on an enthusiastic team, who are involved with your CX transformation from start to finish.

Your brand is defined by those who experience it; customers and employees. So making sure people throughout the business can easily define their role in the customer's journey - and how they need to align themselves with the brand - is a fundamental stepping stone. A stepping-stone to successful brand alignment.

To do this, consider the following:

- All changes need to have identifiable benefits for both customer and business.
- Before any positive, long-term changes can be made to the customer's experience, work on the inside of the organisation first.

Don't Run Before You Can Walk

Collecting the data and insights from your customers is the first step.

Understanding and anticipating this information is the next.

The third is using all of this to build a strong foundation from which you can develop and deliver a seamless customer experience.

This is also known as establishing your brand basics. The things that a customer expects you to deliver, but done in a unique and on-brand way. If a business doesn't deliver the basics well, it makes no difference what CX transformation is put in place - it simply won't work.

Irresistible customer experiences are about consistency. Consistency across every platform; every touch point; every interaction. This is a fundamental aspect of building a brand; establishing a level of trust and.

Brand basics are the stepping stones to those sought after 'wow' moments; brand amplifying moments that delight customers in a differentiated way. As soon as your brand has determined the crux of what your customers want, and created a way to deliver this to them - and well - you can then focus on introducing brand amplifiers to your customer experience.

But if a business can't get their brand basics right what chance do they have of amplifying their brand?

Take A Holistic Approach

Many businesses miss out on the integration of their digital and physical experiences. They storm into CX development using insights from the C-Suite organisation, with a strategy that is going to improve the business internally but not externally...

In this new era of branding, where customers are very much in control, brands need to make a change. They need to abandon their siloed approach, and instead opt for a holistic method...

- Collect and interpret data and insights from real customers

- Blend the digital and physical worlds to develop and deliver a seamless and irresistible customer experience
- Look at viewpoints from inside and outside your business; customers and employees
- Incorporate several different platforms and touchpoints into your customer experience strategy

- Focus on delivering your brand basics before designing those wow moments

Renewing your brand strategy and re-aligning your customer experience isn't going to happen over night. But if you can figure out how to integrate this advice, your business will have a good chance of making a mark on its industry.

Andrew Stothert
CEO And Co-Founder | Brand Vista

Andrew Stothert is the co-founder and CEO of Brand Vista, a global customer experience alignment consultancy. Andrew's life has been surrounded by brands and branding, and he is now dedicated to helping businesses deliver aligned and irresistible customer experiences.

www.brand-vista.com

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5 Steps To Launch Your Social Employee Marketing Channel

Cheryl Burgess

Social employees offer today's brands an incredibly effective new marketing channel, yet far too many organizations don't know what to do with them.

Over the past decade, social media has enticed brands as a low-cost platform with unprecedented access to customers and prospects. Yet despite improvements in content delivery and metrics, most organizations are unsure how to use social media and uncertain whether they're successful when they do.

The problem of social media marketing has been simple, but pervasive: Too much focus on the "media," and not enough focus on the "social."

As marketers, it's easy to get caught up in all the fun things social media allows us to do. However, if we've learned one thing over that past 10-plus years, it's that we should spend more time asking ourselves what we should do and how we should do it.

So what should brands be doing to maximize their social impact? For starters, try this mantra:

Be authentic.

Be helpful.

Be people-focused.

The best way to achieve these goals isn't through some fancy new software platform, but through something your organization already has in abundance: social employees.

Here's why: A few years ago, Nielsen found that "earned media" (e.g., peer recommendations, social reviews) was more trusted than any other form of advertising. Customers don't want to talk to brands. They want to talk to other people and make purchase decisions based on useful, fact-based information.

> ## Customers don't want to talk to brands. They want to talk to other people

Enter the everyday employee, whose voice customers trust more than any other within an organization - even the CEO's. Employee channels are eight times more effective than branded channels.

Consumers simply respond far better to employee-generated content. In fact, Altimeter found that 21 percent report "liking" employee posts - which is far higher than the response generated by a traditional ad.

Make no mistake:
The future belongs to social employees.
For today's brands, it's adapt or die.

Ready to launch your new social employee marketing channel? Here are 5 ways start:

1. Launch A Social Employee Pilot Program Using The 5 Ds Framework

There's a lot more to social employee advocacy than just opening a Twitter account and asking one of your interns to manage it. It's true that the best social employees deliver experiences that highlight authenticity, spontaneity, and creativity. However, they don't just bounce around the Internet like it's a giant pinball machine.

Through a well-designed pilot program, social employees learn best practices for engagement, content creation and curation, and maximizing impact. You can employ the 5 Ds framework we teach for LinkedIn Learning - Discover, Design, Develop, Deploy, and Determine - to design these highly successful pilot programs.

2. Create And Curate Compelling Content And Use It To Engage Target Communities

At its core, social employee advocacy is about being helpful. In both B2B and B2C, buyers spend more time than ever researching

options before making a purchase decision. Your brand may offer the best solutions on the market, but if you can't prove that to your prospects, then it's a moot point.

Different kinds of content work better for different industries, but at any rate, be sure to present your main selling points in a variety of ways. Blogs are great, but they're even better when supplemented with infographics or videos. Do your research; find out where your target buyers congregate, and learn what content formats they gravitate toward.

3. Focus On Branding From The Inside Out

What's your brand's story? What made your organization what it is today, and how does that impact the way you do business?
If you know what your brand stands for, great! But, do your employees? In social employee advocacy, authenticity goes from the inside out. The organization that shares brand stories, helpful content, and collaborates internally is far better equipped to do so externally.

If you know what your brand stands for, great! But, do your employees?

Today's organizations have countless enterprise platforms to choose from that specialize in content curation and storytelling. Choose the one that works best for you, and watch as your internal engagement creates a peerless foundation for real-world results.

4. Identify Your Social Leaders

Social employee advocacy isn't a one-size-fits-all proposition. In fact, the best social employee programs empower

their employees to determine their own involvement. Some employees are content producers, some are channel boosters, and some are the complete package. Everyone does their part, but your social leaders always pave the way for everyone else.

The best social employee programs empower their employees to determine their own involvement

Pay attention to the employee advocates who are the most involved, generate the highest returns, and push your organization to try new things. Then, formalize their leadership. Give them a platform within your organization to drive best practices and inspire others to up their game.

5. Get Upper Management And The C-Suite Involved

Your employee advocates are just one part of the social ecosystem. In marketing terms, one of the greatest advantages of social employee advocacy is that it's decentralized, relying on the cumulative impact of individual engagement in the digital bazaar.

This allows for a lot of independence, which is a good thing, but the best social programs still receive guidance from your organization's higher-ups. After all, if your senior leadership isn't driving big-picture objectives, tracking marketing goals, and increasing visibility for your social programs, then who is?

