

Optimizing the Prospect's Brand Passage™

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Summer Conference

PIMA (Professional Insurance Marketing Association)

New Horizons

Personalization

Laser

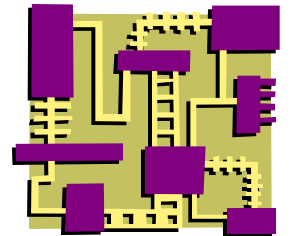
Segmentation

Permission

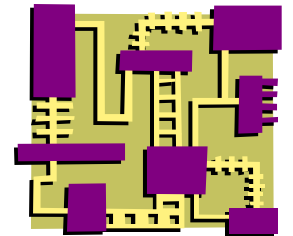
Internet

eSignatures

Insurance Kiosks



**As response
rates decline,
deploying the
brand
in direct
marketing
channels is
your next
horizon**



Brand Equity Matters



NOPAT

increasing brand differentiation

Good Times +35%
Bad Times - 4%

NOPAT

decreasing brand differentiation

Good Times +24%
Bad Times - 24%

**Insurance
companies count on
an association's
brand strength to
recommend**

**...and associations
seek out insurance
brands which
uphold their
brand reputation**

What is brand?

Name

Sign / Symbol

Colors / Fonts

Logo

Design Requirements

Tagline /Slogan

Emotional Associations

Expectations

Personality

Process

Brand Image

A unique set of associations within the minds of target customers which represent what the brand currently stands for -- **the is**

Brand Identity

A unique set of functional and mental associations the brand aspires to create or maintain-- **the should**

Brand Attributes

The functional and **emotional associations** that are assigned to a brand by its customers and prospects

Brand Personality

The brand image or brand identity expressed in terms of **human characteristics**

The creation and
positioning of
the Brand

Brand Essence

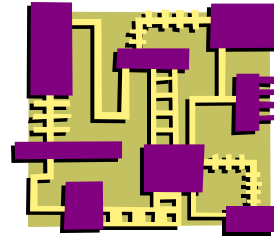
The **three to five word articulation**
of the "heart and soul" of the brand

Brand Passage

The sum of the people, processes and
communications that pay off the brand
throughout the buy cycle

The nurturing
of current
customers

The Prospect's Brand Passage™



BRAND CENTRAL STATION

The expression of
your Brand

It begins with the
brand attributes,
identity, image,
personality and the
brand environment
you have already
created...

***Practical deployment
of the Brand for
each passage,
channel and at each
point of contact ...***

BRAND TERMINAL

Your Customer
Relationship
(CRM) Strategy

...and ends when the
prospect reaches
his/her goal – hopefully,
but not necessarily,
as your customer.

Buy Cycle

Learn

Try

Buy

Use

BRAND CENTRAL STATION

BRAND TERMINAL

**The brand lives
and works
in this space**

BRAND CENTRAL STATION

Unless you help keep
the prospect on track...
you will not pay off
your brand investment

BRAND TERMINAL

BRAND CENTRAL STATION

But more importantly for
direct marketers,
unless you help keep the
brand in front of the
prospect ...

you will not pay off your
**direct marketing
investment in sales**

BRAND TERMINAL

Reflect brand keywords
facilitates the passage
shortest
most mutually
satisfying route

BRAND CENTRAL STATION



BRAND TERMINAL

Prospects don't care to see your company as you have structured or manage it...

Product Line A vs B

Sales vs Customer Service

From your prospects' viewpoint, your business is **continuous**

BRAND CENTRAL STATION

BRAND TERMINAL

BRAND CENTRAL STATION

**Your prospects don't
see the difference
between you and
your partner**

BRAND TERMINAL

Prospects stop at many *stations*

Brand
Central
Station



Brand
Terminal

Who are they and who conducts prospects on their Passage?

Brand
Central
Station



Brand
Terminal

How does the staff have to *conduct* themselves to keep prospects on their journey?

What *actions* do prospects take which signal their readiness to move on? And, what actions do staff have to take help prospects to their destination?

How much does it *cost* the prospect in time, money and effort? Secondly, how much does it cost you?

Brand
Central
Station

Brand
Terminal

Brand
Central
Station

What do you need to **communicate** each step of the way ?

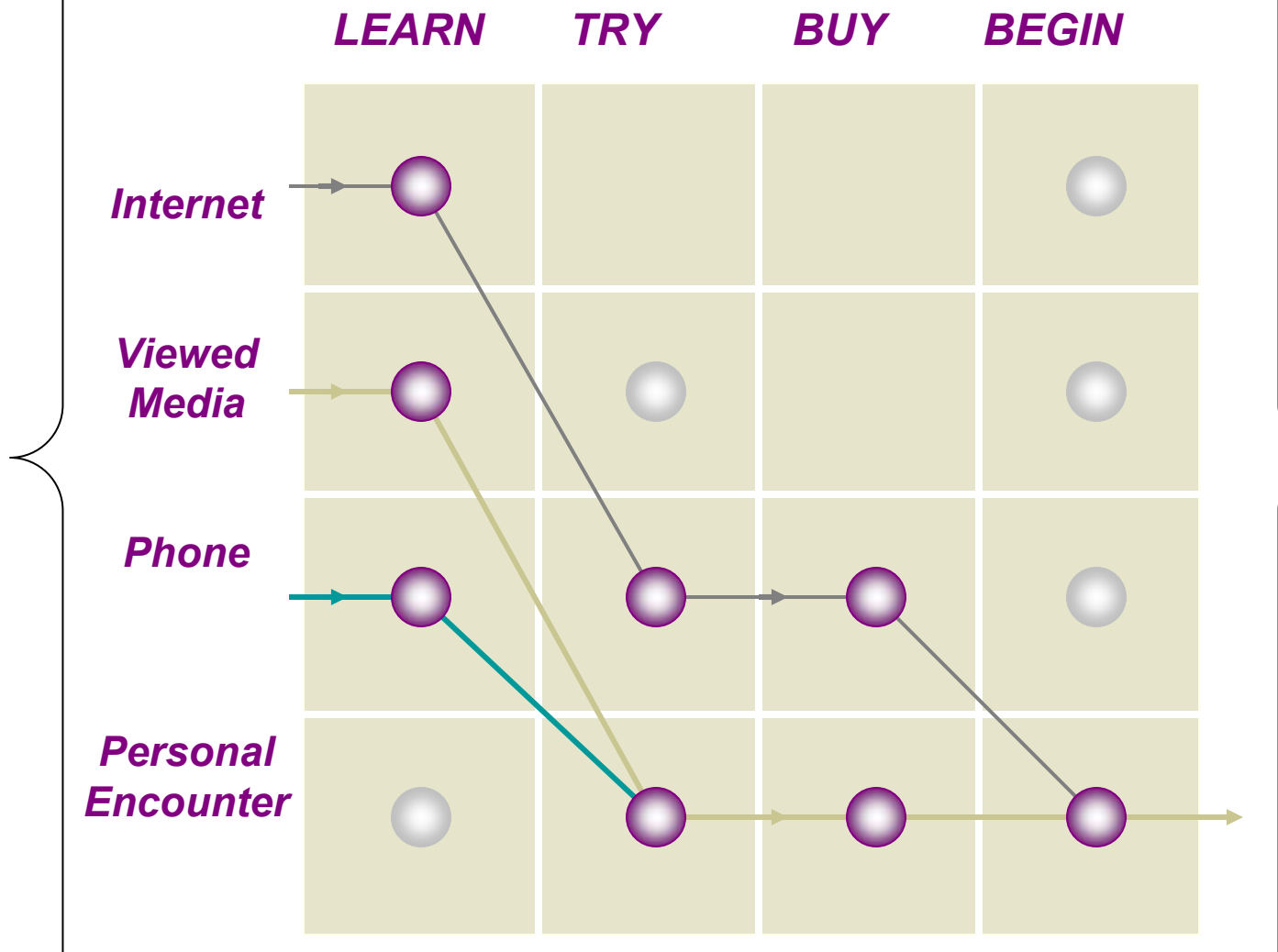
What or who could **derail** their Passage?

Do you have the same **destinations**?

