THE HUB

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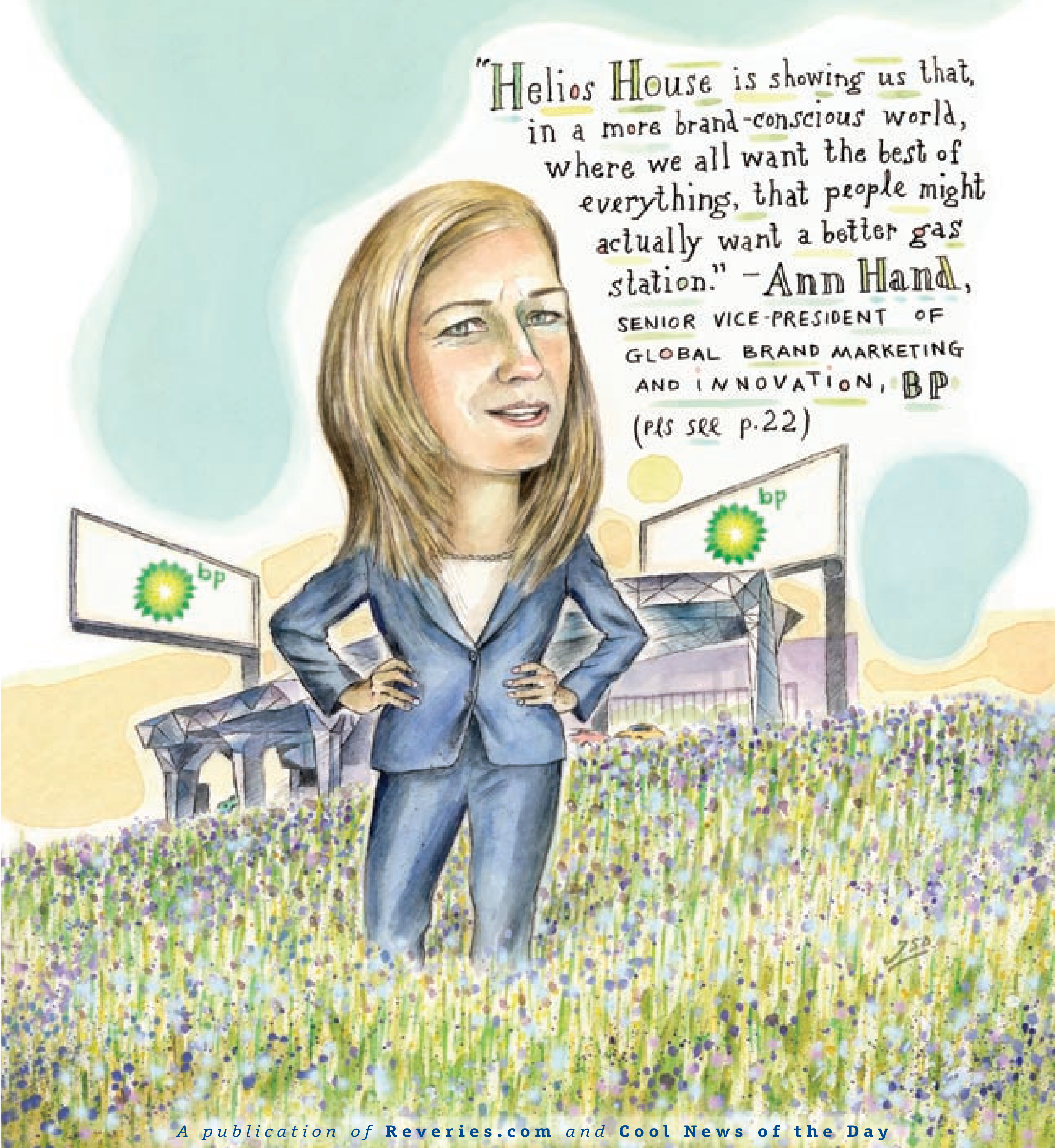

A publication of **Reveries.com** *and* **Cool News of the Day**

PIVOT POINT

Mistaken *Identity*

If there's one thing I heard while putting together this issue of THE HUB, it's that brand identity is not always what we think it is.

Brand identity can be less about big, amazing innovations than it is about small, incremental points of difference. It can be more about how well you treat your employees than it is about how much you advertise to your customers.

Brand identity is not as much about how your customers see your brand as it is about how your customers see themselves. It is more about the way your brand plays with other brands than how it plays on its own.

Brand identity isn't always what we think it is.

Even the strongest, most iconic brand identity can be copied, corrupted or stolen. Even the weakest can find its voice.

Television commercials may make a brand's image, but it's the brand experience that makes its identity. Maybe you can't judge a book by its cover, but a brand's identity is totally wrapped up in its packaging.

A brand's identity is built by listening to your customers, but not by letting them do all the talking. It's a conversation, and you are leading it. It may be trendy to say the customer "owns" your brand identity. But let's be honest about it. They really don't. You do.

What I heard while pulling together this issue of THE HUB is that there's nothing glossy, glamorous or glib about building and sustaining a brand's identity. It is hard, complicated work. But it's fun, too.

What did you hear? Please let me know: tim@hubmagazine.com.

All the best,

Tim Manners, Editor-in-Chief

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Eye *of the* Icon

When it comes to iconic status, some brands have it, while others never will.

A Roundtable Featuring

Andrea Spiegel
JetBlue Airways

Joe Tripodi
Allstate Insurance

Kellie Krug
Visa U.S.A.

Zain Raj
Euro RSCG Chicago

What are the greatest threats to a brand's identity today?

Andrea Spiegel: It's incredibly important that everything that brings the brand to life is as consistent as possible. It's when inconsistencies exist that the potential erosion of a brand's identity begins. Inconsistencies usually occur because of silos within an organization, or a lack of oversight of the brand identity.

Another threat is copycats. We protect our brand through trademarks, and are very much a watchdog in terms of what other people are doing to infringe on our space. We see it happening a lot overseas. It could be as obvious as using the word "blue" in the name of the airline. It also happens in terms of product offerings. Others will literally copy almost exactly your product offering.

Joe Tripodi: The greatest threat is a lack of meaningful differentiation — a weak value proposition, a lack of relevance or limited clarity in the mind of the consumer as to what the brand stands for. Too many line extensions can also be a problem. Some brands go into spaces that the customer really doesn't give them permission to go into.

A brand's identity has to be constantly nurtured and nourished in order to thrive. It's when companies decide to milk their brands, not invest in them or let them become stagnant, that they lose relevance and energy. That's the "doom loop" for a lot of brands.

Kellie Krug: At Visa, we spend a lot of time looking at marketing with partners. The opportunity — or threat — is how to develop those partnerships so that they deliver on the promise of the Visa brand while also delivering on the promise of the partner brand.

Other challenges involve new communications channels, and figuring out when your customer wants to be reached and with what kind of message. How our brand identity comes together for an individual consumer is a rich place to explore in terms of becoming much more targeted and relevant in the marketplace.

Zain Raj: One of the greatest threats is the fundamental shift in the pace of change. Right now, the pace of change is so fast that if I were to drive some level of innovation, somebody else will be out there within 60 to 90 days with the same thing and I will have no point-of-difference anymore.

As a result, a huge amount of commoditization is starting to occur across every category. This commoditization is leading to a high degree of homogenization, which is eroding brand identities. This lack of meaningful innovation makes it very hard for a brand to stand apart and sustain a competitive advantage.

How much control should consumers have in shaping brand identity?

Spiegel: The JetBlue brand identity was built so quickly because of word-of-mouth, which shaped who we are today. So, we welcome an open dialogue with our customers. If we're hearing a universal belief or suggestion, we will take it very seriously and make changes based on it.

However, there is a bit of a danger in giving consumers too much control because, at the end of the

> ***The beauty of Allstate's brand identity has been its consistency.***
>
> JOE TRIPODI

day, you have to run your business the way that it needs to be run, based on your expertise.

Giving customers control doesn't mean that they should necessarily create your advertising. In fact, I think that the more we see that happening, the less of an appetite there's going to be for it.

Tripodi: Fundamentally, the consumer should have some control in shaping the brand identity. But clearly the consumer is not going to be creating a communication strategy. The marketer has to lead that strategy based on consumer insights and by listening to the consumer constantly.

Utlimately, the consumer is going to be rooted in the foundation of what the brand stands for, and that's what the marketer needs to communicate. Where some brands get into trouble is when there's a huge gap between your stimuli—the marketing communication—and the actual customer experience.

Krug: Visa recently embarked on a mobile-phone pilot with PacBell Park in conjunction with the San Francisco Giants. The idea was that consumers would use their mobile phones to take pictures of themselves or their friends using their Visa cards within the park. Then they sent us their photos via their mobile phones and we posted them throughout the game on a jumbo screen.

It was really interesting for us to think about this program as a way to bring the Visa brand to a very specific group of cardholders within the confines of the park. It engaged consumers at a different level, while also supporting our underlying business strategy of having a Visa product be part of a transaction.

Raj: It's a very ironic question that comes out of the old-world arrogance of traditional marketing. The fundamental belief has been that if you advertised your product, you could build a brand's identity through awareness alone. But that's never really been true.

A brand has never been anything but a relationship that consumers have with a product or service that fulfills a need in their lives. Consumers have always had the power to define what brands are going to stand for, and what role the brand is going to play either in their lives or in the context of the marketplace.

If you think about it, 100 years ago, brands were built by consumers talking to each other. Today, the internet and other technologies allow consumers to engage in that kind of conversation again, and the brands that succeed will be those that give them as much of an active role as they used to have.

Is advertising still as important as it once was to a brand's identity?

Spiegel: I absolutely think advertising is as important as ever. The interesting point here is the different forms advertising takes today. There are so many more options—and so many more channels—that advertising has become much more complicated.

In addition, with so much content now in the hands of consumers as opposed to the marketers, there is a lot less control over the message. But if your brand stands for something, and your customers get it, then they are going to talk about you in that same voice. It's almost a self-fulfilling prophecy.

> ***The JetBlue brand identity was built so quickly because of word-of-mouth, which shaped who we are today.***
>
> ANDREA SPIEGEL

I do think advertising has become more complicated and we have much less control over what that message is. That makes it more important to keep the message simple—the simpler the message and the more true we are to our brand and what we stand for, the more effective our communications are going to be whether they are marketing-led or consumer-led.

Tripodi: I think advertising is just as important. Advertising helps us create a consistent message and tone that we can control. It allows us to imbue the brand with continued relevance. It allows us to seed in differentiation and speak to new products or services.

We also shape the brand's identity through sponsorships, promotions, the retail experience—and through our bills. It doesn't matter if people saw a great television commercial if they then get a bill in the mail that's wrong or if they call us and the phone's not picked up for two minutes.