According to Altimeter, 90 percent of brands are already pursuing, or have plans to pursue, some form of employee advocacy. In other words, if your social employees aren't out there on the front lines engaging prospects, your competition probably is.

There's never been a better time to get started than right now.

As your brand prepares to try its hand at social employee advocacy, keep in mind that Rome wasn't built in a day. No brand can build an empire of social engagement overnight. Take your time, do your research, and try out different approaches. Before you know it, your social media marketing efforts will be soaring to new heights!

Rome wasn't built in a day. No brand can build an empire of social engagement overnight

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Cheryl Burgess

CEO | Blue Focus Marketing

Cheryl Burgess, CEO of Blue Focus Marketing, helps clients transform brands from the inside out by implementing strategic marketing initiatives that empower social employee engagement, and social executive leadership. Blue Focus Marketing is a leading Employee Experience (EX) services consultancy; delivering workshops on employee engagement, content marketing, e-learning, and social media marketing solutions. Cheryl is a course author for LinkedIn Learning, having developed an online video training course on Social Employees: The New Marketing Channel. She is the co-author of the best-selling book, The Social Employee, (McGraw-Hill) How Great Companies Make Social Media Work.

www.bluefocusmarketing.com

Crafting A Winning PR Content Strategy

Gini Dietrich

Too often, public relations work ends up being reactive. PR pros race from one fire drill to the next, completing executive to-dos that trickle in via email and texts at all hours.

It's no wonder the PR executive job just turned up as one of the most stressful careers.

One area that's especially hit hard by the seat-of-the-pants approach is PR content. Without a unifying strategy for engagement, each piece of content - news releases, customer testimonials, contributed content, blog posts, media profiles - lives and dies on its own individual merits.

But it could do so much more!

The Benefits Of A PR Content Strategy

You wouldn't set your executive team up for a media tour without having updated messaging and talking points, would you?

But when you're creating one-off pieces of content, without an overarching PR content strategy, you're missing out on the power of having all your communications efforts support one another - and your business objectives.

When your company blog posts show your executives' subject matter expertise and align with the contributed content they're publishing, and the stories you're pitching to the media, you're in the flow. Each win supports the next pitch. That's the power of a PR content strategy that looks at your PR activities holistically.

Each win supports the next pitch. That's the power of a PR content strategy

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What To Include In Your PR Content Strategy

If you haven't documented your PR content strategy because you don't feel you have enough time or resources to do so, I call shenanigans!

Your PR strategy can fit on a page. In fact, you're more likely to use it to drive action if you keep it brief and to the point.

It is a documented plan that identifies what content you're creating, for which audience, to meet which objectives, and with what projected results.

This, in turn, becomes your road map for planning all of your content throughout the year, so the individual pieces support each other and your larger business goals.

Your PR content strategy should define the following:

- **Your Audience Persona.** Who are you trying to reach with your PR activities? This should include your ideal customer, plus others in their organization who influence purchase decisions.

- **SMARTER Goals.** What are the measurable, time-bound goals you need to accomplish through your content and PR activities?

- **Metrics.** How will you measure your results against your goals? What data can you realistically obtain? What measurements matter to your executive team?

- **PESO Tactics.** The PESO model integrates Paid, Earned, Shared, and Owned media in a PR construct. Which PESO model tactics will you deploy to reach your goals?

- **Resources.** Who's responsible for the PESO activities? Do you need support or resources from other teams in your organization to complete these activities?

How To Measure Your PR Content Results

Of these five elements of a PR content strategy, I've found that metrics is where most PR professionals get hung up.

After years of reporting on vanity metrics such as media impressions and advertising equivalencies, it can seem intimidating to identify and implement metrics that show how your PR activities are having a direct affect on your business results.

Metrics is where most PR professionals get hung up

Use these six metrics to measure the real business results of your PR efforts:

- **Domain Authority.** You can find your website's domain authority using the Moz SEO toolbar. This number represents how respected your website is as a source of useful information. Benchmark where this number is at today, then track it over time. As your owned content is shared, and your contributed content drives traffic back to your website, you'll show how your activities caused it to increase.

- **Keywords.** What are the top five to 10 keywords someone looking to purchase your product or services is looking for through online search? Are you ranking on page one of search results for those priority keywords? Document where you are today, and track over time how reinforcing these keywords in your PESO-driven PR content activities changes your search visibility.

- **Website Visitors.** In addition to using Google Analytics, create unique URLs to track the traffic your PR efforts drive to your website.

- **Email Addresses.** Drive those website visitors to a lead magnet, such as a valuable eBook, white paper, or template, or even a newsletter subscription form. By doing this, instead of obtaining a link to your homepage, they will provide you with their email address and enter your sales funnel.

- **Qualified Leads.** Leads are a good start, but qualified leads are what's most important. How many of those email addresses were from people who fit the persona of your ideal customer? Make sure you understand your sales team's lead scoring criteria and use it to inform your personas and tailor your content.

- **Sales Conversions.** This is the holy grail of showing the ROI of public relations. How many closed sales did you drive through your PR activities?

Leads are a good start, but qualified leads are what's most important

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A PR content strategy won't prevent you from having to respond to organizational fire drills. But it will help you respond in a consistent manner. Further, it will help you make all of the content you create as part of your daily efforts work harder and show measurable results.

BQ

Gini Dietrich

Founder and CEO | Arment Dietrich

Gini Dietrich is the founder and CEO of Arment Dietrich, an integrated marketing communications firm. She is the author of Spin Sucks, co-author of Marketing in the Round, and co-host of Inside PR. She also is the lead blogger at Spin Sucks and is the founder of Spin Sucks Pro.

www.spinsucks.com

Conducting A Rapid Ideation Workshop: 10 Questions To Ask Before You Get Started

Diane Longmoor

Your organization (or client, if you're inside an agency) is about to embark on the process of designing a new product, feature or service, and you have a mandate to come up with a great design solution. A design ideation workshop is a great way to generate lots of ideas early in the process, bring your broader project team along, and set direction quickly.

Design workshops have been in the UX toolkit for a long time, and they're an important part of the design process. I've found that a great workshop is tailored to the needs of the team, and knowing what approach to take is key to success. Asking yourself these questions before you start can set your team up for an efficient, productive workshop, even if you have just a few days to produce an outcome.

1. What Do You Know About Your Customers?

We've all seen the dreaded demographic presentation, containing slide after slide of faceless customer data and awkward "segments." While important to understand the broader market for a product, such presentations don't help designers and stakeholders understand the customer from a human point of view. For a great rapid ideation workshop, you need everyone to get on the same page regarding who you're designing for and what they need - fast.

Kicking things off with an exercise to discuss existing research, assumptions and gaps in knowledge will go miles toward laying the foundation for design ideas that are relevant to the target audience. In the agency world, we find that some clients know a lot about their customers and can bring it all to the table; but many need help defining who they should be targeting. Prioritizing user groups is another key aspect of this exercise.