Brand
Terminal

Understand the process
Answer these questions
To keep prospects on the
buy track

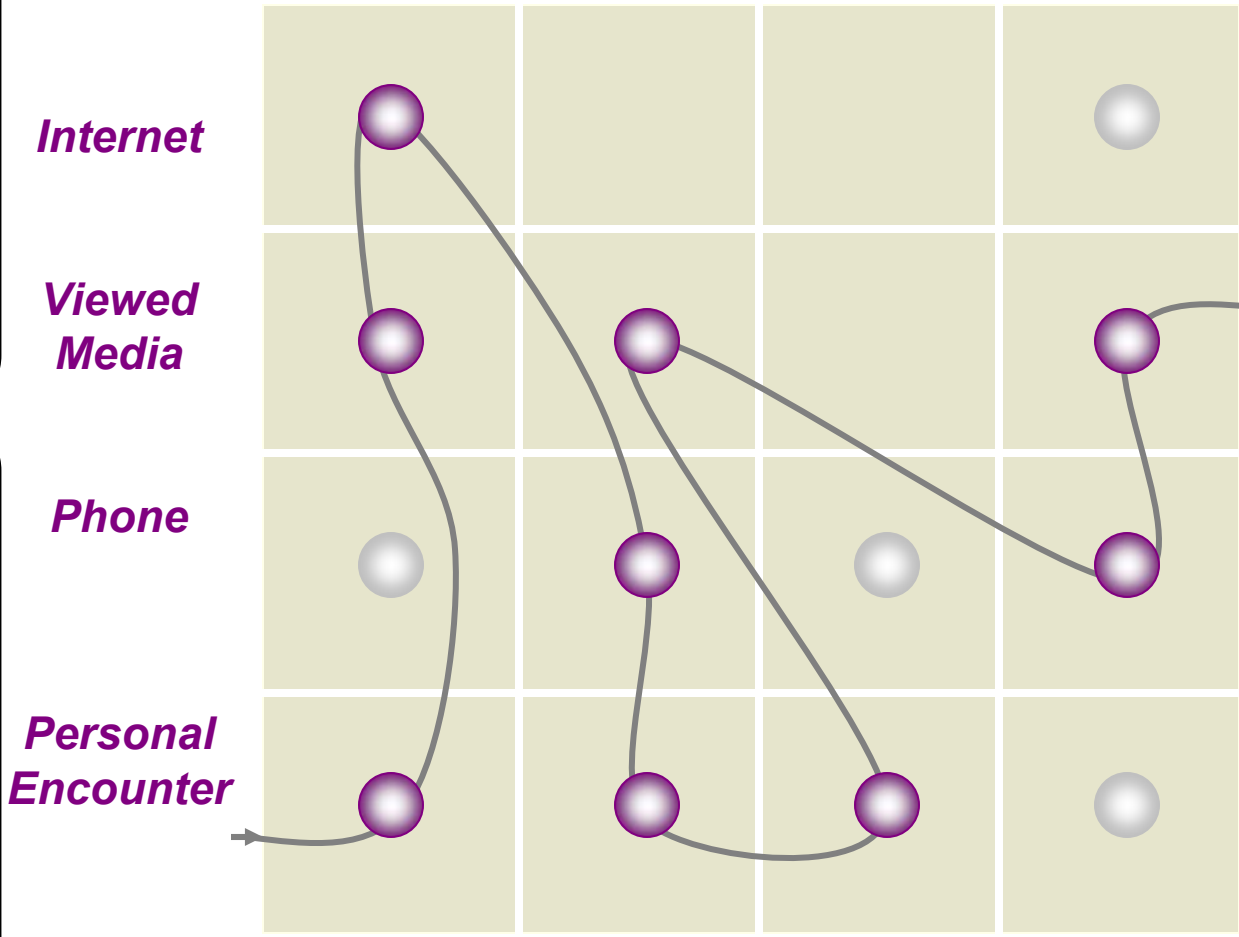
You have built stations for your Prospects...



...and have planned routes for them to travel

But Prospects define their own routes

LEARN TRY BUY BEGIN



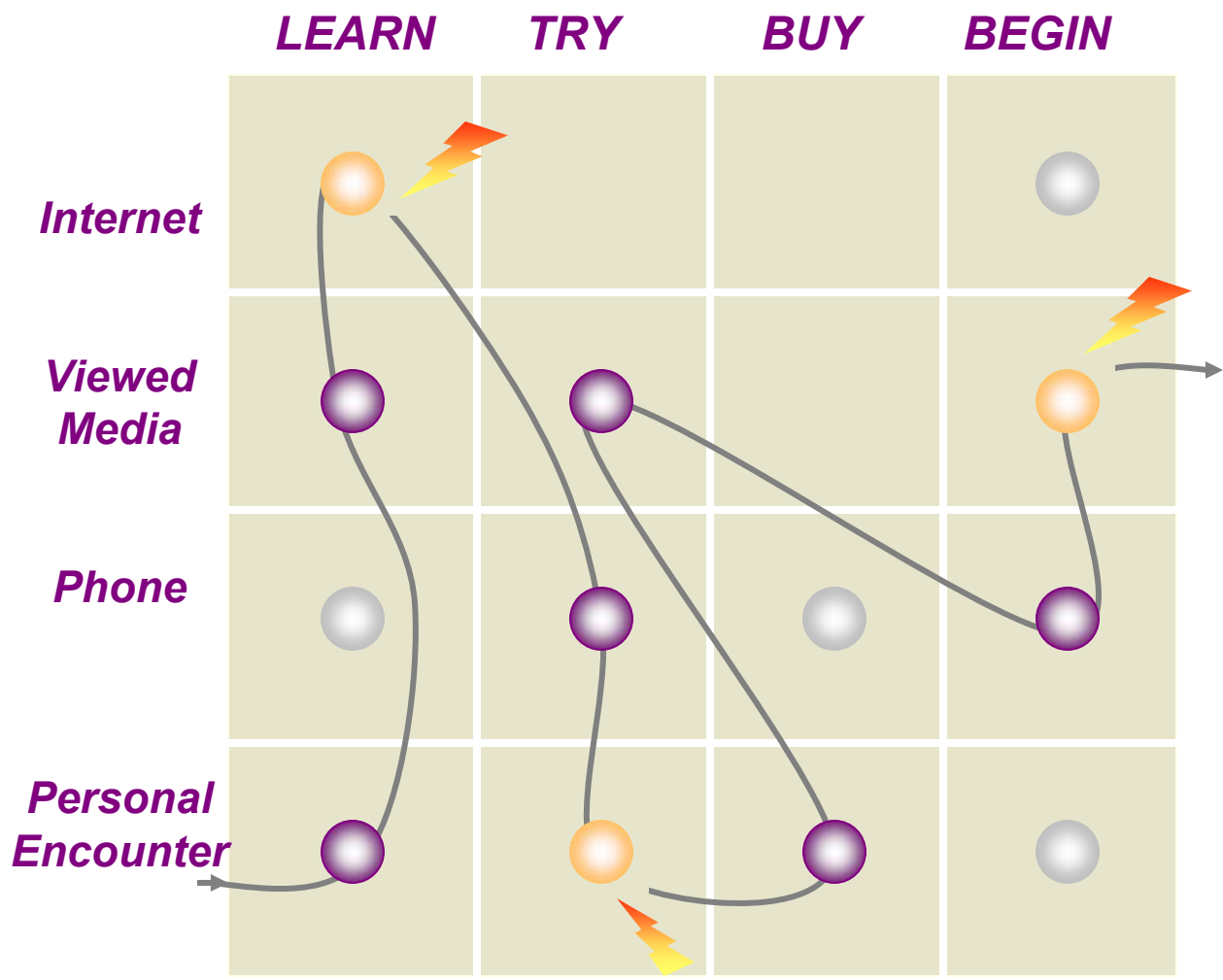
Brand Central Station

Brand Terminal

They ignore stations, change routes, jump tracks and double back

Any experience that fails to deliver the expected value can *derail* the Prospect

Brand Central Station



Brand Terminal

The How-To

describe

the current state and define the most cost-effective paths

prescribe

the tracks with the highest sales potential and best-case strategies

implement

the practical people, process, communications requirements

measure

the change in people, processes and communications effectiveness

Brand
Central
Station

Brand
Terminal

Describe

	<i>LEARN</i>	<i>TRY</i>	<i>BUY</i>	<i>BEGIN</i>
<i>Internet</i>				
<i>Viewed Media</i>				
<i>Phone</i>				
<i>Personal Encounter</i>				