The real challenge for marketers is to navigate between message, media, consumer segment, geography and time. If you can thread that needle consistently, you will find that the return on your marketing investment is going to be substantially higher than if you're just engaged in "spray and pray."

Krug: Advertising is still important as a very effective way to reach broad groups of people. What we're seeing at Visa — and what a lot of other people in our category are looking at — is whether there are other ways to reach people. There's a much broader sphere of choices to consider when we think about integrated marketing.

Not only are we discussing our options much earlier on, we're also much better informed because of some of the work we've done. We have a better understanding of the effect of an online or an interactive effort, for example.

A couple of years ago these newer options were an after-thought, and based on advertising. Now, we have a lot more data and insights in terms of what combination of activities is going to be the most compelling, based on our business needs.

Raj: Advertising will continue to be an important part of building brand identity, but it's not necessarily as important as it used to be. Advertising is just an invitation to a brand experience. Like an invitation to a party, it sets an expectation, but the brand is not built by its advertising alone. The brand is built by the experience you have with it, the need it fulfills for you, and how well it fulfills the need versus its competitors.

Advertising will have a role for a while because television still happens to be a fairly cost-efficient way of getting broad reach. It also is a way to communicate the evocative nature of the message. Will the channels change? Yes. Are we moving from mass to more targeted approaches? Yes. Is more targeting allowing us to get the mass reach? Not yet. Will it ever? Sure.

What is the role of retail in brand identity?

Spiegel: When we talk about retail at JetBlue, we're talking about price and how to put special offers into the marketplace in a way that's consistent with our brand. We call that "branded retail."

When we talk about the "JetBlue experience," we're really talking more about the brand in total. We're talking not only about retail but every touchpoint — from discovering us in advertising to booking us online to calling our reservation agents to the time you pick up your bags when you get to your destination.

Tripodi: Retail is really the ultimate manifestation of what your brand stands for. It's the "moment of truth" for the brand. Allstate has more than 13,000 agency owners around the country, and the brand needs to live in those offices.

> ***Retail is where brand identity really comes together for Visa.***
>
> KELLIE KRUG

Ultimately, the retail environment is your most obvious opportunity to control what the consumer sees and what they experience. Retail shapes the reality of the brand's identity, whereas marketing communications through traditional media channels shapes the perceptions.

Krug: Retail is where brand identity really comes together for Visa. When we think about retail, we think about one of two things. One is, we continue to open up new channels of acceptance at places like toll-booths, taxicabs and quick-service restaurants.

We also look at retail as a co-marketing opportunity. We have a lot of incredible partners who play solidly and squarely in the retail space — Marriott, Starbucks and Target, for example.

We really try to maximize the deep partnerships that we have with these retail brands to create a lasting and memorable consumer experience. That often manifests itself in a rewards program or in a promotional capacity.

Raj: Retail is a huge component of any brand identity. A brand doesn't get built unless there's a relationship, and a relationship doesn't happen until you have an experience with each other. A brand really gets built when a consumer has the ability to touch, feel, use, experience and enjoy the brand to its fullest potential.

Consumers have that ability within the context of a retail environment. What happens on the shelf — how the brand is displayed, what position it plays on the shelf, how much or how little it gets promoted — defines the context of the experience the consumer has with the brand.

> ***Advertising will continue to be an important part of building brand identity, but it's not necessarily as important as it used to be.***
>
> ZAIN RAJ

So, retail plays a tremendous role within the context of how brands are seen and used, and what roles they play in people's lives.

Why don't more brands have identities as strong as yours?

Spiegel: Because JetBlue is seven years *young*, we were able to create an airline from scratch that is a brand at its core. Everything from the product to the uniforms to the training to the advertising—it all came from David Neeleman's vision of bringing the magic back to air travel.

So, everything was born out of the same voice and the same vision. Because we started from that place, everything evolved from there in a very consistent way, and in a way where everything comes back to the brand. I truly believe that's why JetBlue has been successful and why we have such a strong brand.

Tripodi: What's key for Allstate is that we've got to continually be relevant and re-invent what being in "good hands" actually means. Interestingly, this year Allstate celebrates its 50th anniversary with Leo Burnett as our agency-of-record. That doesn't happen nowadays.

We all know that when new CMOs arrive, the first thing they do is change the advertising and the advertising agency. The beauty of Allstate's brand identity has been its consistency, which is at the level of our tagline—*You're in Good Hands*—as well as the hands symbol itself, which is quite iconic. The imagery has evolved to look more contemporary over the years, but the message hasn't changed.

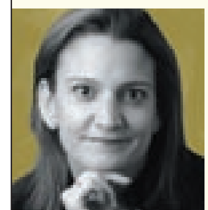
Krug: We've had a lot of really smart marketing people working on the Visa brand for a long time— close to 20 years now. The Visa brand is also incredibly relevant, numerous times of day, to lots and lots of people. It enters your life in the morning when you stop to get your cup of coffee and a bagel, when you get gas for your car, or go online to buy a special gift for someone.

There aren't many brands that have that many touchpoints, multiple times a day, with millions and millions of people. It's also a very aspirational brand because you can do things you never thought possible. Visa can help you if you're a small-business owner who needs equipment, or someone planning an exciting trip. And it spans everything in-between.

Raj: Over the last few years, Allstate has actually launched an approach that represents a very meaningful consumer innovation. Think about the way they've structured the coverage—Accident Forgiveness—where if you drive safely, your deductibles are lower. This type of consumer-driven innovation is allowing Allstate to be seen as a brand that is valued and that has a stronger identity.

JetBlue is the same way. They've created an innovation in the travel category, which is increasingly full of parity products. They've won distinction by offering services that you otherwise wouldn't expect from a so-called discount carrier.

The only way you differentiate and innovate in a relevant way is if you are consumer driven. You have to believe that it's not you who owns the brand; it's the consumers who allow you the opportunity to define what the brand needs to be. If you approach it from that standpoint, you can't go too far wrong. ■



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The *Power* of **Packaging**

By Jason Press

G2 Branding and Design

In most cases, marketers think that retail is “a good place” to build a brand’s identity. Eighty-three percent of those responding to a *Reveries.com* survey said so.

That’s not terribly surprising, given that retail is where brands are bought and sold — where consumers turn into shoppers and brand identities meet their bottom lines.

Cleaner and simpler is better when building brand identity at retail.

If the retail environment is not a good place for a brand’s identity to rise and shine, it’s hard to imagine what is.

Unfortunately, as we all know, retail is not always the friendliest of places. As many of the survey respondents noted, stores tend to be cluttered and retailers often have priorities other than promoting anyone’s brand identity but their own.

In fact, only 12 percent of the respondents said retailers were “helpful” when it comes to supporting a manufacturer’s brand objectives. Thirty-one percent said retailers were a “hindrance.” Forty-one percent said retailers were both a help and a hindrance!

The question is what to do about it. Obviously, that’s a question with some complexity to it, but one survey respondent put it very succinctly: “Brand identity on the package is the most important space to own. The retailer can’t touch it.”

It’s a great point, and one that was supported by an overwhelming majority of those taking the survey — 77 percent confirmed that “packaging” is the tactic that has worked best to support brand identity at retail.

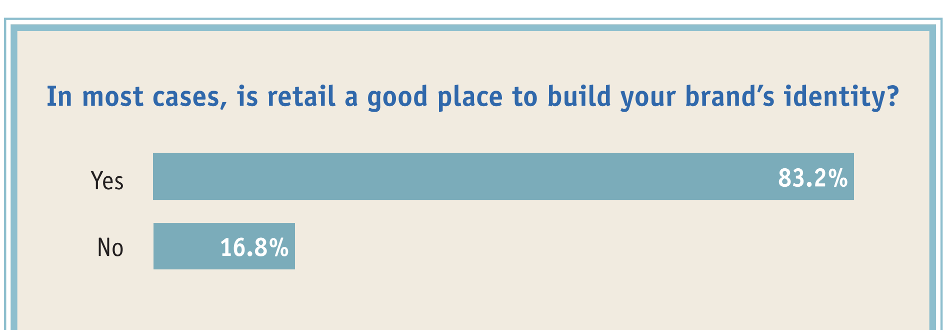
The power of packaging at retail certainly is formidable. One of my favorite examples of that power is AeroBed, which actually used its packaging to transform its business at retail.

Anyone who has ever slept on an AeroBed inflatable mattress knows what a high-quality product it is. But that fact was hidden from consumers by low-quality packaging and marketing communications — not surprising because late-night television was AeroBed’s main marketing channel.

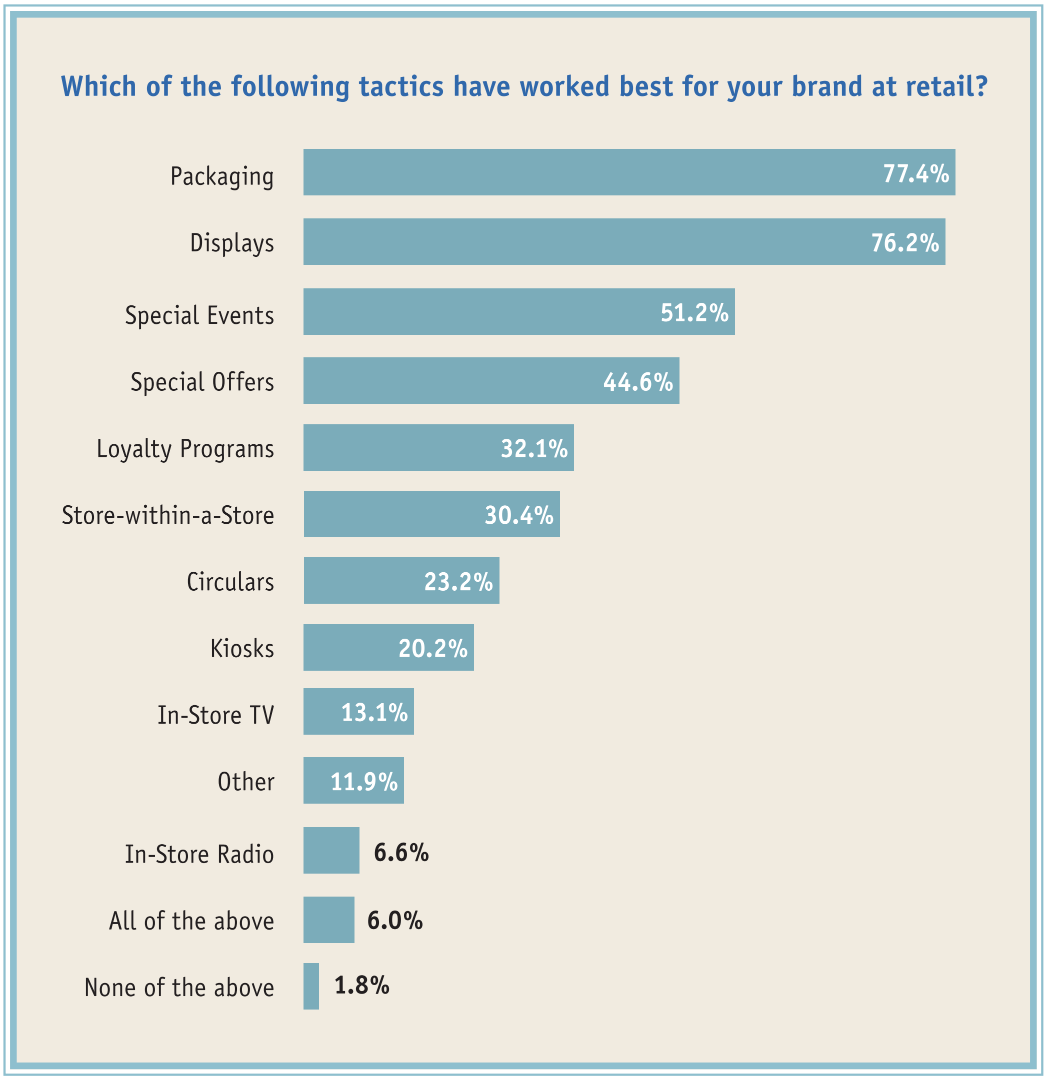
When AeroBed decided to expand into high-end retail outlets, its packaging was a central feature of its strategy to re-position the brand as a premium product. It didn’t matter much what the box looked like when AeroBed was a mail-order product, but now that it was moving into upscale stores, it needed a high-image package to match.