There are many ways to conduct this kind of exercise, but the main points you're trying to gain consensus on are:

- Who are we designing for?
- What do we know about their motivations, opinions, and characteristics?
- What do they need from the experience?
- Who is most important, and who is secondary?

2. Who Will Be In The Room For The Working Session?

There's nothing worse than getting through weeks of design, only to be set back because someone's input wasn't heard early in the process. Avoid this by inviting a broad group to the table: executives, designers, developers, marketers, customer service representatives, and anyone else who could provide input. Think about your organization: who will have strong opinions that need to be heard early? Who has a valuable perspective that perhaps isn't typically at the table?

It can seem logical "not to bother" individuals like a lead developer who won't be fully engaged in a project until the details are more concrete, but their perspective is critical in the early stages.

Who has a valuable perspective that perhaps isn't typically at the table?

3. Do You Know What The Competitors Are Doing?

I'll never forget the day my team published an outbound email for a high-profile consumer brand client, sending the email to thousands of subscribers with a headline that we quickly learned was almost identical to a competitor's slogan from the prior year. You do not want to make that kind of mistake! After that day, we plastered the office with screenshots showing every competitor's home page and key outbound communications.

Knowing what's happening in the space you or your client operate in is an essential part of the ideation process. It grounds you in what already exists, and challenges you to raise the bar, rather than replicate what others are doing.

4. How Will You Get Participants To Think Creatively?

Often, participants in a design ideation session fall into two groups: those who already have a strong perspective and idea that they want to get onto the table, and those who are experts in what exists now. Both types of people are well served when you bring examples outside your core business for discussion.

For example, in a recent ideation session for a health insurance organization, it was decided that the target customer had a high priority need to find the right health care plan for their unique health situation. It's valuable to look at other health plan finders (see #3), but also examples of product choosers from the retail space. Seeing these examples helps participants get out of their pre-conceived ideas and makes them more receptive to new ideas.

5. Looking For Blue-Sky Thinking, Or Something More Targeted?

There's a time and a place for blue-sky ideation. For example, you might want to brainstorm a lot of ideas around how to bring more customer delight into your service. But more often you need to operate within constraints and, in fact, constraints create better design. Clearly identifying the constraints and staying within those boundaries will prevent your team from going "off the rails" into territory that is interesting, but not relevant to the project/initiative. Be up front with your team from the outset, and agree upon the guardrails.

6. How Much Time Do You Need?

Design ideation is a team activity, which means you need to bring a diverse group of people together for an extended period. But it can be challenging to line up whole-day working sessions with people outside the design team; and even if you could calendar those kinds of meetings, long meetings can wear down the team, no matter how interesting your workshop.

Design ideation is a team activity, which means you need to bring a diverse group of people together

One way to solve this is to break your ideation workshop into several chunks. You can schedule several two-hour sessions, with breaks; or spread the session out over an entire week. Just remember that most people in the organization have other commitments, and don't expect that you'll be able to get an entire day of anyone's time (other than your own).

7. What Format Will Your Ideas Take?

I'm a believer in low-fidelity sketching to communicate ideas. As we typically design digital products, we start most of our engagements with sketch ideation based on the outcome of a requirements workshop. It's fast and efficient to create sketches and we can generate many ideas quickly. Sketches are also open to interpretation, so they encourage workshop participants to see and discuss possibilities, rather than focus on details that aren't yet relevant. In this process, generate as many ideas as possible, then winnow them down to five to seven core concepts, which can be presented to stakeholders on the final day. Their feedback and ideas are then rolled into the next phase of the project.

Other deliverables from a workshop of this type can include audience profiles, visual mood boards, a journey map, or a design pattern collection - whatever the team needs to envision the experience.

8. Who Will Produce The Ideas?

Some teams might ask everyone in the room to design - including project managers, developers, marketers, writers, etc. But I've found this approach to be inefficient. Professional designers flex their "design muscles" every day, and a good designer can generate a high volume of ideas quickly, while someone whose core skills lie elsewhere will find this activity challenging and will produce little usable design.

Typically, I don't ask clients to sketch ideas. However, there are exceptions. Recently, a large social media platform client wanted to explain their advertising model to their small business customers. The model was so complex that we, as consultants coming from outside the organization, couldn't explain it without their help. So instead, we held an ideation workshop where the clients

did the sketching, presented their sketches to us, and the best ideas were taken forward into the design work. The experience was fun, enriching, and got us what we needed to move forward.

If you have a team of designers ready to ideate, don't ask them to brainstorm all their ideas together as a team. Individual ideation - interspersed with checkpoints to get feedback and work together - is actually more productive than working as a group.

If you have a team of designers ready to ideate, don't ask them to brainstorm all their ideas together

9. How Will You Drive Consensus Toward A Direction?

Your team came up with a concise description of your customers and their needs, you've reviewed the research, competitors and inspirational material, and your design team has generated a ton of great ideas. How do you get your broader team to align with the ideas that have legs, and which are destined for the cutting-room floor?

Strategies vary, but I take three steps over about two hours:

1. **Present:** Quickly remind everyone of the goals, user needs and priorities they agreed upon. Quickly present ALL concepts so everyone can see the breadth of ideas. Otherwise, you risk getting caught in a lengthy discussion of the first concept, with limited time to discuss others. Have the team take notes on points of interest in the work.

2. **Listen:** Structure the discussion to ensure everyone has the opportunity to weigh in on each concept.

3. **Guide:** This is where the facilitator's skill matters. Driving a large group to narrow down the options requires the facilitator to have a strong grasp of the goals, users' needs, the competition, and the constraints, but also requires they've done a great job listening to everyone's concerns in step two.

10. How Do You Ensure Your Ideas Don't "Collect Dust" After The Workshop?

It's important to show additional fidelity quickly once you have a basic direction. Typically you would use the following four to five days to create a final storyboard - including revised sketches and light narratives - to show a cohesive vision of the planned design execution. If your workshop included a collaborative visual exercise, a revised single mood board might be appropriate. The key is to take the results of the workshop and continue building on them right away, while your broader team is still energized to move forward with your bold ideas.

Diane Longmoor

Director, User Experience | Fell Swoop

Diane Longmoor is the Director of User Experience for Fell Swoop - a digital design firm in Seattle. In seventeen years as a designer and researcher, she has created highly usable, engaging experiences for clients such as Condé Nast, Facebook, Harley-Davidson, Microsoft, and T-Mobile.

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Moving Past Translation: When The Market Next Door Speaks A Different Language

Scott Schwalbach

A large mobile telecom company was looking to increase market share in the United States. A survey of their current customers indicated that most spoke only English. Further research revealed that in large urban areas, where major populations did not speak English, the company's multicultural growth was stagnant.