Internet

e-mail
info website
e-commerce

Viewed Media

direct response
(traditional)
mail
television

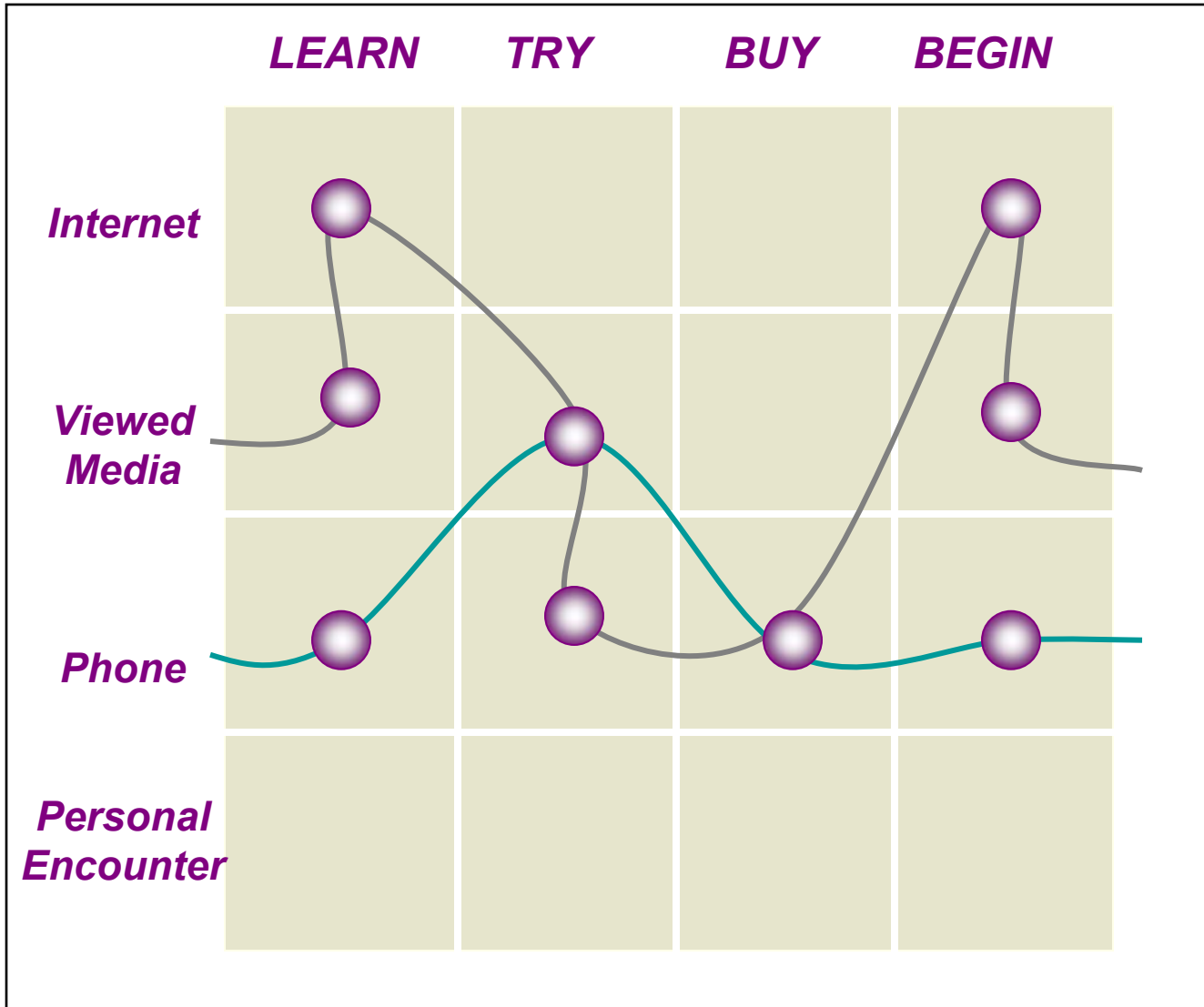
Phone

direct sales
incoming
customer care

Personal Encounter

retail location
collateral
packaging
personal service

Describe



Map all the passages for each point-of-entry channel

What are the most frequent routes?

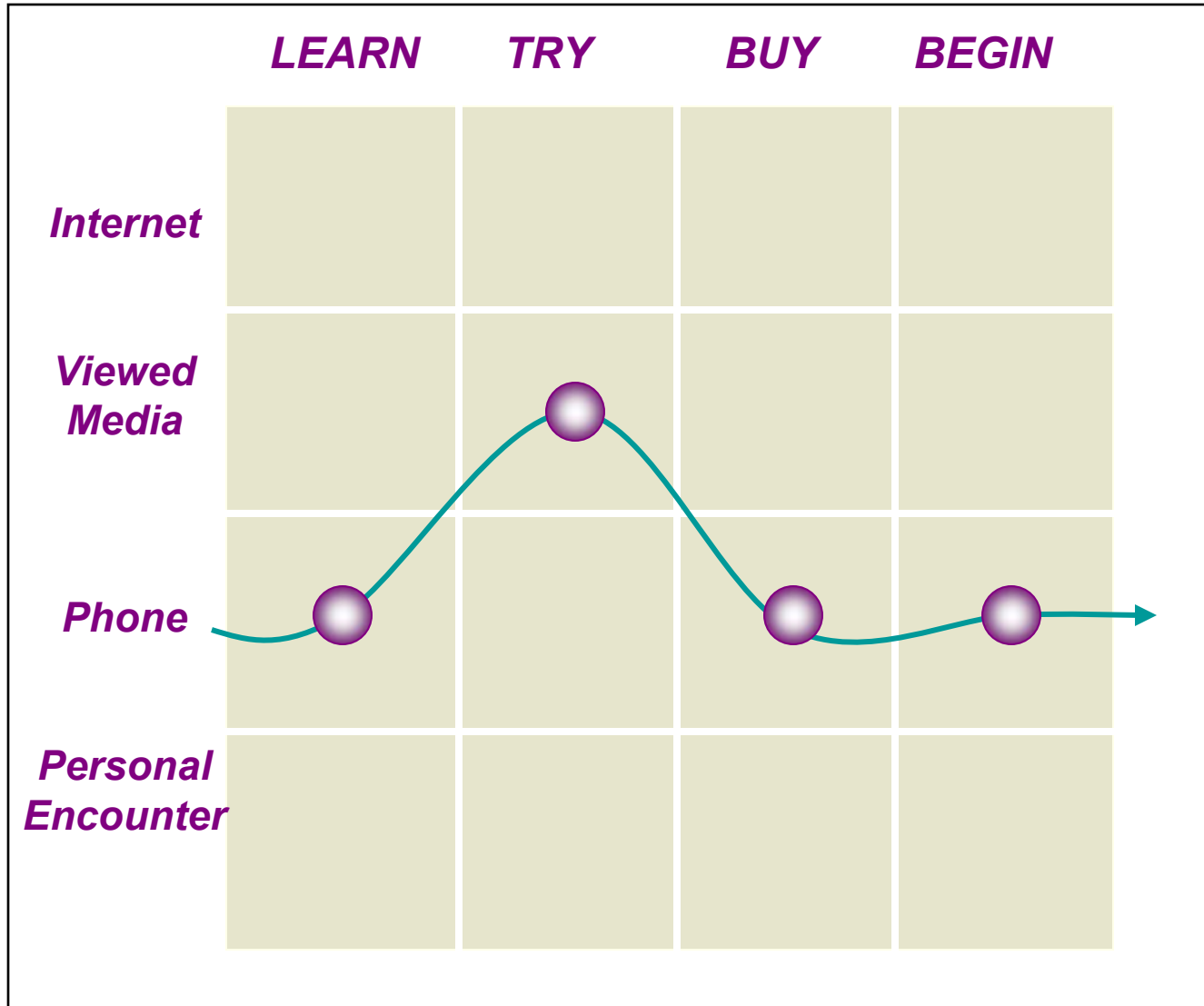
Do prospect's tend to use one of your channels to "learn" or "try" more than others?

Collect information via mini surveys

Hypothesize!
Use a proxy!
Chunk it!



Describe – The Process View



Or map just one.
Bite off what you
can chew

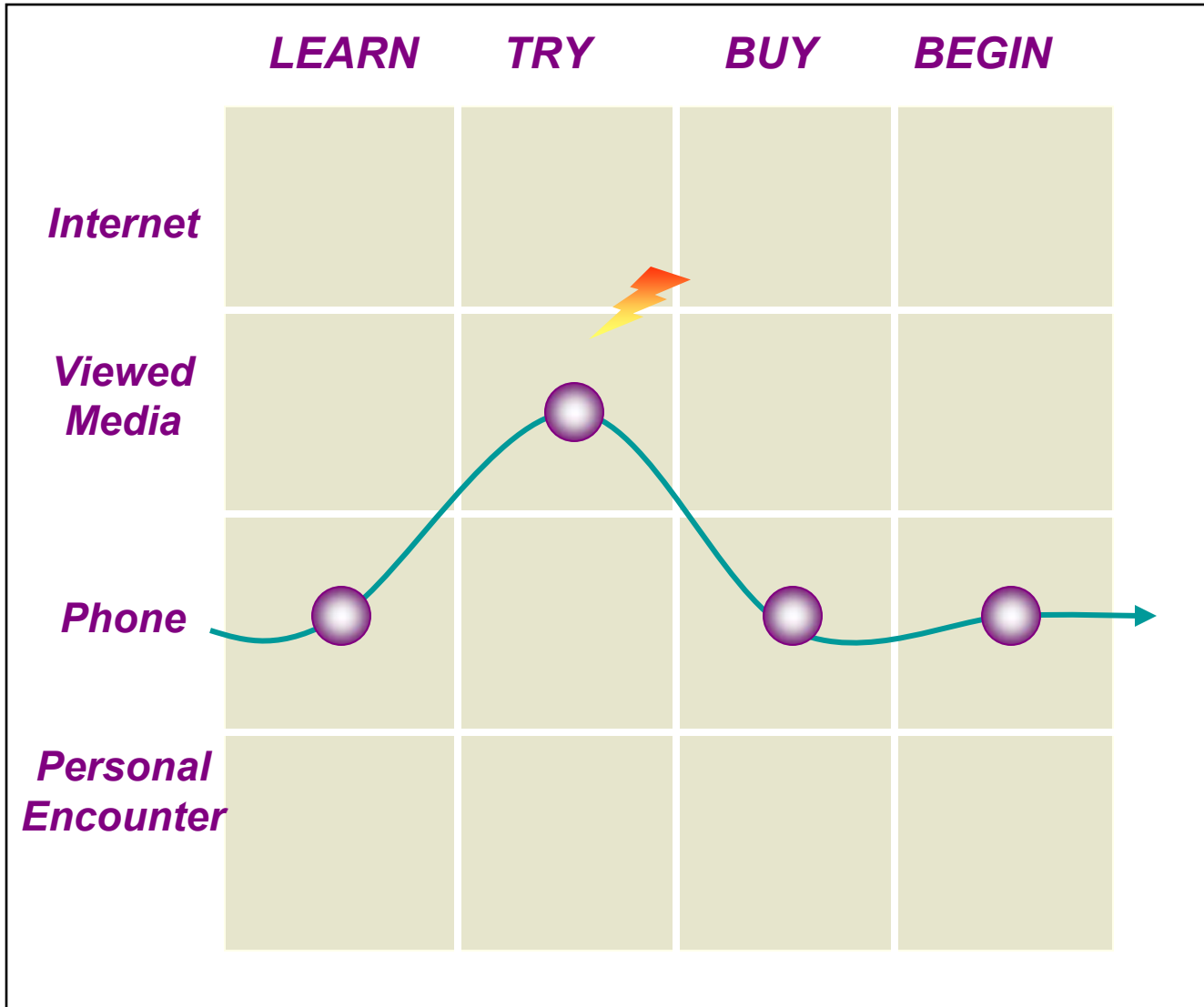
What was the
most straight-
forward for the
prospect?