AeroBed’s new package not only conveys the high quality of the product inside, but also reinforced a very simple message — that AeroBed is all about a comfortable night’s sleep. When the boxes are stacked, it creates a billboard effect in the store that clearly conveys the brand’s essence. It looks great, tells a story and is hard to miss.

In some stores, for a brief period of time, the old packaging sat next to the new. One retailer actually



Source: *Reveries.com*



SOURCE: *Reveries.com*

marked down AeroBeds in the old packages by 30 percent—even though the product inside was virtually the same. But despite the higher price point, AeroBeds in the new package sold twice as fast.

The AeroBed lesson applies to almost any kind of product in any kind of store—the simpler and cleaner the packaging the better. Too often, packages are jammed with every conceivable selling point instead of communicating the one thing that's going to make the shopper stop, take notice, and make a decision to buy the brand.

Less is indeed more when it comes to packaging. We also found this to be true when we re-designed packaging for McAfee, a software brand. In McAfee's case, the simple message is that the product inside is for professionals and that it is easy to use. Of course, with any software product there is a lot of information that needs to be conveyed to the shopper. That's why we chose to consolidate and confine the technical specifications to the back of the box and an inside flap, keeping the front of the package clean and uncluttered.

Pantone offers another great example. A recent issue of THE HUB featured a case study about the packaging for *huey*, a new tool for graphic designers from Pantone ("The Color of Ideas," Nov./Dec. '06).

Because *huey* was designed for creative thinkers who tend to use Macintosh products, its packaging was expressly designed to align with the Apple Store retail format. As we all know, the hugely successful Apple Store environment is itself a paragon of clean, uncluttered design.

That's as it should be. After all, as the *Reveries.com* survey respondents noted, "clutter" is a major obstacle to building brand identity at retail. The last thing

SOURCE: *Reveries.com*

we should be doing is adding more clutter with our package designs.

The world would indeed be a happier place if everybody simplified their packages and there were fewer messages being thrown at shoppers at retail.

The problem seems to be that too few marketers truly understand the difference between "shopper" marketing and "consumer" marketing.

The challenge is to design packaging in a shopper's "on-the-go" mindset instead of a consumer's "on-the-sofa" mindset.

The heart of the issue from an organizational standpoint is underscored in a set of questions toward the end of the *Reveries.com* survey.

The first question was: Does your brand have a retail strategy? Seventy-three percent said "yes." The next question was: Is your organization ready to maximize the building of brand identity at retail? Only 44 percent said "yes."

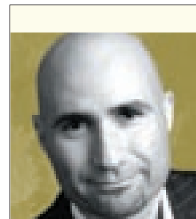
That's a big drop-off. A few survey participants mentioned the classic divide between sales and marketing as a key obstacle. That's certainly a problem at many companies. Several traced the problem to the influence of, as one respondent put it, a "corporate culture of advertising." That's a possibility, too.

Still others noted a disconnect between those who design the packages and those who implement "shopper marketing" at retail. In my experience, that's very true. Depending on the size of the organization, the packaging and the promotion people might not even know each other.

AeroBed, McAfee and Pantone all had the advantage of being relatively smaller organizations where the package-design and retail people worked together closely. At packaged-goods companies, which can be huge, the opportunity for that kind of collaboration can be limited.

At the risk of sounding glib, it's time to tear down those silos and bring the packaging and the "shopper marketing" people together. The opportunity to succeed — and the danger of failure — is too great to risk on anything but a more integrated approach.

Given the rising power of the retail trade, much is as stake. But the opportunities are big as well. As the *Reveries.com* survey suggests, the power of packaging is the greatest tool at your disposal to build your brand's identity — along with its sales — at retail. ■



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Burt's Bees

"Burt's Bees built the business when they had a lot of white space to themselves… And now they are the giant," says Karen Young of The Young Group. That "white" space is more accurately "green" space — and it dates back to 1984.

That's when Roxanne Quimby, a graphic artist, met Burt Shavitz, a "photographer-turned-beekeeper." Roxanne "turned his beeswax into candles, hand salves, stove polish and lip balm, using old recipes gathered from farmers. She illustrated labels for the products using Mr. Shavitz's bearded face as a logo."

The brand promise then, and now, is a simple one. It's that "products virtually free of chemicals are healthier for the skin." Burt's Bees "makes simple products using plain ingredients like milk, honey, beeswax and almond oil, selling them in cheerful, tongue-in-cheek retro packages."

Initially sold through "thousands of independent gift stores and pharmacies," Burt's Bees began selling nationally at CVS and Walgreens" about two years ago, but has not lost its authenticity among its public.

"They seem like an antiquey, farm-style company," says Jessica Wojcicki, adding: "But then you discover they have lip shines for young Gen Xers like me." IRI's Leigh Ann Rowinski notes: "Everyone would like to capture that word-of-mouth viral marketing that spreads like wildfire, attracting a young consumer who appreciates authentic niche brands and stays away from mainstream advertising techniques."

Bottom line is, Burt's Bees is "the best-selling mass-market, natural, personal-care brand…Retail sales increased to $250 million in 2006, up from $60 million in 2001."

(Source: Natasha Singer, *The New York Times*, 5/16/07)

Dunkin's Tribe

Dunkin' Donuts already knew that its fans "had a distinctly unpretentious attitude and disliked more stylized chains like Starbucks." In fact, its customers had made it really clear really quickly that they didn't like Dunkin's newly stylized coffee cups with a sleeker-looking logo.

Nor did they care for earth-toned decor of some of Dunkin's newer stores. Suspicious, they were, of those fancy latte machines, too.

So, Dunkin' fielded some surveys with questions along the lines of "whether the person sometimes had to use his or her looks to get ahead." To its delight, Dunkin' found that about "one-third of the country is made up of people" who don't identify with such behavior.

Even better, a lot of them didn't live anywhere near a Dunkin' Donuts, suggesting plenty of room for growth. And as for those coffee cups, let's just say Dunkin' is back to chunky styrofoam and its endearingly familiar pink-and-orange style.

(Source: Janet Adamy, *The Wall Street Journal*, 5/3/07)

Harley's Nightster

"I wanted people to wonder if it was legal," says Rich Christoph, explaining why he hung the license plate of the new Harley-Davidson Nightster to the left of its rear fender.

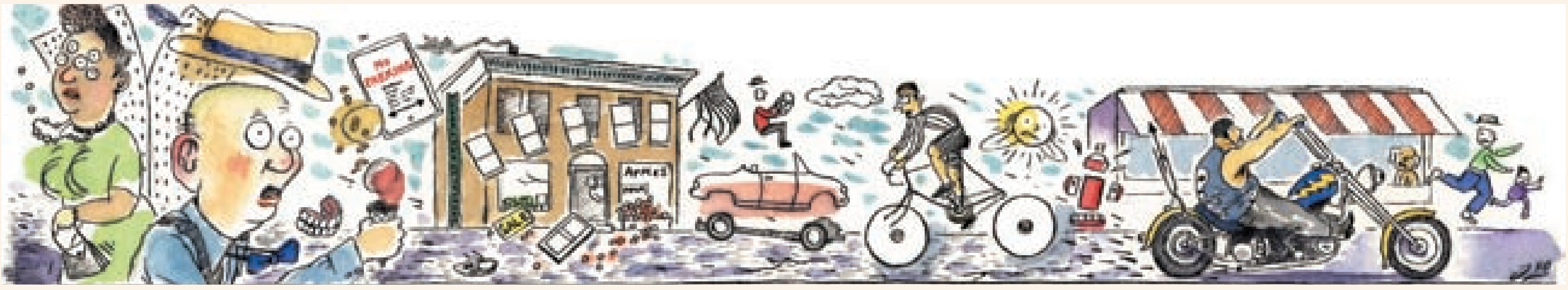
Everybody knows that the license plate is supposed to be at the center — but it turns out it is perfectly legal to set it off-center. It just looks wrong, and Harley hopes it's a look that will help reignite its outlaw image among younger bikers.

That's Harley's challenge — the average age of its customers is now 46. Its solution, hopefully, is the Nightster, a stripped down version of its entry-level Sportster, that Rich designed for people much like himself. In other words, he's 27, not 46.

Harley-Davidson, for the record, is 100, and the Sportster is 50. "I went back to the immediate post-World War II period when G.I.'s came back and rode used Army bikes," says Rich. The color scheme is mostly flat black and medium gray, although there is a fancy orange pinstripe on the gas tank and the exhaust pipes are chrome.

But Rich thinks the real key is that he built the bike "to be highly customized." Harley offers a huge catalog of accessories, which "may be the true masterpiece of Harley design today. The success of Harley has always been in the ability of riders to imprint the bikes with their own personalities."

(Source: Phil Patton, *The New York Times*, 3/18/07)



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A new study of shopper culture examines the role of shopping in everyday life.

Culture of Shopping

By Meg Kinney
The Integer Group

When President Bush tells the nation "I encourage you all to go shopping more" as a suggestion for showing patriotism during a time of war (press conference, December 20, 2006), maybe the nature of shopping has changed.

When human beings trample other human beings the day after Thanksgiving (ironically) just to get a game console, maybe the nature of shopping has changed.

When a grassroots movement meanwhile also promotes the day after Thanksgiving as "Buy Nothing Day," maybe the nature of shopping has changed.