In order to engage the Hispanic market and increase market share, the telecom company hired a firm to quickly translate its website content into Spanish, thinking that if the words were in Spanish, the Hispanic community would be able to read the content, engage with the company and buy their products and services.

Not surprisingly, their "translation as an afterthought" strategy was unsuccessful.

Market share in the Hispanic market didn't increase, and their target audience had a number of reasons for not engaging: Because the translations were grammatically incorrect and of low quality, the website portrayed an unauthentic voice; the ideas the site expressed weren't those the Hispanic community could identify with; and the images on the site were not culturally reflective of the people in their community.

Whether you're marketing within your local country or overseas, engaging audiences in their native language requires more thought and planning than simply translating words. Localized marketing efforts need to be culturally relevant, too. Engaging multilingual markets requires an understanding of cultural, linguistic, and strategic factors, including:

Engaging audiences in their native language requires more thought and planning than simply translating words

Cultural Differences

By identifying and embracing cultural differences, you can engage on a personal level, which can lead to increased market share. In the United States, and within any population where people from multiple countries reside, even though people speak the same language - Spanish, for example - there are distinct cultural differences to consider. The Hispanic populations in Los Angeles that are of Mexican, Central American, or South American descent have vast cultural differences from populations in Miami, who are predominantly of Cuban or Puerto Rican descent.

Dialects

Engaging the audience in a dialect with which they identify brings trust and understanding. For example, while French is the core language in both Paris, France, and Quebec City, Canada, there are many linguistic differences between the two.

Engaging the audience in a dialect with which they identify brings trust and understanding

Audience

It's important to ensure your content is localized (translated and made relevant) by in-region linguists who understand your audience demographic, including age and socioeconomic status. Language is constantly changing, with new words coming into play and others considered outdated. For example, you wouldn't want a video game marketed to teenagers translated into German by a 60-year-old translator living in the California desert. It's highly unlikely the translator is familiar with the latest terminology, and your audience would mock your product and marketing techniques.

Laws And Regulations

Be aware and knowledgeable of the business and marketing rules and regulations in the regions you're operating in. For example, laws in other countries can restrict how you position your company or product against the competition. Many countries would never allow you to say, "Our Widget is 60 times more colorful than Barkley's Widget". A professional, highly qualified localization service provider (LSP) can confirm that you meet the country's laws and regulations.

Engaging with your global customers (even if they are local) in their own language and culture ensures that you are making a connection, building trust, and positioning yourself as a member of their community. Finding the right partners to help bridge that connection is important to maintain brand integrity. Your partnerships should include both technology and localization service providers, all working in unison to achieve the highest quality localized content.

When seeking technology partners, look beyond the current convenience of the tool itself. Consider partners that can adjust to your internal processes, are adaptable and can seamlessly integrate with your current and future toolsets. The partner you choose should provide minimal disruption to create a smooth workflow. Work with your technology partners so that they not only understand your current internal technology stack, but also your roadmap for future growth. Aligning on future growth strengthens the partnership, strengthens your offering, and strengthens the commitment between you and your selected technology partner.

Today's LSPs offer more than translation; they also provide services such as transcreation, international SEO services, in-country application testing, video services (voice over, close captioning, screen capturing), and terminology management. By engaging with your LSP early in the process, you can leverage knowledge in areas where most companies aren't familiar. Many localization service providers' resources and employees are in-market, native speakers, subject matter experts, and take pride in giving the best advice possible to their clients.

Identify an LSP that offers subject matter experts who know your industry - you will benefit greatly if the translators are familiar with the language and terminology specific to an industry, such as pharmaceutical, law, financial services, or other highly specialized topic. Building a solid relationship with your LSP is beneficial because they will better understand your product, which will help you successfully engage with global stakeholders and provide the best global brand integrity.

Identify an LSP that offers subject matter experts who know your industry

Technologies exist to help you organize and deliver your messaging to customers more quickly than ever before. While I highly advocate the use of these tools, I recommend using the right tools, not the most convenient tools. Robo-crawlers that do literal translations and push your content to market without in-context review dilute your brand, limit the quality of the language, and often offend and disengage your audience.

Engaging locally, whether in your own market, or other countries, makes you truly a global thinker with a global mission.

Scott Schwalbach

Chief Customer Advocate | Cloudwords

Scott Schwalbach is the Chief Customer Advocate at Cloudwords, a software provider transforming the way companies manage global campaigns and localized content. As a recognized localization industry expert, Scott has more than 40 years of experience working for and with some of the largest companies in the world. He is a co-leader for the Localization Unconference, frequently speaks at industry events, and teaches courses in global communications and customer expectations.

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Mastering Visual Storytelling: Three Tips To Avoid Tech Tunnel Vision

Piotr Jaworowski

Every generation experiences a creative movement. Back in the day of Andy Warhol, artists recognized visual communication was moving at breakneck speed. Warhol himself said, "The idea is not to live forever, it is to create something that will." It's true, from still imagery to graphic design and digital animation, when a story comes to life; it's the visuals that leave a lasting imprint.

Brands are learning quickly that leaving a lasting impression is much easier said than done. As a result, they're rethinking their visual and digital storytelling practices to stay relevant and top of mind with their audiences.

These businesses understand that they need compelling content and new technologies play a part. Today, there are many more choices to be aesthetically pleasing and to deliver meaningful content. At the same time, professionals need to be more selective about the tools and technologies they choose and the creative techniques they apply.

The Battle For Attention And Emotional Connection

Your content is battling for attention while consumers are unconsciously absorbing thousands of messages a day. Wanting your story to be recognized, appreciated, and remembered makes it easier to fall for "shiny new objects." However, using technology that doesn't support your story or excite your audience is not the answer. You can't get around the need to have a deep understanding of both your story and the tools and technologies available to tell them. If you feel that your stories are well thought out but they just aren't getting any traction, then here are three great visual tips to raise your creative bar, while avoiding what I call the Tech Tunnel Vision Trap.

Using technology that doesn't support your story or excite your audience is not the answer

1. Every Story Must Be Authentic And Strike A Balanced Approach

A good story is closely aligned with the cultural or personal beliefs of the audience and one that your brand is qualified to tell. The technology you choose helps you to achieve this balance by enhancing the point of view while creating the visuals that connect with your audience and resonate on a deeper emotional level.

2. Avoid Emphasizing The Tools And Technology Platforms Over A Good Story

For example, Virtual Reality (VR) can unlock an amazing experience, but it's not for every brand campaign. Always consider your options so the science can serve the art properly. Should you use still photography or motion graphics, flat or 3D visuals, computer generated imaging or augmented reality? Sometimes a great still photo combined with computer-generated imaging is the right choice for the story and your budget. Choose those that work best for each story and where the story will live. It may be on canvas, or it may be on the Oculus. Or it could be both.