How did they get
here?

How much time,
effort , \$\$ does it
cost the
prospect?

How much time,
effort , \$\$ does it
cost you? And
where do those
meet?

Describe – The Process View

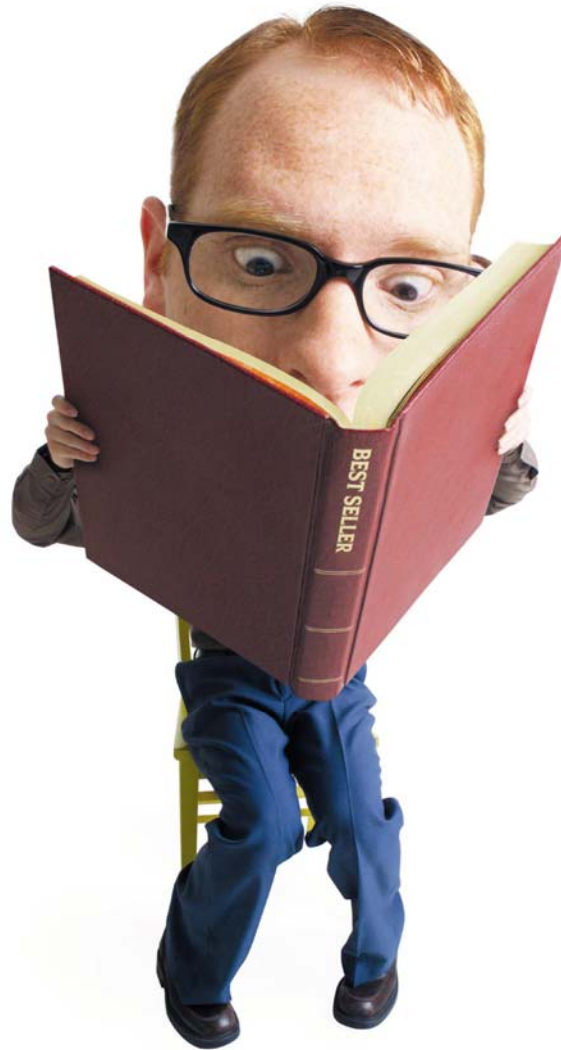


Where is derailment happening? And why?

Provides a clue to your final fix-it targets

Create a narrative of the real process

Describe – The Process View



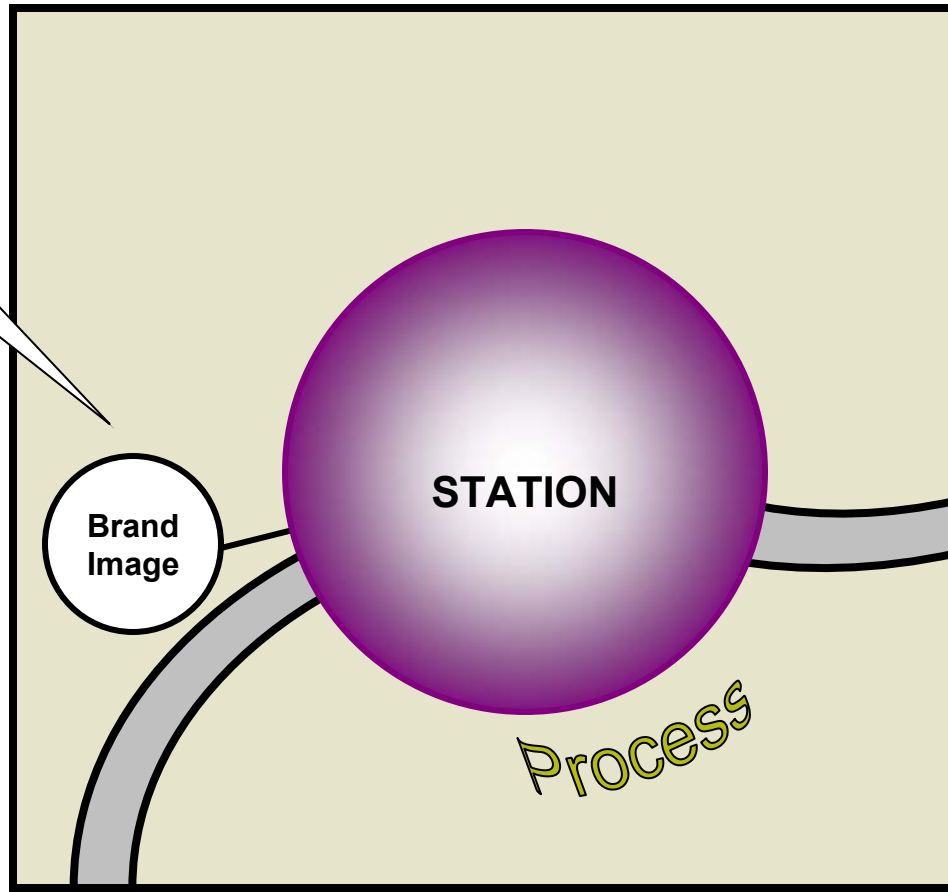
Hint

**It's not in
the manual**

Describe

Examine each station individually

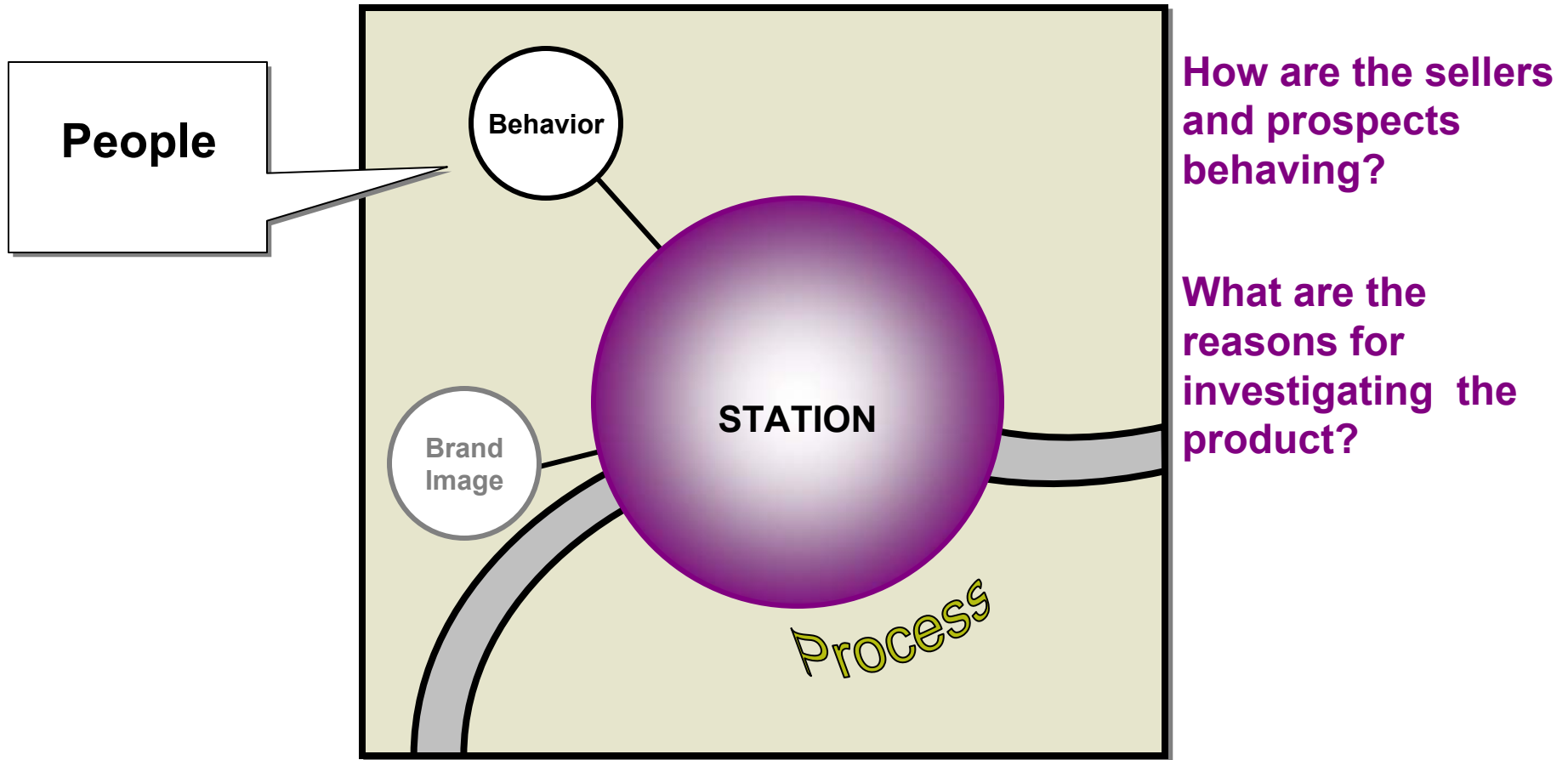
The
“IS”