The realization that shopping was getting cast in a specific—yet broader—cultural context made me curious about the role of shopping in modern American life. I began sticking pins in the cultural map wherever the presumably banal act of everyday shopping took on strange significance.

Suddenly, clues were everywhere. Hollywood movies depict the supermarket as a destination for a romantic encounter (there are countless examples). Bar codes in fine art. Weekly, babies ride in carts and toddlers push plastic mini carts. The class implications of high-concept retail expansion occurring alongside low-income retail expansion.

Per capita, Americans have 21.8 square feet of retail space; in China, a country three times our population, there is less than one square foot of retail space per person.

Not to mention that an unprecedented number of advertising messages are suggesting we can save the world and ourselves simply by going shopping—dolphin-safe tuna, free-trade coffee, concentrated laundry detergent, pink-ribbon cure finders, sweat-shop-free T-shirts, greenhouse-gas credits…

The American landscape is replete with literal and figurative messages that urge us to shop—everywhere, every day. *In America, consumerism is culture.*

So much of the last decade in marketing has talked about how much consumers—and their media choices—have changed. However, less of the conversation has centered on how *consumerism* has changed.

After all, according to a recent *POP Times* count, there are more than 700 individual in-store retail-network companies today. That's a lot of new screens, pixels, and printable surfaces at the point-of-purchase.

In a December 2006 HUB article, *Art of Shopping*, I applauded that the industry is doing much to advance the science of shopping (PRISM and the "in-store GRP"), but worried that the "art" part of marketing at retail was not evolving at pace.

As retail environments become media channels, it is imperative that there be thought leadership for creative experimentation with messaging. These are new creative units in store and new media experiences. To simply digitize POS or edit a 30-second spot to a flat-screen in-store seems shortsighted about the in-store opportunity.

Concluding that innovation would best be served by a fresh lens on shopping, the Integer Group invested in a "Shopper Culture Study" to inspire industry dialogue.

The study was a purely qualitative research endeavor. We weren't looking for answers; we were more curious about the questions. What questions do we, as marketers, need to be asking to truly explore the possibilities for connecting with and converting shoppers at retail?

Throughout 2006, we conducted three phases of fieldwork with "highly involved" shoppers in four varied geographies. Our participants completed workbooks, conducted trip audits, welcomed us into their homes, and shopped with and for us. We collected more than 100 hours of video footage.

What follows is a top-line of our conclusions. We pursued three areas of exploration around everyday shopping, which was defined as any product you purchase or replace in one month's time. We focused on food, drug, and mass-retail formats.

The American landscape *is replete with literal and figurative messages that urge us to shop—everywhere, every day.*

What role does shopping play in modern lives? It is a blunt generalization, but most marketers of "everyday" brands tend to frame shopping as a task-based, convenience-driven, functional activity—shopping as drudgery and chore, something to be made logical and practical. Somewhere along the way, we managed to disassociate shopping from the rich texture of life.

This is not to deny that pragmatism is part of purchase decisions, but it is to say that consumers seem to place a larger emotional significance on shopping than marketers do.

We believe shopping is a hybrid activity that we call "productive leisure." Surely it is not all play, but it is not all work, either. We found that shoppers hold out hopes and expectations for emotional reward from everyday shopping.

Pam Danziger, in her recent work, asserts that "the shift toward the retail experience is the greatest shift to occur in retail in the last century." Our study concurs. "Productive leisure" points to a whole set of emotions that surround the act of acquiring as equal to, or in some cases greater than, the products themselves.

This is a shift change in how marketers think of meaning. Typically, we talk about meaning as an outcome of the brand once it is used. We propose that meaning is derived from the experience of shopping, as well.

For years, anthropologists have drawn a link between shopping and personal identity. It is not only a form of self-expression but also a way for consumers to connect to their communities and their relationships with others.

Our learning underscores the point that perhaps we, as marketers, have underestimated the emotional importance of everyday shopping.

What if the psychological rewards of the shopping *experience* were used to connect at retail? What could this mean for a low-involvement or commoditizing category? For the discipline of shopper marketing, this opens up whole new emotional territory for messaging, merchandising, and multi-branded campaigns.

What relationship do Americans have with everyday shopping? Our analysis led to two different ways to characterize how consumers relate to shopping: shopping as a muse and shopping as a master.

• *Shopping as a muse.* In this relationship, shopping is opportunity-oriented. Shopping is about ideas and inspiration. The store environment is highly influential; the trip, very sensorial. For those in a muse relationship, the hallmark of a successful trip is the unplanned purchase. This purchase is guiltless; it delivers a sense of spontaneity and possibility. Shopping matters because it connects you to the world. The store is like a trusted editor.

• *Shopping as a master.* Here, shopping is outcome-oriented. It is single-mindedly about saving money and finding deals. Shopping is about mastery and triumph. These trips are intensely planned; the hallmark of a successful trip is the receipt and the percentage saved. The idea of saving money is highly emotional for these shoppers; it matters because it makes them feel wise in the world. The store is like a worthy challenger.

Interestingly, these relationships delivered their emotional "high points" at different times along the trip. Those in the *muse* relationship are most engaged and receptive during the store experience.

On the other hand, those in the *master* relationship are all about the "before" and the "after." They engage in the pre-game rituals of coupon clipping and circulars; the end of the trip holds tremendous satisfaction when the final savings are determined.

What if we began to approach the in-store media mix differently and used each tactic to cue specific emotions? What if we re-conceptualized FSIs/coupons as pre-game rituals for the deal hunters? What if we re-conceptualized displays as points-of-inspiration for the idea seekers?

Is shopping the new activism? While Americans may not be demonstrating their politics on the steps of City Hall as we once did, the question of shopping as a form of political expression bears asking — especially given the hot topics of sustainability and corporate social responsibility.

Shoppers today are not changing all of their buying behavior simply because it's good for society. However, they are beginning to wonder why profit and purpose cannot go hand-in-hand.

There is clearly a "tipping point" when pragmatism trumps cause. But once all things are relatively equal in our expectations of a product or place to shop, shoppers will — and do — make social responsibility part of the consideration set.

As marketers, we must acknowledge several realities. Social responsibility is a mainstream conversation, and shoppers are increasingly aware of manufacturing and supply-chain practices.

Exploring the emotions of shopping ***can positively impact retail experiences and brand sales.***

Equally, 21st century shoppers understand the concept of buying power; they believe that small purchase decisions are capable of change-making in the world. Shoppers are feeling guilt and seeking redemptive options. Most important, shoppers are looking to brands and retailers to make everyday shopping a responsible activity.

Consumerism is culture. In-store marketing as a discipline and retail media as a strategic part of the marketing mix are rapidly evolving.

Not only are we getting more sophisticated about measurement, but digital in-store technology is also opening up a whole new creative frontier.

Everyday shopping is an intrinsic part of who we are and how we connect as a society.

Exploring the emotions of shopping can positively impact retail experiences *and* brand sales. If we are to capture the opportunity fully, we must look at the role of shopping in culture with a much wider lens. ■

MEG KINNEY is executive vice president of strategic planning at **The Integer Group.** If you are interested in the full presentation of "Shopping Culture Study: An Exploration of America's Relationship to Shopping," please go to www.mentalchewinggum.typepad.com.

Ten Years After

By Dori Molitor

WomanWise

Gap, the apparel retailer, definitely recognizes the huge number of boomer women and their buying power. Through research, they clearly have done their best to understand what this shopper wants.

Gap obviously knows that boomer women like to shop in stores with a lot of variety, and that they are less interested in fads than they are in clothes that will last more than one season. They also understand the changes in women's bodies as they age, and have designed clothes accordingly.

Building on that kind of knowledge, Gap last year launched a chain of stores, called Forth & Towne, designed specifically for boomer women.

But after an 18-month pilot run, it was all over for Gap and Forth & Towne.

For all its well-intentioned research, Gap missed the mark. Their attempt to tap into a very lucrative market failed because they didn't understand one of the most important things about boomer women.

What Gap didn't understand is that a boomer woman perceives herself as being about 17 years younger than she actually is. No way is a woman who sees herself as being in her thirties going to shop at a store for old ladies.

American Airlines encountered similar problems but for different reasons. When American decided it was going to try to appeal to women travelers, the first thing they did was create a snappy new tagline—"We Know Why You Fly." As part of this new initiative, they also launched a fancy, lavender-hued website, www.aa.com/women.

Unfortunately, just about everything American Airlines put on the website contradicted its clever tagline. For example, they offered travel tips—including one where a flight attendant offered advice on how to dress and pack—as if women didn't already know how to travel.

The message seemed to be that American Airlines actually had no idea why women fly—and the result was not a happy one. They were pelted with outrage from women who found the website condescending and rife with stereotypes.

The prevailing complaint was that women simply wanted the same thing men wanted—clean airplanes, courteous service and comfortable seats. In other words, the primary reasons women fly really are not gender-based, and in any case, American wasn't even in the game.

American Airlines made the fundamental mistake of failing to understand that what women really want is a better airline travel experience, and not a better advertising slogan.

Then there's the tale of Camel No. 9—a cigarette brand launched by Philip Morris. Personally, I don't think we should be marketing cigarettes at all. But setting that aside for the moment, the story here is that Philip Morris wanted to come out with a cigarette with specific appeal to women.

So, Philip Morris launched Camel No. 9 in a shiny black package that's bordered in fuchsia and

It's been ten years since Tom Peters declared women's economic clout, but most marketers are still in the dark.

teal. They chose the name presumably because it sounds trendy and fashionable, perhaps recalling Chanel No. 19 (as if there's any logical link between cigarette smoke and fine perfume). Their advertising slogan—"Light and Luscious"—was equally mindless.

Camel No. 9 just launched in February, but my bet is that it won't be successful.

As I sit and think about this attempt at marketing to women, it feels like we've gone backwards. I'm thinking back to the Virginia Slims, "You've Come a Long Way, Baby!" campaign in 1968. Those ads carried so much more power, relevance and connection to women who were just coming into their own at the time. They had so much more meaning than this "luscious" cigarette.

None of these marketers—Gap, American Airlines or Camel—has managed to rise above the level of superficiality and clichés about women. It's not as though they haven't had plenty of time to sort it out, either.

Of Peters & Popcorn

It's been nearly ten years since Tom Peters declared women to be the "most powerful economic force on the planet" and Faith Popcorn's *EVEolution* defined the marketing-to-women movement as an all-out business revolution.

This was good news for brands and corporate marketers who had their backs to the wall a decade ago—facing plummeting brand loyalty because of increasingly undifferentiated brands and product parity. The opportunity to serve the women's market was there for the taking.

But the reality is that 85 percent of women today claim brands still don't understand them; most are actually *annoyed* by brand messages. Think about it: $1.6 trillion in women's spending is up for grabs annually.