Always consider your options so the science can serve the art properly

3. As Your Options Become More Complex, It Makes Sense To Collaborate With Partners

Sometimes you need a little help from your friends. Bring your partners into the process early, from your brand experts and designers to your developers. Together, you will bring your story to life visually to achieve that lasting impression.

Not long ago, dermatology leader Galderma commissioned a campaign for Soolantra, a new pharmaceutical product to treat a skin condition called rosacea. It started with a classic story archetype, "good guys vs. bad guys." The team - which included artists, developers, and the brand team - focused first on preparing how to tell the story with single images.

During the initial stages, the challenge was to explore how to create engaging imagery depicting the clash between the heroes (the medication) and the villains (the skin affliction) with the print channel in mind. CGI was the technique best suited to this artistic challenge, as it gave the design team precise control of the emotional impact.

It's surprisingly difficult to create the perfect single image that conveys the full story. The designers imbued the characters with highly expressive faces and postures and worked with the developers to be sure these treatments would translate wonderfully to animation, print - even 3D. Once those explorations were complete, team members turned their attention to designing a wider palette of eye-catching visualizations for use in both print and digital media.

The final step was to create the animations that accompanied the digital launch - and again, the artists, CGI developers, and brand team collaborated closely. In the end, Galderma's stakeholders, its prospects, and the graphic community embraced the work, which earned a Cannes Lion.

## Moving Forward Without Tech Tunnel Vision

New tools and technologies give you so much more control over your visual imagery, in ways not possible in years past. However, the technology is only part of a compelling visual story; it's not the whole story.

You have to consider the story first, strike the balance with your technology, and then drive home your effort with the right team. When you do, your story will resonate on a much deeper level.

> **The technology is only part of a compelling visual story; it's not the whole story**

Remember, mastering digital storytelling is a careful blend of art and science. After all, it was Andy Warhol who also said, "Art is what you can get away with."

True, you can and should push the limits of your creativity and move out of your comfort zone. But, when it comes to your audience, falling into the Tech Tunnel Vision Trap will not create the emotional connection, or leave that lasting impression.
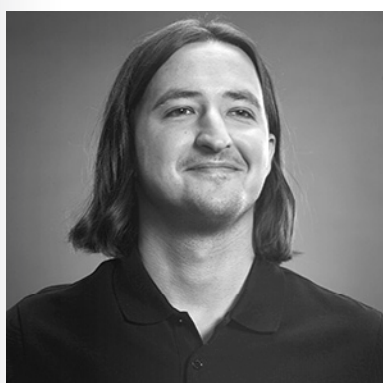
Piotr Jaworowski

CEO | Ars Thanea

Piotr Jaworowski is the co-founder of the Warsaw, Poland and New York City based creative CGI studio, Ars Thanea. He is also CEO and the Executive Creative Director at the firm. Piotr works with some of the biggest worldwide brands including Nike, Facebook, HBO, Visa, and CHANEL, to name a few.

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Wherever, Whenever: Developing A 360° Brand Identity

Andrew Vesey

As a new dad, I've learned very quickly that any sense of control you have is most likely an illusion. You may plan, organise and prep well, but then - life happens. The same is true when you're maintaining a brand identity - employees happen; customers happen; distribution channels happen; superfans happen; life just happens.

You can develop the 'perfect' identity for your brand, unveil it in an award-winning fashion, become an industry case study, and then life happens. The brand identity that you believed you had full control over meets the real world and the illusion dissipates.

Customers interact with your brand how they want to, and it won't necessarily be how you think

Customers interact with your brand how they want to, and it won't necessarily be how you think. Superfans and (non-contracted) brand advocates will do what they think is in the brand's best interests. Your own staff - some will do what they think is 'on brand', the others 'meh.' Your fresh new brand identity is at their mercy. But, it doesn't need to be.

In fact, all of these interactions with your various brand supporters can be extremely valuable, in that they will allow you to discover new ways to think about your brand and new ways to deliver it. The key is in harnessing all that power and directing its energy into a unified vision, rather than a dozen conflicting opinions.

So what do you do?

Well, just telling everyone you can think of "this is what you do" and "you're not allowed to do that" isn't going to work is it? That's like telling a newborn baby not to do something - they simply won't understand (and by the time they do, they'll think they know better).

What about planning everything out to the Nth degree? Cross all the t's, dot all the i's, line up all the parallel and perpendicular lines, and go colour matching crazy - that'll work, right?

It might 'help,' but it certainly won't 'work.'

Think of it like this. You're a world respected architect, and you have been commissioned to design an entire city block. The buildings are all unique, yet harmonious, the pedestrian areas are beautiful, there's just the right balance of parking, parks, traffic flow, and places to rest - oh, and there are some amazing sculptures dotted throughout.

It's perfect...

Then, along comes a group of parkour enthusiasts... life happens. Walls are being run along, sculptures are scaled, and rest areas become the most chaotic places on the block. Just planning your brand identity down to what you consider the 'smallest of details' won't be enough to ensure consistent delivery. It takes more.

Now, don't get me wrong. I'm a big advocate of developing solid brand manuals. In fact, if your company doesn't have one, stop right now and make a note to start developing one later today. I believe brand manuals are vital to the consistent delivery of your brand identity, but let's be honest - what good is any book if it's missing half the story? And, how can you expect every person connected with your brand to read through it all anyway? You can't. It's just not physically possible.

So, what's step one then? Well, let's start with step 0.5 first - develop a brand manual if you don't have one. Then it's on to step one through ten: expand on your brand guidelines with attention to what happens in real life.

As I said earlier, you've planned things out as well as you can, but life does happen, and unless you have experienced every aspect of your business and brand yourself (internally and externally), you can't hope to pick up on all the small nuances.

A lot of the people utilising your brand manual will be marketers or salespeople - not designers

Giving internal stakeholders and external advocates no-brainer brand guidelines and resources makes consistency achievable. Because, remember, a lot of the people utilising your brand manual will be marketers or salespeople - not designers. So expecting them to have the same spatial and design awareness of those who developed the identity would be foolish.

Therefore, we want to find out from these valuable brand champions how they interact with your brand and, just as importantly, how they witness others experiencing the brand. Once you do this, you become aware of the many different facets of your brand delivery and can start to create additional tools and contingencies to assist, rather than try and control, others.

Do you have a lot of superfans, or are you in an industry with a lot of dedicated websites and social platforms? Perhaps it's time to 'go retro' and hark back to the early 2000s, when many game, lifestyle, and hobby brands would build 'fan site' packages for users to download and build their own shrines to the brand, using authorised materials.

What could that include? Logos (official and stylised), branded images, audio or video, textures and backgrounds - find out - ask the people currently creating their own stuff. Focus group your fans and find out what they like using, and how they like to use it. You can, of course, set rules of use, but try to make this promotional collateral as much of a no-brainer as possible.