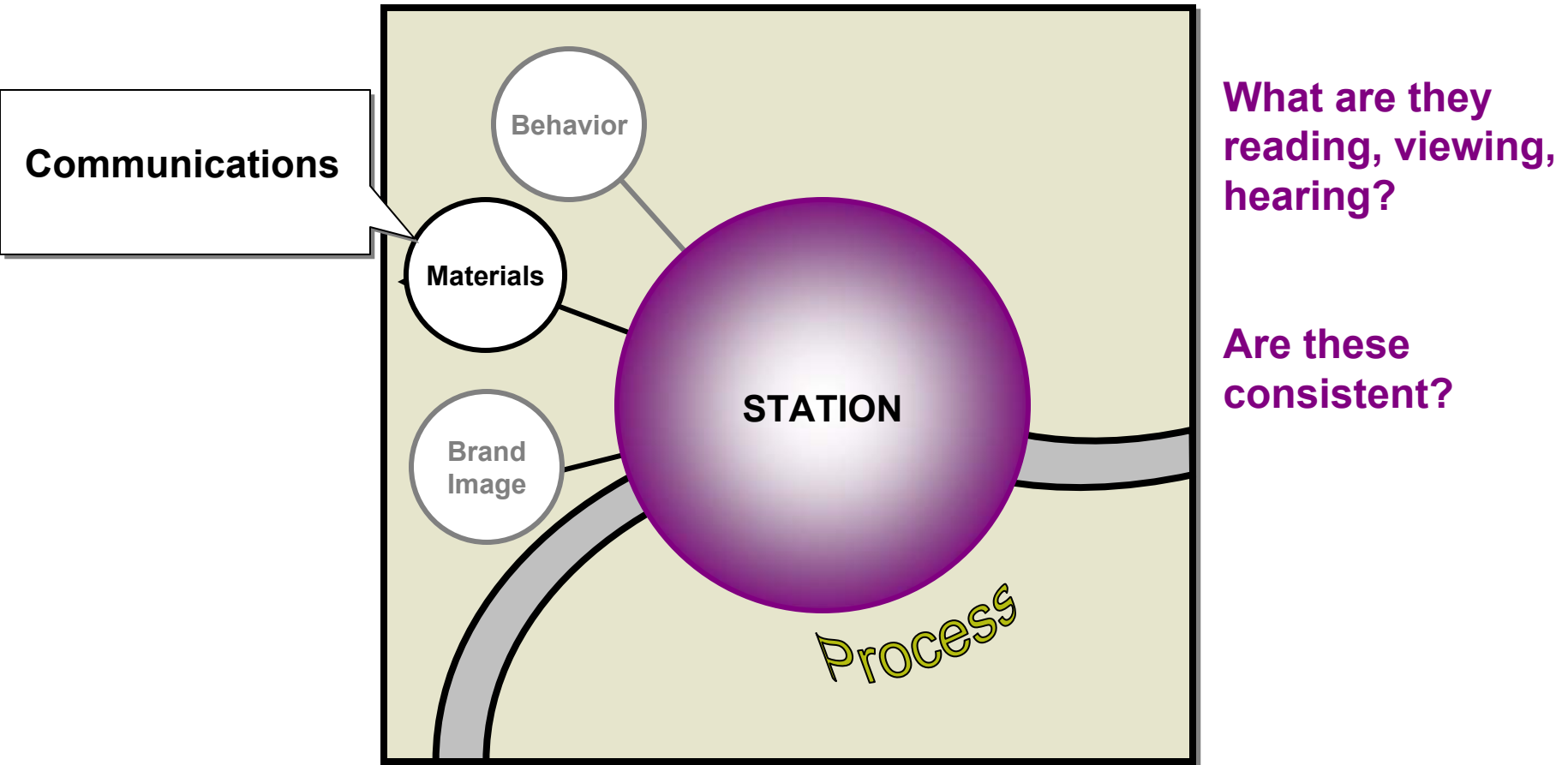
What brand characteristics can you *impute*?

Step back...
What would you say were the keywords?