Today, store brands account for one of five items sold in supermarkets, drug chains and mass merchandisers. That totals $65 billion of current business at retail this year! Yet, corporations continue to expect cost-cutting and traditional marketing practices to drive sustainable corporate profits.

What is the clinical term for those who repeat the same behavior and expect a different result? Whatever it is—they're crazy. Sustainable growth and profits are impossible without brands creating a more intense, personal relationship with women—beyond product, price, packaging and promotions.

Were Tom Peters and Faith Popcorn wrong? Or did marketers fail to take the kind of bold actions needed to realize the full potential of women's economic clout?

The answers are obvious. Most marketers have not found the courage to take the radical actions required in revolutionary times. Very little has evolved in the past decade compared to the economic opportunity the women's market offers corporations.

The fact is, marketing to women is a *business* opportunity, not just an *ad-hoc* initiative. It's not about marketing to women; *it's about serving the women's market.*

Marketing to women is a business opportunity, not an ad-hoc initiative.

It's easy to come up with a clever theme, ad campaign or website that seems like something women will like. But because it's trite and phony, that kind of approach won't get to the core of the market opportunity. Not even close.

At the Core

The good news is, a handful of brands—including Kimpton Hotels, Eileen Fischer and Wachovia Bank—are leading the way by putting women's interests first.

Kimpton Hotels. From the very first moment of the first time I walked into a Kimpton Hotel, it just felt different. There's a certain warmth and friendliness that's hard to put into words, but that makes all the difference. It's all very nuanced, but adds up to a very different kind of hotel stay.

For example, like many other hotels, Kimpton gives its guests a certificate for a free drink. But at the Kimpton, it's written in such a warm, invitational way that you actually feel compelled to take them up on their offer.

During my most recent stay, I checked in at around six or seven, and there were all of these women in the lounge who looked like they were having a great time together. I assumed they had arrived as a group and all knew each other. I was exhausted, but I went up, changed, and came back down to see what was going on.

As it turned out, none of the women had ever met before, but they seemed like a bunch of long-time girlfriends, just sitting around talking. To my surprise, the hotel's manager was part of the group — visiting, talking and having a good time. The feeling was very different than the usual "come and get a free drink" at our bar.

When I returned to my room, I found a handwritten welcoming note, and someone had taken the time to dim the lights so that the room had a warm feel to it. Even the bathrobes were special, with an unusual, leopard-patterned fabric. And there was this beautiful basket of bath salts — almost like what you would find at a spa.

Of course there *was* a cost associated with the bath salts but the presentation was so subtle that it seemed more about making my stay as relaxing, pleasant and comfortable as possible than it was about trying to sell me something. The overall sensibility was more like that of a retreat than the usual hotel stay.

All of these touches clearly were put in place for women, but plenty of men stay at the hotel as well. Women do tend to have higher expectations than men and are more aware of little details. But the point is, if you can make women happy, you are likely to exceed the expectations of most men.

It's worth noting, by the way, that Kimpton's CEO is a man, as is the majority of its management team. Clearly, Kimpton is listening to women and serving the market versus just marketing to it.

Eileen Fisher. Many women see Eileen Fisher, the fashion designer, as someone who isn't selling apparel so much as she's selling a lifestyle. That's because Eileen Fisher is truly a nurturing, genuine, human being.

She cares about her employees and where her products are made. She visits the factories that manufacture her clothes and gives a $1,000 wellness allowance to every employee each year.

It's not like this is part of a marketing strategy, *per se*, because it all goes right down to the core of who Eileen Fisher is as a person. In fact, she doesn't talk about her employee practices in her marketing. It's just the way she runs her business.

What Eileen Fisher understands is that serving

Nike Does It

Shortly after Don Imus's infamous comments about the Rutger's women's basketball team, Nike ran a simple, text-only ad, which read as follows:

Thank you, ignorance.

Thank you for starting the conversation.

Thank you for making an entire nation listen to the Rutger's team story. And for making us wonder what other great stories we've missed.

Thank you for reminding us to think before we speak.

Thank you for showing us how strong and poised 18 and 20-year-old women can be.

Thank you for reminding us that another basketball tournament goes on in March.

Thank you for showing us that sport includes more than the time spent on the court.

Thank you for unintentionally moving women's sport forward.

And thank you for making all of us realize that we still have a long way to go.

Next season starts 11.16.07.

the women's market is about building trust with her customers and not just about selling clothes. She also realizes that women care about how other women are treated inside the companies they buy from.

Wachovia. Given what I said earlier about advertising taglines, I am a little reluctant to start by citing Wachovia's. But the difference is that Wachovia's tagline—"Shared Success"—actually means something.

It means something because it goes right to the core of Wachovia's promise to its customers—particularly its female customers. Their basic proposition is built upon the idea that if women succeed, Wachovia succeeds.

As a part of its approach to the women's market, Wachovia recently gave away a beautiful journal. Wachovia's logo does not appear anywhere on the journal. Actually, other than a stylish bamboo pattern, the only thing on the journal's cover is the word, "gratitude."

When you open the first page, it says that "gratitude" is about stopping and appreciating the small moments and what you have. Wachovia wants you to use the journal as your day-to-day guide, to stop for a moment and think about the things that really matter in your life.

Every page of the journal features an inspiring quotation. I actually keep one beside my bed, and every time I write in it I know it's a gift from Wachovia.

In fact, I liked my journal so much that I requested one to give to every member of my staff. It's more than just a feel-good. It's a recognition that women are looking for a higher purpose, a higher meaning in life and that brands can help facilitate that.

It's All About Her

It's time we re-think the intensity of the relationship we have with women. It's about a shift from focusing on selling—marketers are too focused on simply getting as much as they can of the women's pocketbook.

We need to shift instead toward building *trust*. It all starts with trust—with making your customers feel valued and listened to, and that the brand truly cares about them. If you do that, the sales will follow.

It's also about recognizing that it's about discovering that single, subconscious *emotional truth* that is relevant to your brand and fits in the context of her world. The more relevant that *emotional truth*, the more intense her response will be.

The insight you need to accomplish that kind of connection requires less reliance on data and more on intuition. Too much of traditional research relies on women to articulate why they do what they do. But we can't expect women to articulate what they're not consciously aware of.

We need to get at the collective impact of gender, cultural, sociological and psychological factors that influence her subconscious motivators, and that requires non-traditional insight approaches.

Winners Rule

The magnitude and urgency of the women's market is staggering. Women's unfulfilled needs are everywhere, but for most brands, differentiation is nowhere.

The velocity of today's consumer loyalty shift—from name brands to store brands—is accelerating. As we all know, when everything else is equal, price wins. But ultimately your brand loses.

Kimpton Hotels, Eileen Fischer and Wachovia understand what it takes. They have developed breakthrough insights into women and stand to dominate their markets. It's inevitable that others will, too.

In today's world, brands are either winning or losing. There is no middle ground.

Others will see the $1.6 trillion opportunity in a new way: As a business opportunity, not an ad-hoc marketing initiative; as serving the women's market, not just marketing to women; and that by putting women's interests first, profits will follow.

When they do, the floodgates will open because they will have changed the rules of the game by competing on a higher-level playing field. They will win with entrepreneurial ideas that spark emotions, elicit involvement and make a woman feel as though she's connected with her brands through a higher purpose—a purpose larger than just another sterile financial transaction.

In today's world, brands are either winning or losing. There is no middle ground. ■

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Brands in the *Balance*

For the last two years, Landor Associates' ImagePower Green Brands Survey has examined changing consumer perceptions of environmentally conscious brands.

The most significant and surprising change is in consumers' definition of themselves as *green*. In 2006, fewer than one-third of consumers considered themselves to be green or expressed interest in green brands. In 2007, every consumer we surveyed self-identified as green to some extent.

In addition, more than one-third of the consumers identified themselves as *active greens,* meaning that they do everything they can to reduce their impact on the environment. For these consumers, green translates into every aspect of their lives.

For consumers, being *green* is not a fad, but a seismic, long-term shift in self-definition and behavior.

Based on these emerging consumer expectations, Landor created a Green Brands Framework to help marketers manage brands in light of this shift in green perceptions. (*see chart*)

Our framework is built on two key questions: 1) Do consumers perceive your category to be green?; and 2) Is there already a green brand leader in your category?

Through this framework, a brand can identify its position and determine the proper response to succeed in the evolving world of green. A closer examination of the characteristics of each of the following four scenarios can provide insight into what to do in the dynamics in your own category.

Seize the Opportunity. The quickest scenario for brands to gain advantage is when the category is considered to be green by consumers, but there is, as yet, no single brand that has captured perceptual ownership of being green.

The categories consumers find to be most green are those in closest proximity to them (*e.g.,* their immediate living space, things they put on or in their bodies, as well as those involving energy consumption). In 2007, the top-three green categories are: 1) grocery stores; 2) appliances; and 3) body care.

The appliances category is a fine example of where it's possible to "seize the opportunity"—every brand in the survey ranked in the low-to-mid 30-percent range. So, although the appliances category is highly relevant to the green consumer, no brand has taken advantage of it yet.

The greatest challenge in this scenario is to ensure that brands launching their green positioning can quickly and confidently back their claims with green actions. It's always important for green brands to support a green positioning with tangible actions, but it is particularly acute in this scenario.

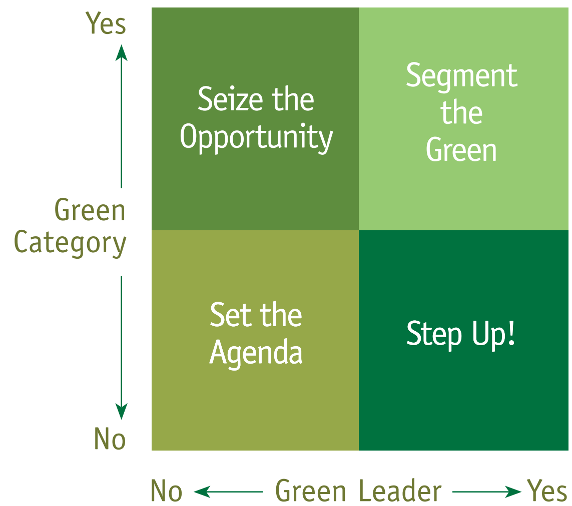
Because the appliances category is important to green consumers, they will have very high expectations of brands making green claims, and will examine them with a keen eye to ensure the brands are being as dutiful regarding green practices as they, themselves, are. The greatest risk here is for a brand to rush to a green positioning and fail because it can't support it with green practices.

Set the Agenda is perhaps the most common category scenario today, as many categories are not considered particularly green by consumers, nor do they have a leading green brand in them. The biggest challenge in this case is justifying the green response, as the payback will not happen immediately.

This scenario requires long-term vision and commitment on the part of the brand to being and communicating green to consumers, even though there may not be any immediate advantage gained from doing so. The brands that are likely to succeed are those that are committed to being green because it's the right thing to do, rather than because of any market opportunity to be gained.