How about those brands with a large network of distributors (aka: a large network of potential brand hiccups)? They're not white-labeling your product, are they? They're representing your brand and you want them to do it well. You can't risk your awesome brand marketing efforts getting dampened by lacklustre execution by distributors. And, once again, trying to tell them what to do will only get you so far – you need to talk with them... you need to listen to them.

You can't risk your awesome brand marketing efforts getting dampened by lacklustre execution from distributors

Don't expect distributors (or franchisees, or licensees for that matter) to be able, or willing to put as much effort into maintaining your brand to the high standard you have set. They won't have the same resources as you. But, they don't need them - they have you.

Perhaps providing access to your in-house design team, or a centrally located brand and marketing resource management (MRM) system is in order. Rather than an additional cost, an MRM system is an investment in the long-term health of your brand identity - a poorly executed or neglected brand would have a much higher price tag. And, to be quite honest, that long-term view will see your expenses reduced overall as well.

So, talk with your distributors. Find out how they can make the best use of your branded and marketing materials. Through which avenues do customers experience your brand? Where are the areas they could use more assistance with presenting and promoting your brand effectively? Discover what they want, meld that together with what your brand needs, and deliver a solution that benefits you both.

Those are just two areas of your brand support network to start looking at. There are many more - frontline staff, the sales team, and commercial end users for example. Do they need a steady supply of branded content they can personalise? Do people even use business cards anymore? Are branded domains something that would boost their brand delivery power?

Or, would just understanding your brand manual properly make the biggest difference? Perhaps a brand boot camp (or slightly nicer

sounding training event) is required, or try to lessen information overwhelm with custom brand manuals focusing on only the areas each group works within.

Or, would just understanding your brand manual properly make the biggest difference?

This article would get way too long if I tried to cover everyone and everything they may need - and you'd get a bit bored of the same message, so I'll just leave you with this...

Talk with, and listen to, those who deliver and experience your brand. They will help you create a stronger, more cohesive, 360 degree brand identity.

Andrew Vesey

Chief BrandMan, Founder | Vesey Creative & Brand Quarterly

Andrew is an experienced brand and marketing professional with over 15 years in the industry - a majority of those have been as the Chief BrandMan at Vesey Creative, which he co-founded in 2003. In 2011, driven by his passion for branding, business and education, Andrew made the move into publishing by launching Brand Quarterly - this very magazine - and in 2014 Brand Quarterly Online. When not writing or developing partnerships and new initiatives for Brand Quarterly, Andrew works with a select number of clients - spanning the globe, from New Zealand through to the United Kingdom and the United States - developing, refreshing and implementing brands for both products and companies.

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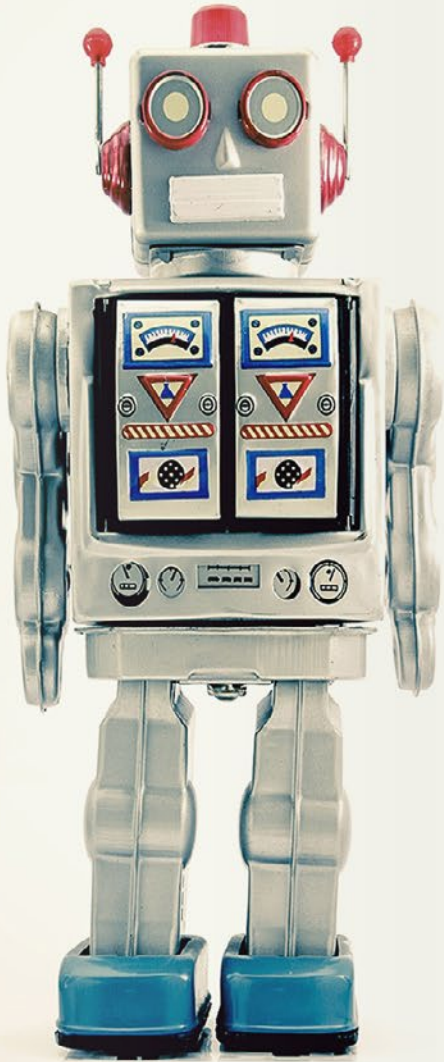Menlo Park, Silicon Valley | October 2 - 3

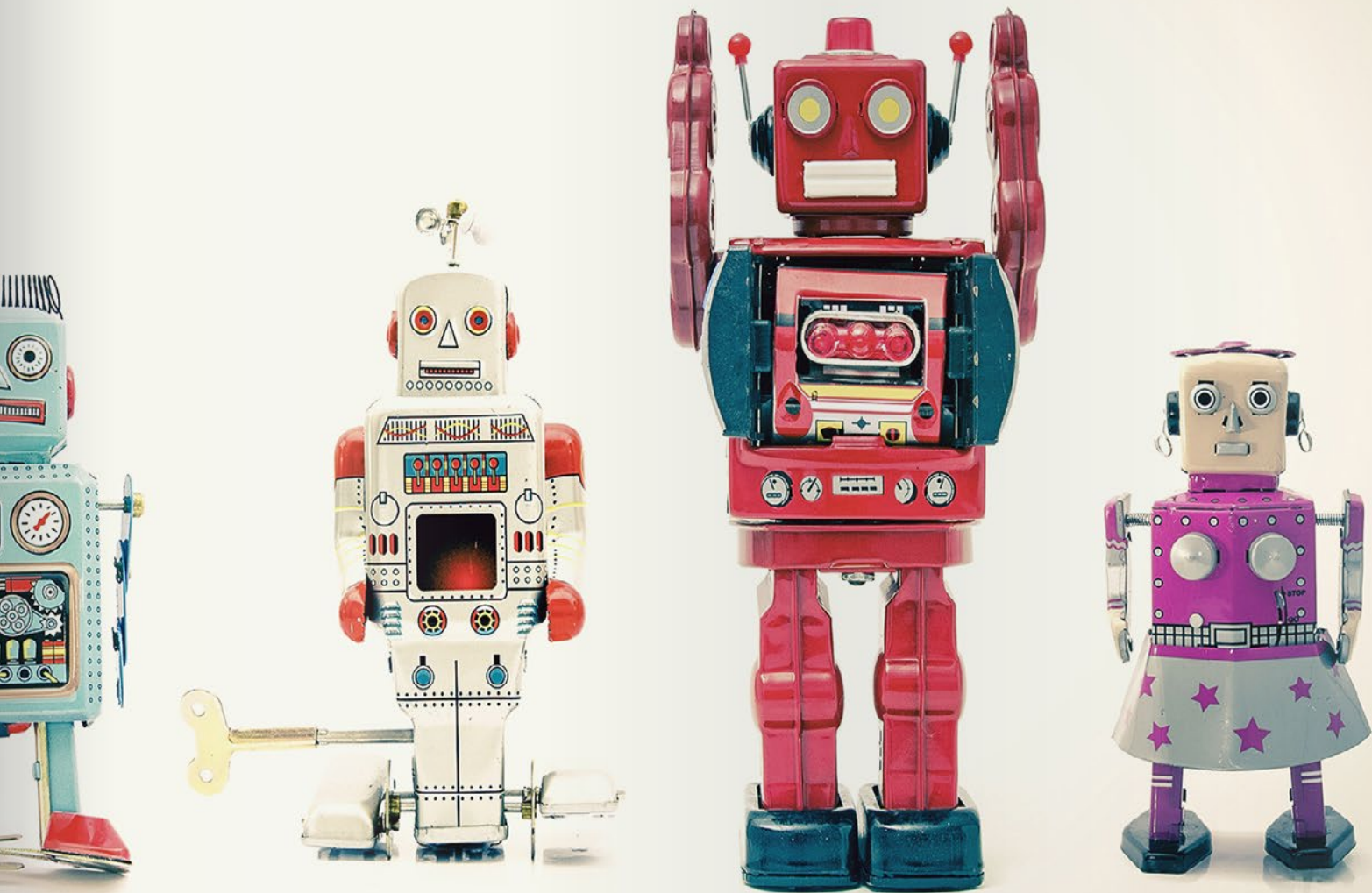**THE GLOBAL BRAND: EXPANDING IN THE DIGITAL AGE**