Describe

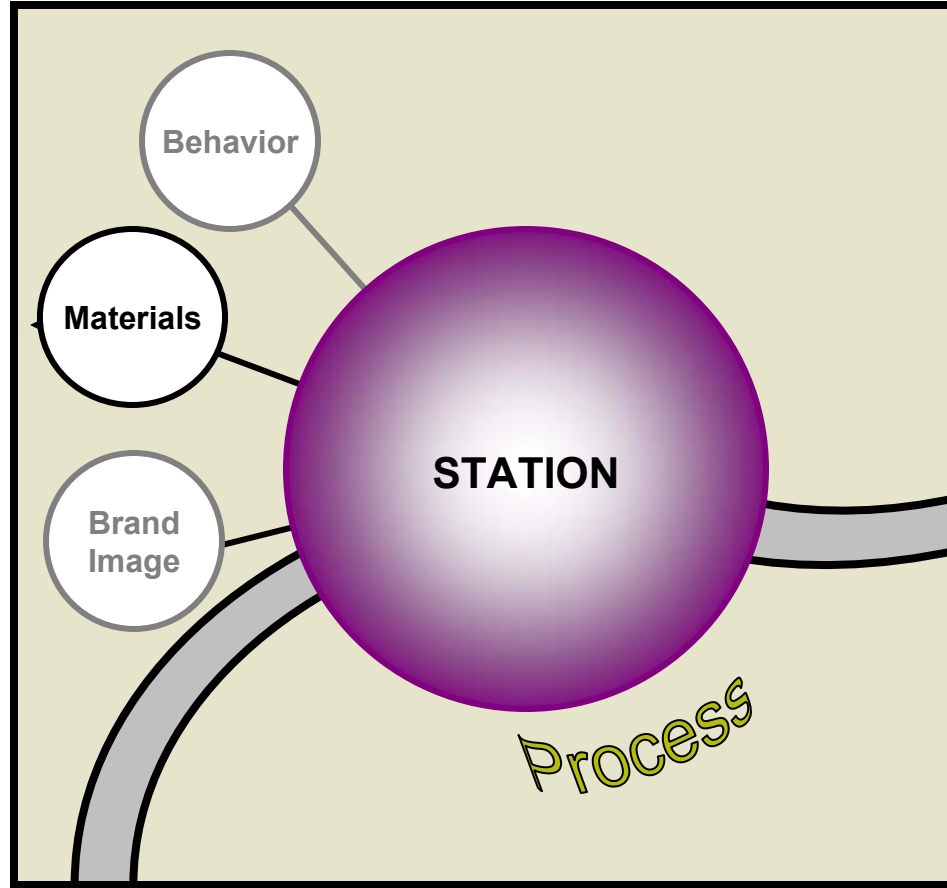


Describe



Describe

Marketing Forensics™



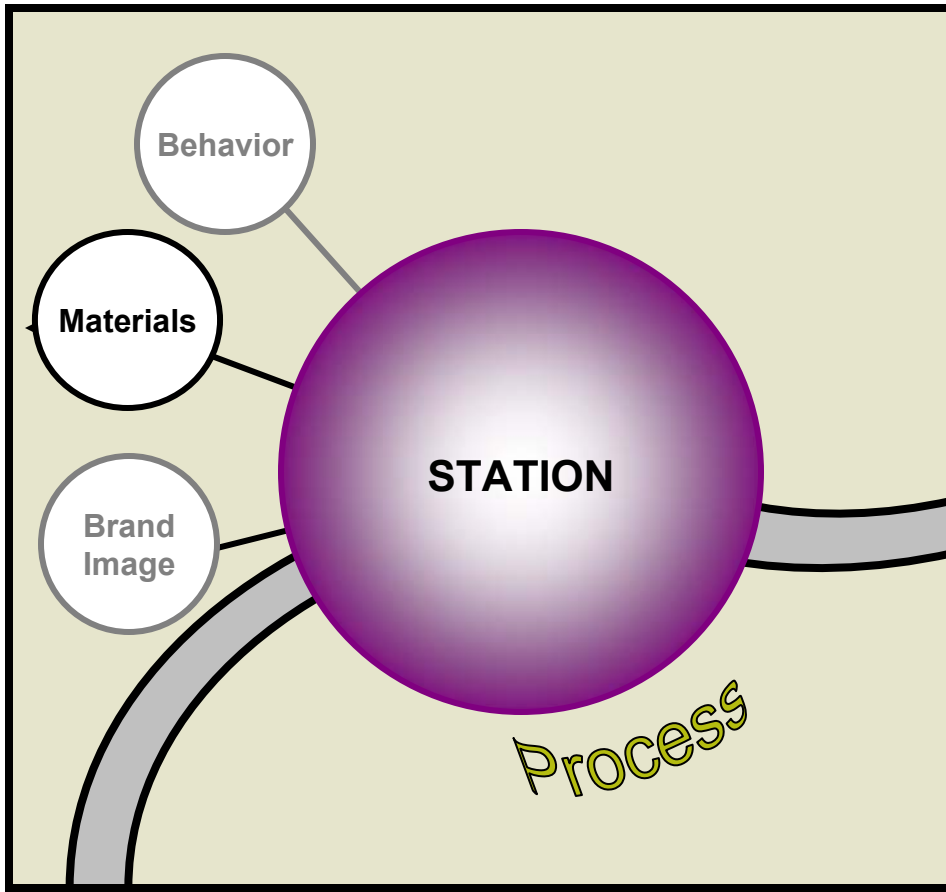
Describe



**"I believe you understood
what you think I said
but...What you heard is
not what I meant."**

Describe

Marketing Forensics™



Readability

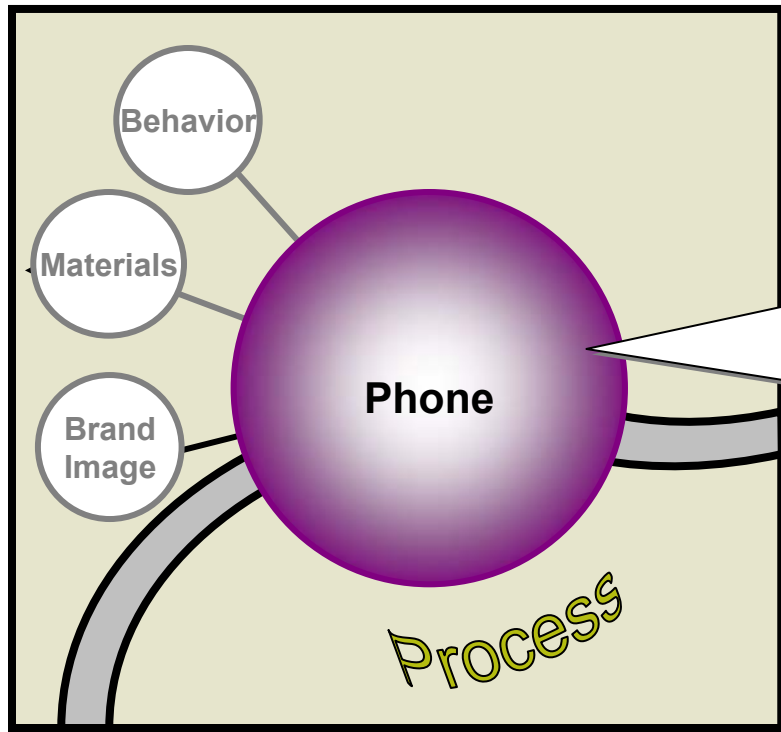
Interest

Clarity

Density

Strength

Describe



Step 2 in sales process

Accounts for 40% of the prospects

Cost per sale \$240/\$60 phone

Average time to sale 4 weeks

Average spend \$24/mo

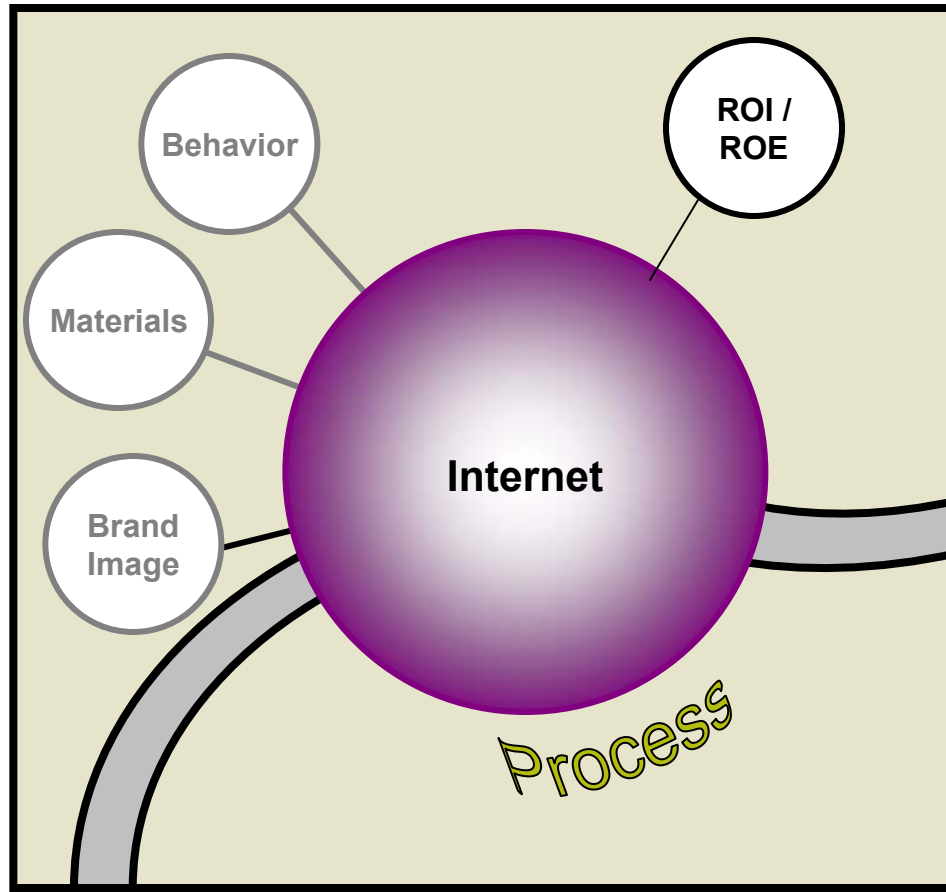
3 months in trial mode

Drive to download from site

Direct Mail; Internet

Control Script

Prescribe



**Critical
Derailment**

or

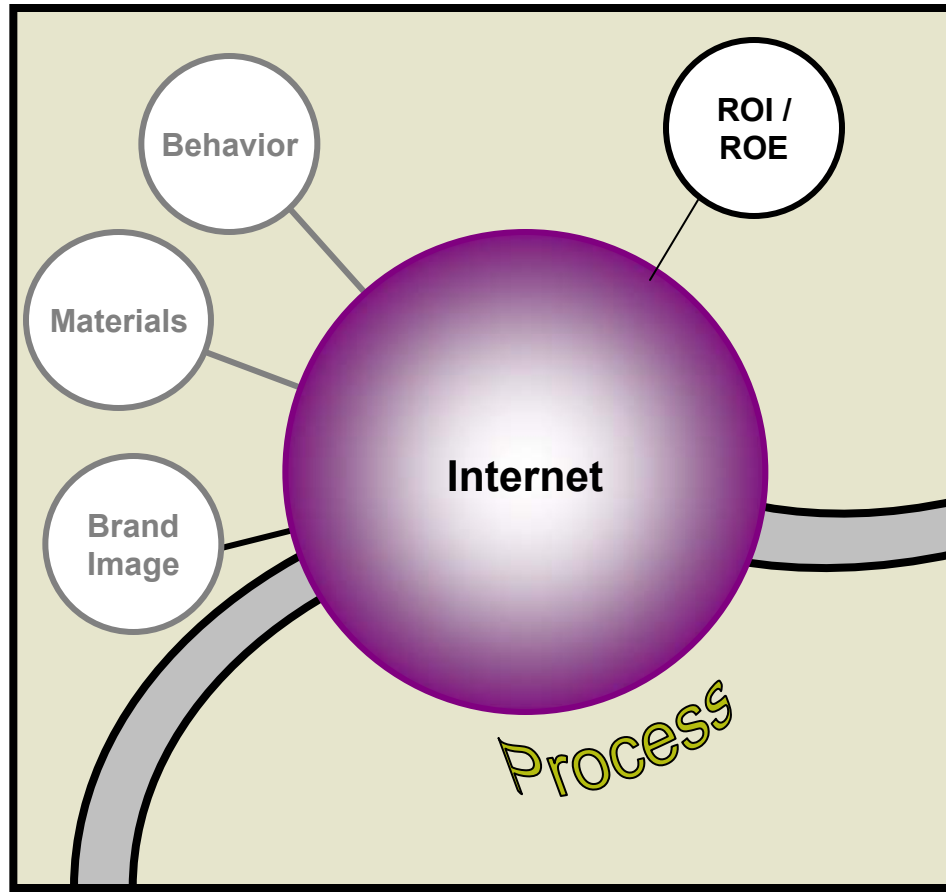
**Increased
Sales
Opportunity**

**Select paths
and stations
with the highest
potential**

**Return on
Investment
Return on Time/
Effort**

**Where would
an action justify
the investment?**

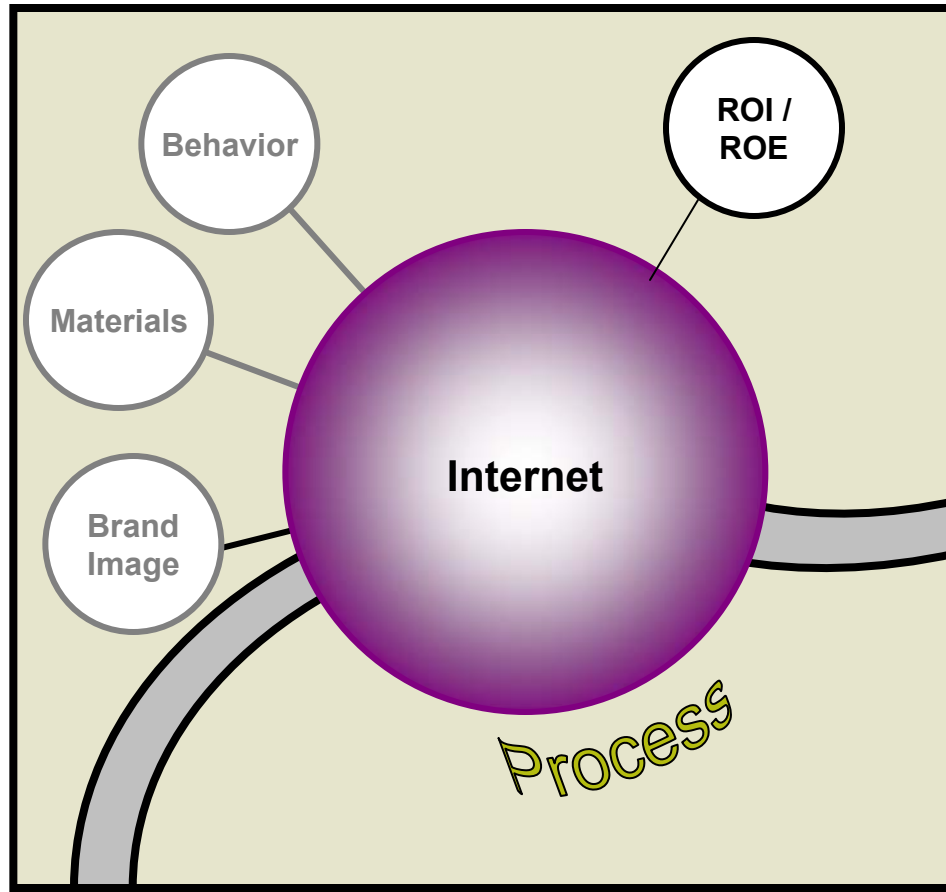
Prescribe



What skills and tools do conductors need?