The internet category is a great example of the "set the agenda" scenario. The category is not seen as particularly green by consumers, nor is there a

Landor's Green Brands Framework



leading green brand in it. Brands in this category have an opportunity to define the green agenda and possibly gain a brand advantage.

Recently, Google has been making inroads into the green space, launching the world's largest solar array in California, subsidizing energy efficient cars for employees, and looking into how to become carbon neutral.

However, little of this seems to have helped raise consumers' perceptions of the green-ness of Google, according to our study. Perhaps that's because "setting the agenda" requires not only doing the right things from a green perspective, but also finding a way of linking that through communication to consumers' core meaning of the brand.

Step Up! When a brand does manage to gain perceptual leadership in a category that hasn't traditionally been perceived as green, they are likely to change both the brand and the category dynamics when it comes to green. We call this scenario "step up!".

Brands that have managed to become green leaders in a non-green category often find they have the upper hand from a brand-perception standpoint. Two examples of this scenario are BP in petroleum and Toyota in the automotive category.

Neither category is perceived as particularly green. However, each brand, in its respective category, leads in perceptions of green. And each has changed the category dynamics from a perception and a behavior standpoint.

Toyota's success with the Prius hybrid car has transformed its brand perceptions into the greenest of the automakers. Although it has sold a little over one-million Priuses since launch (compared to annual sales in 2006 of over two-million vehicles), the perceptions of the brand are enormous and have caused other vehicle manufacturers to create and market their own hybrid vehicles to try to catch-up to Toyota.

In 1999, BP created a similar effect in the petroleum category by transforming its brand positioning to "Beyond Petroleum." Since then, each of the petroleum super-majors has worked to communicate what they are doing in the areas of alternative energies and energy conservation, like BP.

Segment the Green is where a green category is dominated by at least one green brand. In this scenario, marketers need to segment the green market, find a customer segment with differing needs, and then position their brand's "flavor" of green to that customer segment.

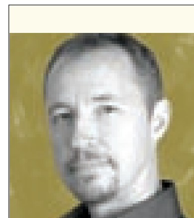
The number-one green category in the study both in 2006 and 2007 is grocery. The overall brand leader both in 2006 and in 2007 in the grocery category is Whole Foods. As a well-known organic grocery that also "walks the talk" in a variety of ways, little brand advantage would be found by trying to out-green the green leader. Brands trying to find a green positioning in the food category have had to take a different green tack.

Trader Joe's emerged in our study as the number-two green brand in the grocery category overall, and the number-one green food brand among the *bright* green customer segment. Although perhaps not as well known for organics as Whole Foods, Trader Joe's seems to have connected with *bright* green consumers through its folksy packaging and advertising, its down-to-earth, Hawaiian-shirt-wearing crew, its handcrafted signs and foods from around the globe.

All of these impressions add up in the minds of *bright* green consumers into Trader Joe's as the green brand for them, above Whole Foods.

Consumer perceptions regarding green brands are changing rapidly. Categories are in different stages of development, with differing competitors who may or may not be perceived as green leaders.

By quickly assessing their category against two simple dimensions, marketers can understand the actions to take in order to capture a brand advantage through being, and being perceived as, green. ■



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For **Ann Hand** of **BP,** brand identity means making the retail experience "a little better."

When Ann Hand graduated from college, she was offered a job as a marketing rep, which she thought was going to put her in advertising. So, Ann got in her car and drove from Indiana to Fairfax, Virginia, where her new employer pointed at a gas station out front and told her she was going to work there for the next few months — and that if she was lucky she'd get a handful of them to run.

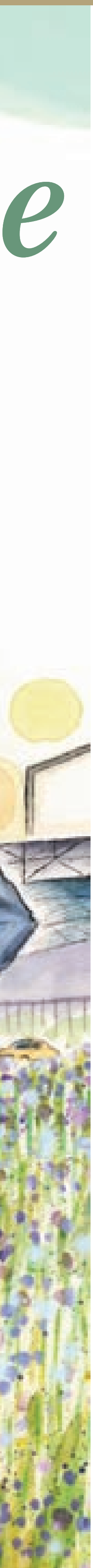
After Ann picked herself up off the ground, she got into it and loved it. Why? "Because everything happens at a gas station," says Ann. "There's just something about the people that hooked me."

Before long, Ann was running eight gas stations in inner-city Philadelphia — an experience that has remained near-and-dear to her heart, even as she took on other roles that sometimes took her away from her retail roots.

Today, Ann is one of the highest-ranking female executives at BP. Her title is senior vice-president of global brand-marketing and innovation — a title and job description that she, herself, created.

Ann is, in effect, BP's chief marketing officer, but she rejected that particular trapping because, she says, she wanted to make sure that marketing got "the strongest seat at the table" and wanted to "avoid taking a title that could get in the way."

Most important, Ann recently launched a two-part plan, named after the company's logo — *the Helios* — to change the way people think about gas stations. One part is *Helios Power* — an advertising campaign. The other part is *Helios House* — the world's first sustainable gas station.



e Green Team

What is the thinking behind BP's new marketing campaign?

It starts with the highest idea, which is that we have 25,000 retail stations around the world, which have 13 million customers a day. We're on the heels of McDonald's, in terms of site count. The number of customers we serve per day is within range of some of the biggest retailers in the world.

And yet, when we thought about how to make the most powerful impression on our customers, our retail stations and the people who run them just felt like a very untapped set of resources.

How did that inform your current strategy?

I am determined to try to crack the code on gas stations because getting gas has turned into a dreaded experience. People go to gas stations out of necessity and they're locked there for three minutes, quite unhappily. They usually aren't thrilled about the price of the gas, they aren't expecting the friendliest of service, or the highest quality of food.

It just felt like it was a worthy cause to try to get after the guest experience at these sites and to do something with them—rather than just accepting it and the self-fulfilling prophecy that buying gas is a bad customer experience. So, we are trying to take a couple of bold steps to change perceptions.

How does your ad campaign accomplish that?

It captures the spirit of BP. Competitive advertising tends to either be about the macho-aggressive performance of the fuel, or it will tend to show a really beautiful gas station with flowers and an artificial experience.

But that's not real life because these 25,000 sites we have around the world—some are old, some are new, some are large and have all these extra services, while some just offer fuel. So, we went after the things that could be true about all of our sites—that they could give friendly service and be clean and that they could celebrate all of that under the banner of the BP logo, the *Helios,* which separates us from the rest.

The campaign features bold colors, animation and tries to get people to choose "the green team," on an emotional basis. Our hope is that people will be willing to drive an extra block or cut across a little bit of extra traffic to choose BP stations because they like what we stand for.

Why did you choose "a little better" as your tag line?

It happened to be our internal brand essence. It was a lucky moment. We couldn't have designed it to happen—to come up with an equivalent of Nike's "Just Do It," which means something externally to consumers but also means a lot internally, to Nike's employees.

Our equivalent phrase internally is that we can't promise that our gas stations are going to be a lot better, but we do think it's a worthy cause to try to make them a little better. In a category where people expect so little, a little better might just mean a lot.

We gave that to Ogilvy, our ad agency, and it just so happens that the winning idea actually turned it into the external tagline. Which, to us, is wonderful because it really catches on, both internally and externally, with more momentum.

Why did you go with animation in the ads?

It didn't begin with the idea that we wanted animation. The first images that Ogilvy showed us used a strong color palette and really simple images. We were also looking for something that could be global and used very few words, so it could translate easily into different languages.

We had these strong, colorful, simple images, which originally were for a print campaign. When we started to explore how we would bring that to life on TV, it just felt like animation was the obvious way to go. Then we started working with an animation partner who really understood the concept and it started to catch on.

Was part of the plan to appeal to kids?

There was definitely a part of us that was going after a softer, more emotional message, in addition to a functional one. My personal opinion — and I've worked for other oil companies — is that BP is the most artful and purposeful of the major oil brands.

That softer sensibility is something we haven't used enough of in our marketing. Of course, the knock on it is that it's going to appeal more to women, and we knew that. But we weren't trying to exclude anyone. We were trying to find something that might resonate with a wider audience more than the more macho performance-oriented advertising of some of our competitors.

You actually created backstories for the characters in the ads.

Yes. There's Abby Sunshine, who is always spirited and happy. Sal is always thirsty and a little bit laid back. Frankie Clearwater is the intellectual and Michael Stockwell is the driver, who is up for anything.

In other ads, we have Bert, who is our dashing male character. His actual occupation is that he's an actor, so it's a little tongue-in-cheek that he's the actor in our TV commercial.

We have a family in the third spot — the Lighthouse family — who are trying to show what it feels like to try to travel with kids on long road trips. All of the characters can talk about the environment in a way that is engaging, and not at all polarizing.

How important is the advertising to the strategy?

If we're really going to try to change a retail experience, the advertising is critical — most of all to our partners who own 80 percent of the BP sites. We absolutely tested it with consumers to make sure they liked it, as well. But the main customer group, in my mind, is the partners and the staff who run those 25,000 sites.

We were asking the question — would these ads inspire them to want to clean up their sites a little more, or give a little better service? Would it just make them feel proud to operate a BP site and be affiliated with BP?

Of course we had the higher goal of also driving consumer loyalty, but we are really using the

Green Gas

BP HAS TAKEN WHAT USED TO BE "a gritty cut-rate" gas station and turned it into "what it calls a laboratory for environmentally sensitive building technologies." Located in Los Angeles, and bordering on Beverly Hills, the station's "roof is surfaced with 90 solar panels, and a rainwater collection system irrigates the landscaping ..."

"... Built mostly with recycled materials, including bits of glass mixed into the pavement, which sparkle," the station also features "video screens at the pumps" featuring "energy-saving tips."

Such advice, such as reminders of the relationship between tire pressure and fuel economy, are also printed on recycled paper that's "embedded with flower seeds — the idea is that you will plant the paper."

"Everything here is about re-use," says Ann Hand, BP's top marketing executive. The BP station has, in fact, been certified by the U.S. Green Building Council as "green" — making "it the first gas station to receive the designation."

Of course, the building is green but the "unleaded gas it sells is not." Ann Hand hopes that will change, saying that BP "may eventually sell biodiesel and other alternative fuels there."

(SOURCE: Jerry Garrett, *The New York Times*, 3/11/07) advertising to inspire the people who work at our sites to want to give better service.

How do you make good on the promise of the advertising at the pump?

The hardest thing is trying to inspire the staff and our partners and get them on board emotionally. The traditional way is to try to do that is through franchising contracts, legal means and mystery shoppers. You try to use financial incentives to get your thousands of sites and operators around the world to want to scrub their toilets and have their people smile at the counter.