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Can Chatbots Jump The Uncanny Valley?

Colin Strong

A new technology has now captured the imagination of CX directors everywhere - chatbots.

Their promise is attractive. They can be used to automate the way in which customers interact with brands, meaning that huge costs of human labour can be avoided. Of course, the movement of customer service to online channels is nothing new.

A McKinsey survey from 2015 estimated that digital-care channels (e.g. web chat, social media, and email) accounted for 30 percent of customer-care interactions and that by 2020 it is expected to grow to 48 percent.

The difference with chatbots is the way they use AI and machine learning techniques to provide meaningful responses at scale.

China provides good use cases for this with 600m people using they messaging app WeChat to do a variety of tasks from booking doctor's appointments to paying utility bills. And in 2016, KLM was one of the first to launch a chatbot for Facebook Messenger. The service enables KLM flyers to automatically receive their itinerary, flight updates, check-in notifications, get their boarding passes and even rebook flights all from one thread within Facebook Messenger.

These sorts of examples support heady projections with Gartner estimating that more than 85% of customer interactions will be managed without a human by 2020. But perhaps the real excitement of chatbots versus other forms of digital-care, is the seeming potential for them to offer an almost human-like form of engagement.

Chatbots are, well, chatty. Their responses can be crafted to offer a personable style of communicating. Sometimes, perhaps a little too personable, as some brands have found to their cost. Coca-Cola's automated #MakeItHappy campaign in 2015 was suspended after it was tricked into tweeting lines from Adolf Hitler's "Mein Kampf". Similarly, in 2016 Microsoft's AI chatbot "Tay" was taken offline within hours of launching for posting racist and genocidal tweets.

Nevertheless, our desire to engage with machines in a human way has long been understood by psychologists and has been dubbed 'The Eliza Effect' after a computer programme named Eliza, developed by MIT computer scientist Joseph Weizenbaum. The programme was designed to reflect a psychotherapist, largely by rephrasing the patient's replies as questions.

Weizenbaum was famously surprised by the enthusiasm of his secretary for interacting with Eliza, despite her knowing it to be a computer programme. He considered that this reflected a 'powerful delusional thinking in quite normal people'.

Of course, this apparent tendency to treat computers in a human-like way has considerable potential benefits for companies, as it suggests the promise of being able to offer emotional engagement as well as efficient, low-cost servicing.

But is it this simple?

Writer and commentator Sherry Tukle has explored the way that people engage with technology such as Eliza and concludes that users are well aware of their limitations. As was the case with Tay, some people embark on an all-out effort to trick and expose them as 'mere machines'. Others will happily collude in the delusion of the machine as lifelike, going out of their way to ensure the questions they asked would not 'confuse it'.

Therefore, we need to be careful with the idea that Chatbots can offer emotional engagement. An onlooker may assume that the way a user communicates with a machine is emotionally engaging - but the user themselves may not feel that way. The reality is a more complex set of interactions that may still have value, just not the value that we think.

We need to be careful with the idea that Chatbots can offer emotional engagement

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Another difficulty perhaps comes when customers don't know if the text they are seeing is coming from a machine or a human. The expectations and norms that we all bring to a dialogue with a computer are likely very different to the ones we bring to other humans. For many customer service interactions, there is also no guarantee that

we are interacting with bots when we even think we are. Microsoft researchers Mary L. Gray and Siddharth Suri recently pointed out that "Much of the crowd-work done on contract today covers for AI when it can't do something on its own… real live human beings clean up much of the web, behind the scenes."

The problem is that this lack of clarity could bring unintended consequences for brands relating to the notion of 'uncanny valley'. This was a term first used in 1970 by Japanese roboticist Masahiro Mori, who noted that although we tend to warm to robots that have some human features, we tend to be disconcerted by them if they start becoming too realistic.

The uncanny valley effect has been blamed for the failure of a number of films that used CGI where the characters have been very human like while the audience are aware that they are in fact animations. The movie 'Polar Express' is often cited as an example where the effect left it with lacklustre box office sales. Research I have conducted indicates that this uncanny feeling is bad news for brands as it creates a sense of distance, the exact opposite of what was intended. Chatbots are in danger of exacerbating this very issue.

A final complexity for brands and their relationship with customers is the way in which customer data is increasingly used to personalise their experience. Brands are developing psychological profiles of

consumers based on their online data, whether social media or transaction data. And of course, while chatbots offer the promise of the delivering this personalisation at scale, it's hard to know how to respond to a bot that appears to know something about your personality.

As commentator Sarah Watson points out, 'We don't often get to ask our machines, "What makes you think that about me?".' The desire to create intimacy and close relationships can work if done carefully and openly but done badly can feel creepy and intrusive.

The technology of customer experience is currently racing ahead of our understanding of the consumer response. As we each know from our daily lives, it is all too easy to look at an interaction where superficially all is well but still have an uncomfortable feeling that something is not quite right. Companies recognise the importance of emotional connection to drive long-term relationships. But quite whether chatbots can help deliver this remains to be seen.

The technology of customer experience is currently racing ahead of our understanding of the consumer response

Colin Strong

Global Head of Behavioural Science | Ipsos

Head of Behavioural Science at Ipsos, Colin is a UK based consumer researcher working with brands to shape their global strategies via the integration of data analytics and more traditional market research techniques. He is the Author of 'Humanizing Big Data', speaker and regular contributor to a range of publications and blogs including Huffington Post and Wired.

www.ipsos.com

4 Insights To Bring Your Brand's Web Analytics Into Focus

Jorge Chediak

Excuse me, but do I know you?