Develop / revise processes to facilitate the passage

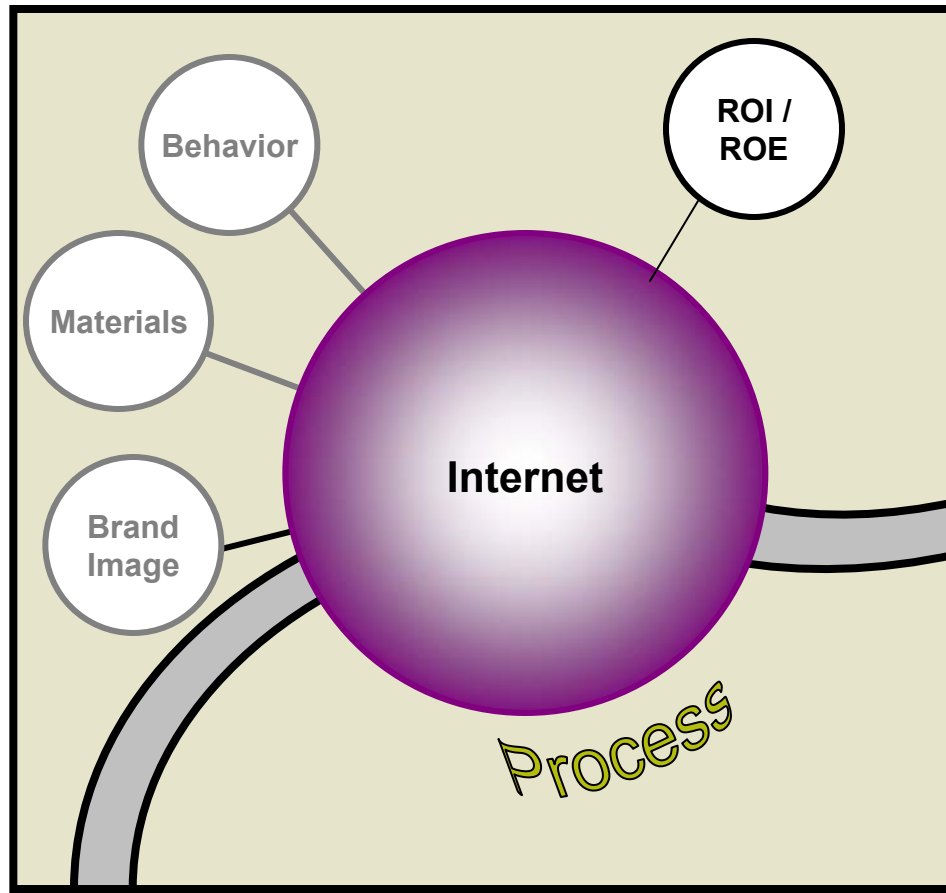
Prescribe



What is the scope of the marketing and sales aids

What are the materials standards and what are the changes needed for readability

Implement



Translate those keywords into concrete and practical actions for each station along the way

One Example

Company:

The Crimson Purple Insurance Company

Tagline:

Insurance Made Easy

Internal Mantra:

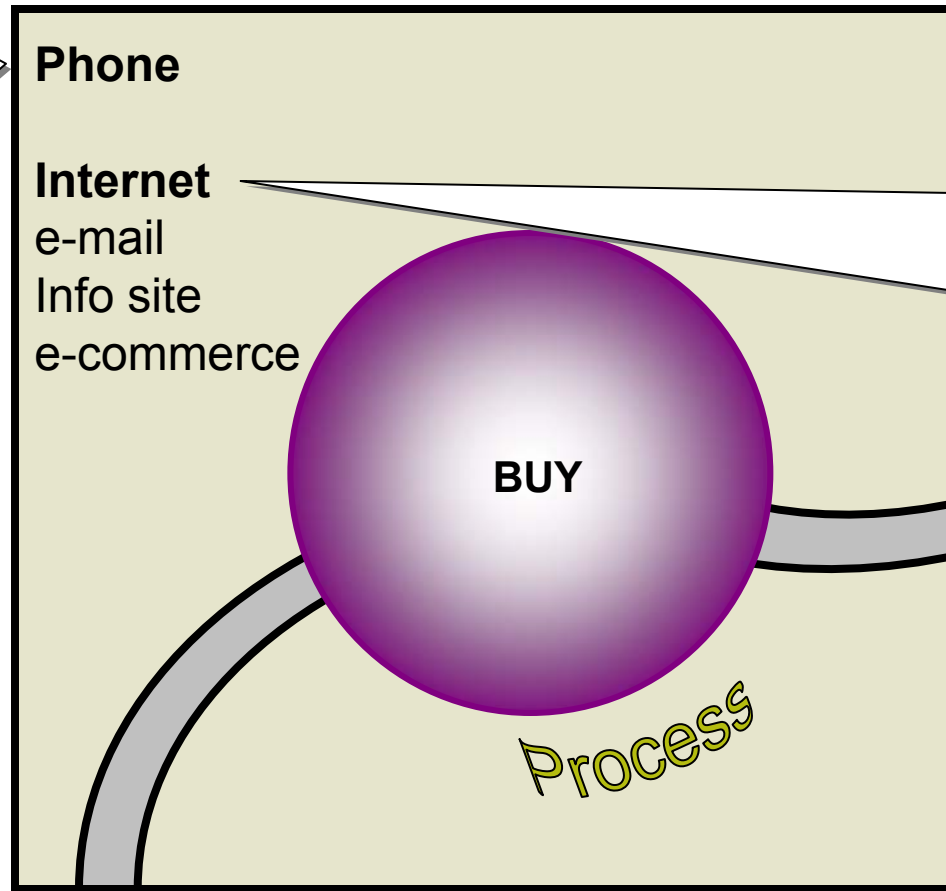
How can we make it easy today?

Keywords:

Easy, quick, safe

Playing out the Brand Keyword

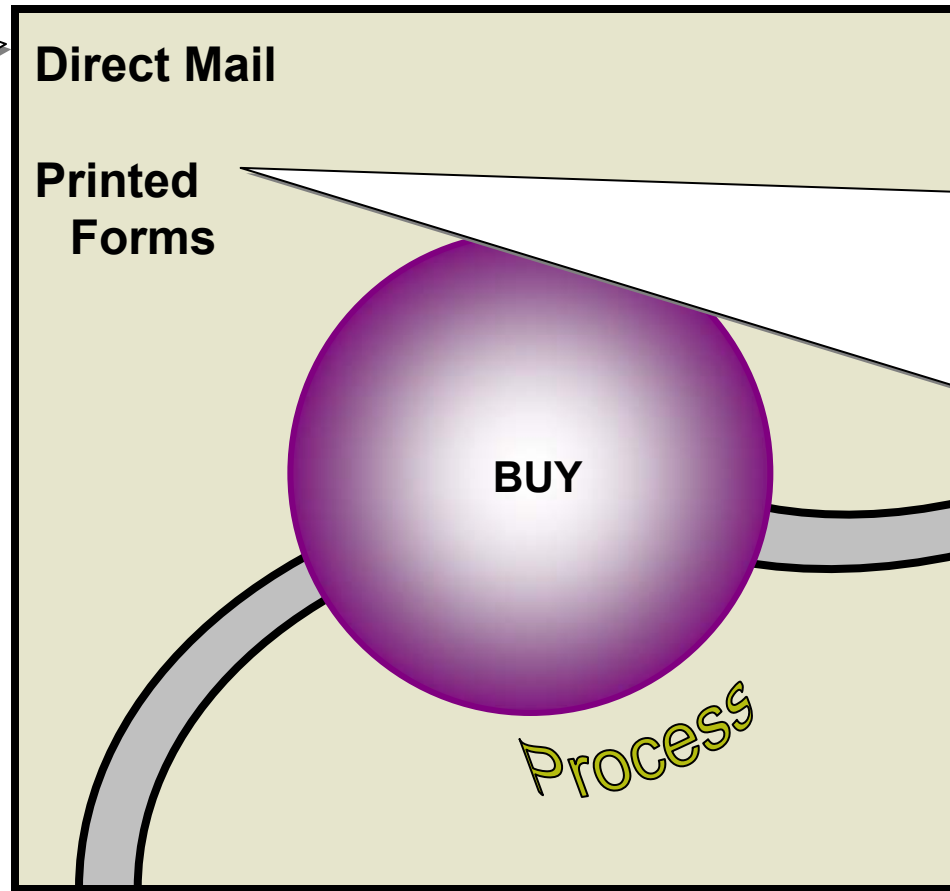
- Few Prompts
- Languages
- Speak to a human
- Number Mnemonic