That's such a "stick" approach. We're trying to use a "carrot" with this ad campaign and come at it in a different way. If they don't want to buy in and believe, you can't actually go out with a customer promise knowing that you can't deliver on it. I can't think of any single block that's more important than the people who run those sites. That's what's been so wonderful for us — the partner reaction to this campaign has just been superb.

Why did you create *Helios House?*

We created *Helios House (see sidebar)* because we needed a beacon — again, to really inspire the troops at the 25,000 BP stations around the world. I didn't go out looking for the big, giant beautiful site. I intentionally took a site that was dirty, old and run-down. It was much in need of a little bit of loving care and the idea was to re-wrap it in an eco-friendly way and turn it into a lab.

What I love about *Helios House* is that the easiest thing would have been to have picked a big corner somewhere, knocked off whatever was there, cleared it out, and started from scratch. But we worked within the constraint that it was the ultimate act of sustainability to work with the footprint of the site that was there.

The site's highest point, in addition to being a lab, is to just be a little greener than it was yesterday. The whole idea was that we would help consumers realize that being green doesn't have to be polarizing. It can be fun and it can be self-gratifying to take small steps. Being green doesn't require big lifestyle trade-offs.

What have you learned so far?

For one thing, *Helios House* has blown up a paradigm I had about the recruitment model for retail. We went after recruiting people very differently for *Helios House.* We posted on Craigslist that we were hiring people who are ethically minded and interested in the environment.

We did not say it was a gas station.

We had 268 applicants, called in about 40 for interviews and only two or three left after hearing it was a gas station. The rest stayed and wanted to hear more. We really aren't paying this "green team" that much more than we pay at our other petrol stations.

But they are just so proud to be affiliated with this site that is trying to take steps to stay greener. They love that, in addition to running the register, and having to, yes — clean the bathrooms — they get to talk to consumers about the environment. Not in a preachy way, but actually in a fun way. They try to make those three minutes you're stuck there a little more exciting.

Have you learned anything from consumers because of *Helios House?*

We've blown up the paradigm that no one's ever going to drive two more miles for a gas station. That has really surprised us. *Helios House* is showing us that, in a more brand-conscious world, where we all want the best of everything, that people might actually want a better gas station.

To what extent is *Helios House* a prototype of the BP station of the future?

It's not. If I were trying to design the site of the future, I'm sure it would have turned out looking like a big mushroom! When you try to design the future, you get caught up in red tape and you can't move fast enough. The beauty of *Helios House* is that we just said — look, we're just taking one site, and we're going to try to learn from this one site to try to improve all of these sites.

If it works, why not replicate it?

Because what I want to do is fix the 25,000 stations we have versus building 4,000 new ones. There's no doubt that elements of *Helios House* could be retrofitted onto existing sites. When we are building new sites we'll also try to apply what we've learned from *Helios House*

But I wouldn't want to give the impression that all of a sudden BP sites are all going to have this beautiful, big, stainless steel canopy. It's a bit of a work of art and that would be unrealistic.

Do you think BP will ever be as cool as Apple or Starbucks?

You know, I am just amazed that we have become brand conscious about things I never thought we would be. We care what business hotel we stay at, and what fitness gym we belong to. We care about what PC we use. We often use different PCs for personal use than for professional because it somehow says something about us.

So, yeah, I think it's inevitable that at some point people are going to be aware of the brand choices they make in every category. I wouldn't have taken this job if I didn't think it was worth it to try to make the point that the same thing applies to gas stations.

But a gas station doesn't really lend itself to being a "badge" the way some other brands do.

People might start branding up their cars with our logo. Maybe it's because every time they buy gas at BP they get carbon offsets against their fuel purchases. There are all kinds of ways to create that kind of identification. It's fun — but it's also the hard part of marketing.

In the U.K., we have a great program called "target neutral," where our retail consumers can go online and actually buy carbon offsets for their fuel purchases at BP. Then their offsets are automatically deducted through a loyalty card. So, we do have things like that, which try to make your brand affiliation stick after you've left the station. To do that at scale — that's the challenge.

You also have considerable hostility to overcome.

Well, high gas prices, for certain. And then, yes, there's a bit of the stigma of being an oil company. I've said this publicly many times — this is the last oil company I'll work for because I don't think I could beat the fact that I'm with the one that is quite authentic in terms of our brand values and our position on the environment.

So, for me, as a marketer, that gives me something fantastic to work with. It's something that personally motivates me. If I were trying to project "green," but didn't think it was core to the company and the way we did it, then it wouldn't feel right.

It is hard to be in the category called "oil companies," but it doesn't occur to me that I should therefore not do the right thing. It's just one more obstacle that makes the fight a little more interesting.

How much of a difference do you think you can make?

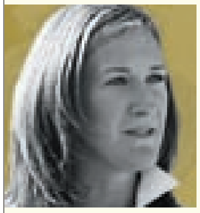
It's hard to think about how to take a low-involvement category and be the group that tries to break out and make it high involvement. That's quite a big hill to climb — maybe an impossible hill to climb. But that's my job.

What also motivates me is — having run sites myself — I believe that our partners deserve it. They play such important roles in their communities. These are business people who give a lot back to their towns. Twenty years ago, their corners were looked at with a lot of positive imagery. These people ran the gas station where they knew your name and it was actually a beacon of service.

I think about that — and maybe I'm a bit too romantic — but gas stations once had a positive image of service. The notion of just accepting that somehow we've just gotten into this place where we're part of an industry that has negative perceptions and that we're just going to sit here and take it — doesn't feel right.

Our business partners are such high quality that if you give them something good enough — like *Helios Power,* the advertising campaign — they'll take it and run with it.

Helios Power has scored the highest execution percentage we've ever had with our partners in any promotion since BP and Amoco came together. That just tells me we are on the right track and moving in the right direction. ■



ANN HAND, as senior vice-president of global brand-marketing and innovation, is the driving force behind re-framing the **BP** consumer brand. Before joining BP, Ann held marketing, finance and operation positions at Mobil Oil and McDonald's Corporation.

The 27-Month Plan

Setting standards is critical to CMO success.

By Charlie Tarzian

CoActive Marketing Group

The reason that the average tenure of chief marketing officers is little more than two years came clear in a recent *Reveries.com* survey.

It's not because they're not great at strategy. Seventy-seven percent of the survey's 306 respondents said they agreed that their marketing organization is "viewed as a key participant in the company's strategic development process."

It's not necessarily because they are lacking the information they need. Sixty-five percent said they were equipped to "leverage market, customer and competitor data through the organization for decision making and planning purposes."

And it's not because they lack the tools to analyze the results of their campaigns. Fifty-seven percent said that they "measure a marketing campaign's impact on lead generation and brand stature."

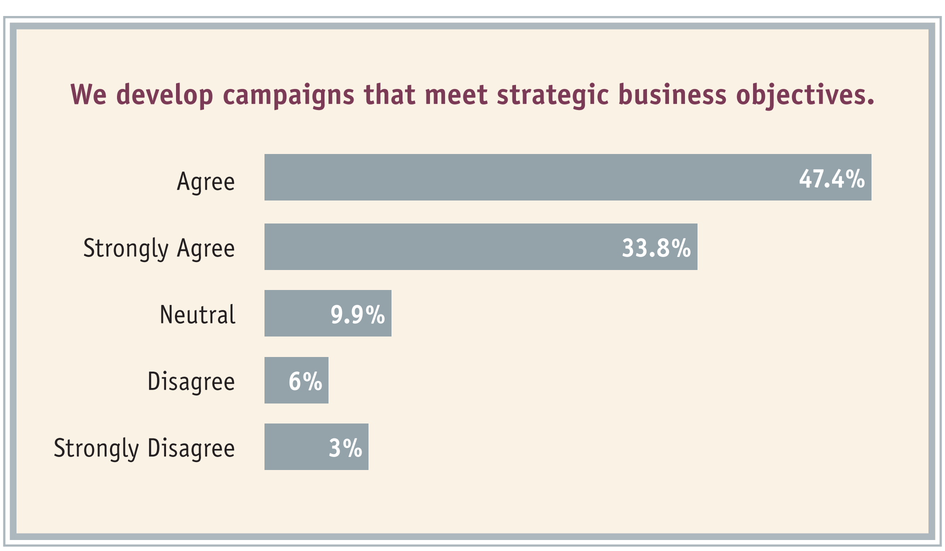
You've no doubt noticed that the percentages decline as the issues turn from broad, strategic matters to the nitty-gritty of actually implementing and analyzing the results of their marketing programs.

The fall-off is even more dramatic when the questions concern marketing operations and the hard work of establishing best practices. When the question was whether resources were allocated across marketing disciplines "based upon a published, well-understood methodology," the percentages went south.

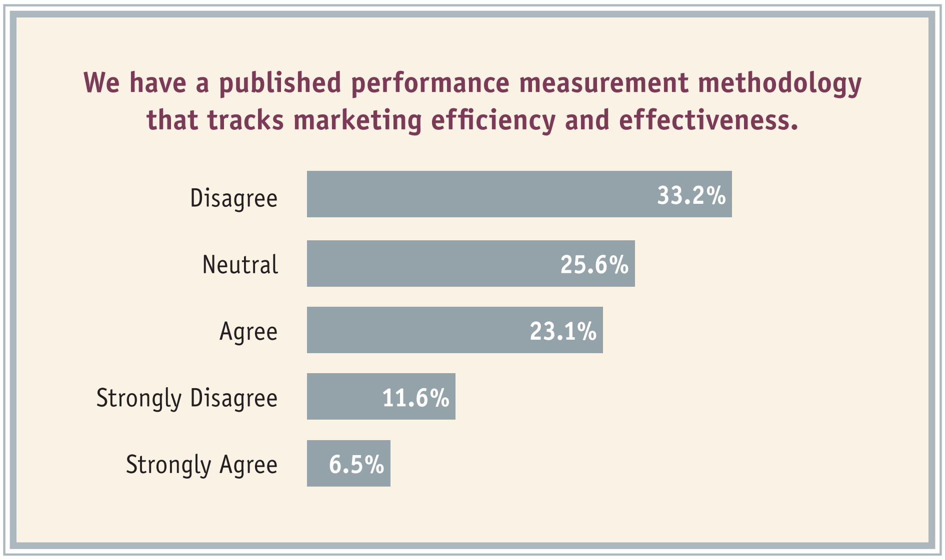
In fact, a plurality of respondents to that question — 43 percent — said that no such published methodology existed within their organizations. When you add in those who were "neutral" on the question, the total jumps to 72 percent.

To the question of whether they had "a published performance measurement methodology that tracks marketing efficiency and effectiveness," once again, those who responded in the negative were in the plurality at 45 percent. With the "neutrals" added, the total was 78 percent.

In a related vein, a plurality of 45 percent said their organizations did not have "clear career tracks and paths for advancement" within their marketing organizations. Another 25 percent said they were "neutral" on the issue.