No, but your customer does.

Each Facebook like, Twitter follower, and Pinterest pin goes into that analytic stew and provides a clearer view of your brand's overall social standing.
In short, consumers get to tell you what they like - and don't like - about you.

It was the will of the people, in fact, that prompted Domino's to change its recipe a few years back. The company centered an entire campaign on the concept, going so far as to say that people actually hated its pizza.

Of course, the real message wasn't the subpar status of the crust, sauce, or other ingredients. It was that they heard what people were saying and responded proactively to provide customers with a better product. The sheer magnitude of web data at its fingertips allowed the pizza chain it to identify a problem, come up with a solution, and chart a course of action.

Other brands can do the same.

Perception Is the New Reality

When it comes to consumer insights, most brands find themselves in a bit of a quagmire. It's a boon to have an almost endless amount of data on your customers, but once you do, you need to figure out what to do with it - and what it all means, at that.

The esteem in which consumers or prospects hold your brand is the ultimate testament to your efforts. But the only way to get a read on those perceptions is to start listening to the conversations.

It starts with measuring social sentiments instead of comment volume. When people get excited about a new product or feature, maybe it's something you want to bring to the surface. Make sure people know everybody's really amped about what you're now offering and learn from that excitement.

The same holds true when people get down from a negative interaction or news item about a product or experience. Less-than-optimal interactions with a product or experience provide an opportunity to change organizational operations. Once you do so, make people aware of the shift. That's the only way to affect the conversation.

The information is out there. You just need to start using it to engage and encourage a purchase because, rest assured, your competitor is doing it.

Follow Through on Your Findings

If you're going to better engage consumers and get them to convert, you've got to do more with those clicks and shares than just track them. You must leverage those insights to look at potential customers in a different way, and this often requires the following:

1. Consider Cause

Most people visit a website looking for a solution to a problem. When they don't find it, chances are they'll bounce to the next. Intent is at the heart of conversion, and it's how you should go about optimizing your site.

Intent is at the heart of conversion, and it's how you should go about optimizing your site

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Figure out what brought visitors there in the first place. Was it referral traffic? Did they come by way of keyword or email or banner ad? Look at the path and make sure it aligns with the experience on the page. It'll give you a better idea of their desired outcome.

If the pages-per-visit number is high, drill down beyond that statistic to understand why people still fail to convert. Sticking around shouldn't be confused with interest. Visitors could be going from page to page because they can't find what they need, which can leave a bad taste in their mouths as it relates to that brand.

2. Simplify Conversion

Navigation may seem like a no-brainer, but companies get it wrong all the time. Don't ask visitors to jump through hoops to make a purchase. Make sure your navigation leads consumers to the right page of their journey.

If your call to action is something like, "Learn more about price," don't link to your home page. Not only does it leave customer questions unanswered, but it also forces them to continue clicking to find what they need.

Marry pages-per-visit with the user flow and visualization available within web analytics platforms. This gives brand managers a better understanding of what users do on your site, how they're best engaged, and whether a change is necessary.

3. Measure Behavior

The user experience isn't just driven by intent: Your site plays a critical role in that overall experience, too. Understanding the context of how users behave on your site can help.

UserTesting.com, for example, allows you to watch web sessions and observe the browsing behavior of your visitors. As soon as you identify the path taken, you can learn how to better design your pages to serve up content earlier in the experience.

To add even more context, consider tying behavior to shares or comments. What people say or share can direct changes in messaging and improve brand engagement, especially when joined with behavior.

4. Address Negativity

In terms of social, clients often ask, "What do I do if I get a negative comment on a Facebook post?" One word: Respond. Get to the bottom of why, try to resolve the issue, and figure out how to satisfy the user's needs.

But don't just focus on the negative. Reach out to those who sing your praises and thank them for their support. You want to encourage this behavior just as much as you want resolve customer issues.

While tools are available to monitor sentiment, full comprehension of how those resources work can be limited. Our company was using software to monitor client mentions, and everything seemed negative - except it wasn't. It's just that certain 'negative' words can be used in positive comments, skewing results.

From a big-picture standpoint, web analytics can help marketers understand how users want to engage with their brands - whether it's in navigation, content consumption, user experience, or simply the message. Brands that understand what's effective can make adjustments as necessary.

> **Web analytics can help marketers understand how users want to engage with their brands**
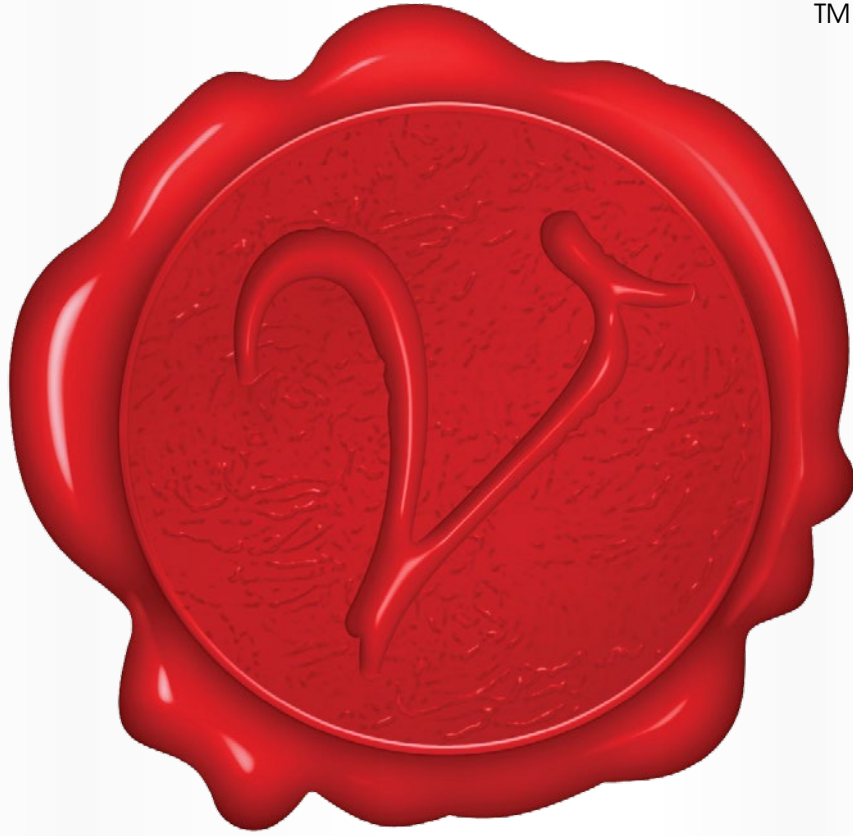
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