- Breadcrumb navigation
- Fill-in forms
- Easy button

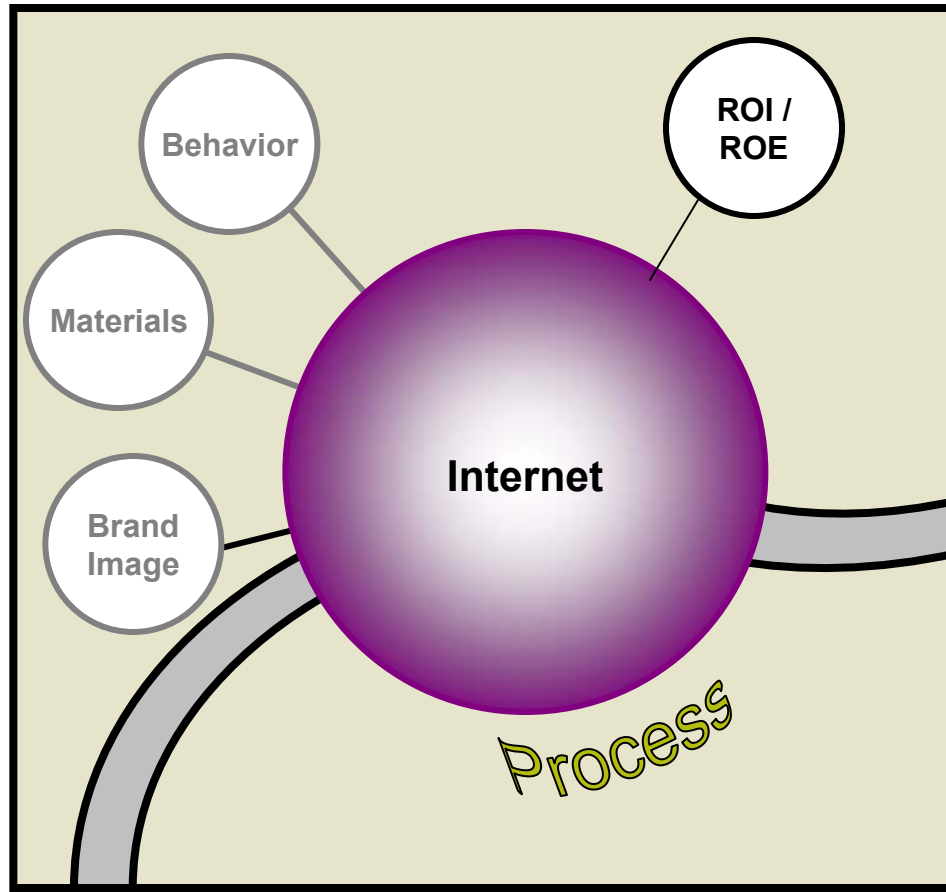
Playing out the “Easy” Brand Keyword

- Short sentences
- Short words
- No jargon



- Sample fill outs
- Personal/ phone forms help
- Reduced response times

Implement

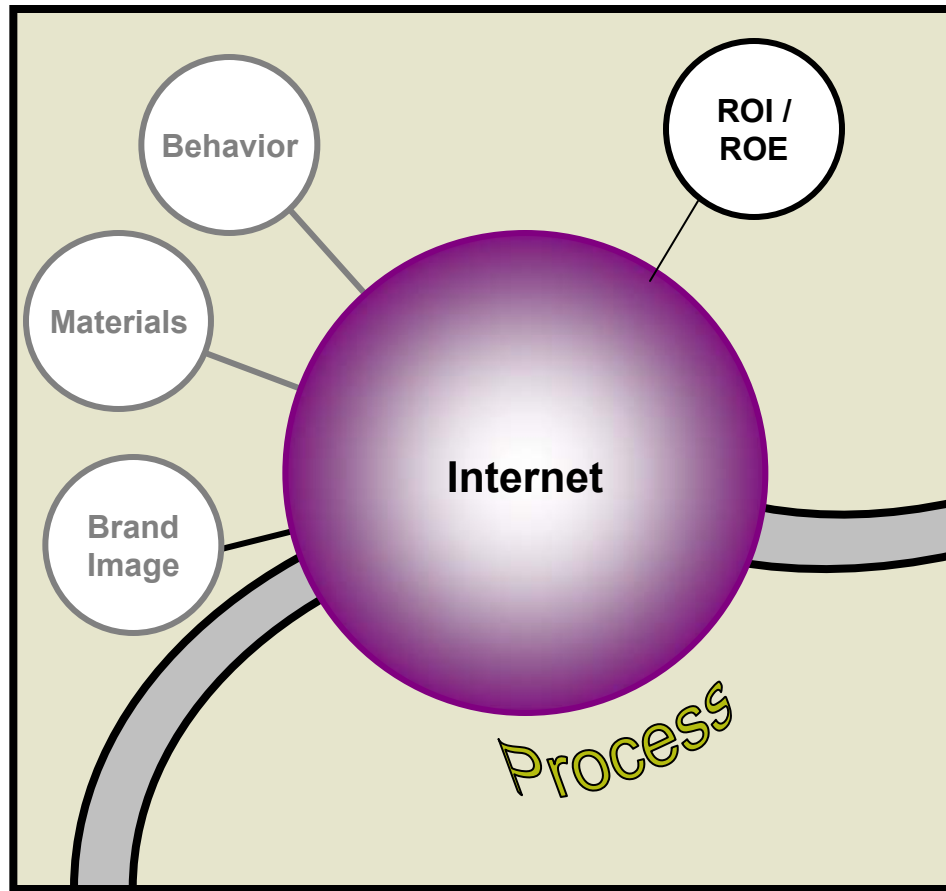


Train

**Create and monitor
procedures/
processes**

Create materials

Measure



**Define and
prioritize the
Areas for
Improvement**

**Determine the
relative weight of
each**

**Select
representative
measures**

**Calculate the
performance
gaps**

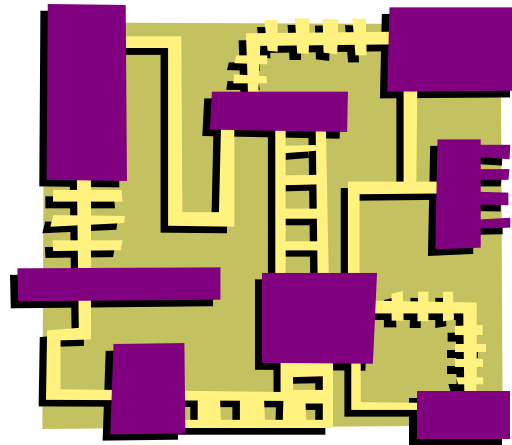
Report

Improve

“Yoh! Can I be excused.
My brain is FULL.”



Optimizing the Prospect Brand Passage™



The Prospect's View
Iterative, Step-wise, Focused
Translate Keywords into Action Items
Modular Investment
Practical and Action-Oriented
Linked to Sales Results

Describe

brand **keywords**, **behaviors**, **map of passages**, most frequently traveled **routes**, **communications** at each station and where **derailment** is most likely to occur

Brand
Central
Station

Brand
Terminal

Prescribe

the required the **skills** and **tools**, an **actionable translation** of corporate brand keywords, and the **improvement targets** with the highest, potential contribution

Implement

processes to facilitate the Prospect's Passage, personnel **training**, and **marketing and sales aids** to provide the communications prospects need by track

Brand
Central
Station

Brand
Terminal

Measure

Create a **report card** that includes yardsticks for the people, processes and communications

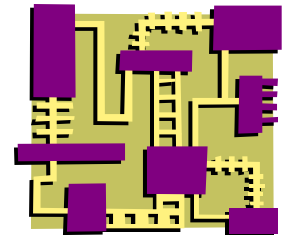
10 no-cost things you can do Monday to improve the Prospect's Brand Passage

1. *Grin and Bera it*

“You can observe a lot just by watching”
Be a camera; Get a camera

2. *Shame on you*

Create a “wall of shame” for your company,
partners and competitors



10 no-cost things you can do Monday

3. The Agatha Christie

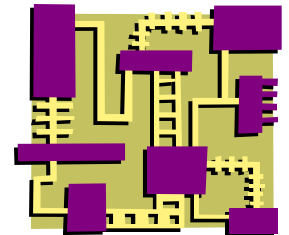
Be mystery shopper; Open an account/
buy your own product

Collect, date stamp the call backs,
fulfillment

4. The Little Red Riding Hood

Let Grandma “edit” your materials

What did they understand?



10 no-cost things you can do Monday

5. Peeved Pet

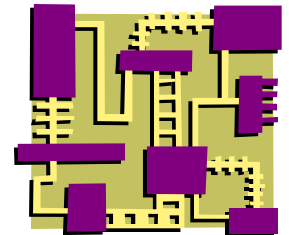
You're someone's customer, too.

Make a list of your pet peeves

Is that happening in your process?

6. Where there's a rule, there's awry

Live test your instructional/process manuals and your partner's



10 no-cost things you can do Monday

7. *New Math*

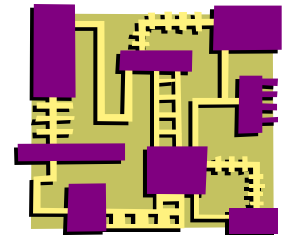
Listen to the complaints
Tally the incidences

8. *The Flesch isn't weak*

At minimum pay attention to your flesch scores for all materials

9. *More inspiration than perspiration*

Go to a casino / Disney for inspiration



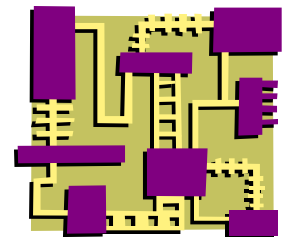
10 no-cost things you can do Monday

10. Pick up the first dish

Pick ONE keyword

Pick ONE passage

Pick ONE station



Wondering About Your Prospect's Passage?

Take the Test
www.srlinder.com