Source: Reveries.com



Source: Reveries.com

Finally, there's the matter of agency partners. While the results here were not quite as negative, only 43 percent said they "regularly evaluate vendor performance against consistent efficiency and effectiveness measures." Fifty-four percent either said they didn't engage in that type of evaluation or were "neutral" about it.

A few chief marketing officers appear to be responding to these issues simply by changing their job titles to something other than CMO. That's not likely to help.

The pattern is clear: The problem, broadly speaking, is a lack of standards against which to evaluate and improve upon results. The solution is to embrace the principles of Marketing Resource Management (MRM).

MRM has become an unfortunate stepchild in marketing organizations mostly because its banner has been carried by technology and software concerns that see it as an opportunity to create a monolithic architecture much like the infrastructures built for other mission-critical functions.

There is a lot of logic behind this in that the last great bastion that has not been touched by the efficiency revolution is marketing, corporate communications and advertising. So, companies that have had success implementing financial systems, inventory and logistical management, call centers, etc., are lining up to extol the virtues of employing them to extend their track records into marketing.

The problem, of course, is that Six Sigma and zero defects does not apply to something that requires art and science, data and compelling engagement strategies.

Yet, based on the survey's results, a need remains to institutionalize the intent of MRM through the tools and processes that allow for real-time and proactive changes, enhancements and strategic changes while ensuring quality and efficiency.

Five Steps to MRM

Here are five things you can start doing to create an MRM infrastructure and thought process that will work for your company:

1 **Create a marketing COO.** We have to start thinking about the CMO position as the CEO of marketing and communications. The position drives direction, ensures alignment, is the keeper of the vision, and looks to integrate as a key part of the innovation of the company.

The OMO (Office of Marketing Operations, if you will) focuses on the practical, daily needs that affect success across all communications through ensuring tactical marketing architectures that provide the tools and insights to keep score across the many activities that are occurring at once.

I am always amazed at how marketing organizations set goals for their people that are narrowly focused on their brands, their campaigns and their tactics — but without a nod to a portfolio strategy that shares a knowledge base that shows success, learning and best practices.

The OMO need not be overcomplicated. The way to design something that works for your (or your client's) organization is to concentrate on any of the weaker links as revealed in the survey and drive just that one thing as the starting point of what will become a real-time diagnostic system.

2 **Make MRM doable.** MRM is much more about the culture you create than the technology infrastructure you build. The primary task of marketing and communications is to provide the content, insight and activities that will support and drive sales profitably.

That said, the goal is find ways to utilize automation and technology to align all activities under the banner of sales enablement.

We have clear career tracks and paths for advancement in our marketing organizations.

Source: Reveries.com

3 Re-design training & career management. If you are under the age of 30 and interested in marketing communications, you have probably built your own website, mixed your own music and put on your own rave, edited your own movies and music videos, participated in online MMA's (Massively Multiple strategic games), and created a presence on Facebook or MySpace.

And yet you show up for work and are instantly dumbed down. What a de-motivation it is when you find out your boss in her/his mid-forties thinks the BlackBerry is the greatest invention known to humankind and creating neat charts in PowerPoint is their version of solving *Fermat's Theorem.*

Turn the tables on training and career management by learning from and asking more of this next generation of marketing leaders. A client once told me: "The best candidate for any marketing job is a project manager who is also a data analyst."

4 Think like a portfolio manager. As it relates to your marketing partners — the agencies and companies that assist with ideation and tactical delivery — hold them accountable as you would a stock in your portfolio. Create quarterly statements that can accurately depict how they are adding value as part of your sales enablement team. Agencies' use and adoption of key MRM technologies is woeful — and the history of investment in marketing automation and realtime systems — is well documented as something that is optional, not mandatory.

Just as clients have had to force so-called integration among their marketing partners to build media-neutral campaigns, clients will and should force a change as it pertains to being an agency that is savvy and a leader in deploying — or at the very least participating in — MRM-like solutions.

5 Be more than a brand steward. In this age of the "enlightened consumer", your brand is your content and your goal is to help chaperone consumers through a sales funnel that has radically changed with the advent of self-service research and consumer-generated content.

Your brand is now more complicated. The need to pay off what your brand essence is to a sophisticated, "everyone is capable of editing you out," time-starved audience requires that you have your ear to the ground to a much greater extent.

Concepts like content supply-chain, content-consumption segmentation, self-service sales enablement tools, digital-asset management and real-time data dashboards for partner scoring will have as much to do with your success as brand essence and personality, creative reviews and integrated campaigns.

Turning a two-year tenure into a career would benefit not only the CMO, but would also provide the stability that brands need to grow and build equity.

We know we are getting the strategies right — we have great ideas, we always have — and we will continue to be creative. But we must acknowledge how our business is being professionalized in new ways — process, data, discipline and measurement.

These ideas, along with our creative ideas, round out the capabilities needed by CMOs to be successful in our hyper-competitive marketplace. ■

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Path to Purchase

It's astonishing that so much money is spent building brand identities outside the store that are not carried through inside the store. All of that great and wonderful brand-identity advertising is all but forgotten by the time the consumer gets to the store, where the experience too often is neither great nor wonderful.

There could be any number of reasons for this, but a few key issues deserve special attention.

First, we need to stop thinking in terms of brand identity in the traditional sense because when consumers are shopping they are not thinking about brands in the traditional sense anymore.

Forget about brand identity. It's all about the shopper's identity.

Maybe 20 years ago, shoppers might have gone into a store thinking about how Tide made their clothes whiter because that's what they saw in television commercials. But today, as we all know, shoppers aren't watching commercials as much, and consequently, are not thinking as much about brands and their benefits.

To the contrary, they are thinking only about *themselves*—their problems, and how well the shopping experience is addressing their needs. They are driven by the pressures of time, price and lifestyle. And they are motivated by wants and needs that include health/wellness, quality and convenience, for example.

Time pressures, in particular, are driving shoppers to make conscious trade-offs that can be contrary to— or at least independent of— conventional brand loyalties. The whole trend toward prepared foods is a great example of this. Most families certainly would prefer a home-cooked meal, but time pressures make it impossible to make that happen as often as it once did.

Retailers are responding to this dynamic in a big way by offering more in the way of prepared foods and meal solutions. But as I wrote in the March/April issue of THE HUB (*Get Fresh At Retail*), that trend presents new challenges for those in the consumer packaged-goods business.

The question I raised then concerned the relevance of consumer packaged goods companies in supermarkets where the emphasis is increasingly weighted toward "un-packaged" goods.

Part of the answer is that our orientation as marketers needs to shift from *brand* identity to the *shoppers'* identity and what the shopping experience means to them. As marketers, we need to be thinking about how to engage those shoppers and address their needs within the context of the shopping experience.

Experiential Packaging

Granted, it's a little hard to see how brands, whose identities are confined to boxes, cans and bags, can have a meaningful effect on the shopping experience.

Much of the conversation around the shopping experience tends to focus on creating special events, or creating theatrics that can engage and motivate the shopper to purchase. For most brands, that sounds like a tall order. It certainly is a far more complicated process than offering the usual coupons, displays and promotions.

The good news is, shoppers aren't necessarily looking for high drama. More often, they are looking for relevant solutions to their immediate needs.

Those solutions can be a lot simpler than you'd think. It can be as simple as changing a product's formula and packaging. One packaged goods brand in particular—ALL Small & Mighty detergent—is a perfect example of how an innovative approach to product packaging can improve the shopping experience.

If you're not familiar with it, ALL Small & Mighty is a concentrated laundry detergent that comes in a much smaller package than conventional detergents. While visiting supermarkets and talking to shoppers in several supermarkets near my home in suburban Dallas, I was a little surprised by shopper enthusiasm for this product.

That enthusiasm is partly (and simply) because the package is not as heavy as conventional jugs of detergent. It requires less storage, and you don't have to buy it as often. Because you use less and the package is smaller, it is more environmentally friendly, too.

For the aging baby-boomer population, for example, it's a perfect fit. As one boomer shopper told me: "It

Path to Purchase

	Aware →	Attract →	Engage →	Motivate →	Activate
Distance	Out-of-store	Across the store	Near the shelf	At-shelf	In hand, cart, register
Intention	**Introduction** "I want to know more."	**Enticement** "What is that? There it is."	**Involvement** "I want more."	**Commitment** "This is for me."	**Consummation** "I want to buy this."
Scope	Media-specific	Category	Section or consideration set	Product/SKU	Accessory, enactment, payment

Source: Advantage Retail

used to be that when we had a family, bigger was better. Now smaller is better."

But the most important thing about Small & Mighty is that it aligns with the way people shop the store. Twenty years ago, people shopped the aisles first and the perishables on the perimeter of the store last. It's just the opposite today. Now, supermarkets almost force you to shop the outside first, followed by the center of the store.

What this means is, you get to the detergent aisle after you've bought your eggs, your produce and your freshly baked goods. You pick up this big jug of laundry detergent and you have to stop and figure out how to get it into the cart without crushing the bananas and the muffins. That may sound like a small matter, but it's not to anyone who likes their bananas without bruises!

One other point: I asked shoppers how they heard about ALL Small & Mighty and a good number of them said they had heard about it from a friend. Obviously, those friends weren't talking about the brand because of a television commercial; they were talking about the brand because of the shopping experience.

In short, marketers who translate a brand's identity to make it salient to shoppers, to make it satisfy one of their pressures or need states while they're shopping, will have a big advantage over those who do not.

You can't leave this to chance. You've really got to design the experience, in-store.

Engage and Motivate

The key is to develop a clear understanding of how shoppers shop the store. My colleagues at Advantage Retail, John Meyer and Matt Chambers, came up with the idea that the shopping experience is a progression of five steps, which they call "the path to purchase" *(see chart)*.

The five steps are simply to make shoppers aware, and then attract, engage, motivate and activate them to purchase. During the process (from engagement to conversion), shoppers experience a series of decision points that either draw them closer to the point of action or turn them away.

These "forks in the road" are where we, as marketers, have the opportunity to influence changes in behavior. We can do so by a) understanding and anticipating the behaviors; and b) enacting shopper marketing strategies against this knowledge and converting the shopper to purchases.

The best way to understand shoppers at these critical intersections is to conduct in-store research that reveals the shoppers' pressures and need states. There's nothing quite like going into the stores, talking to shoppers and watching what they do.

Most of the focus should be on the "engage" and "motivate" steps, because they really are the catalysts—the two steps that cause everything to happen. Those are the intersections where the magic happens.

To succeed at retail today, a brand's identity must be designed to both engage and motivate the shopper. It's not as much about awareness (that usually happens outside the store) or attraction (that's the job of your in-store media plan).

It's about centering your brand identity on attributes that are aligned with improving the shopping experience. If you do that, then the most important step of all—activation to purchase—will take care of itself.

When that happens, your brand's identity will be positioned exactly where it needs to be—in a shopping bag and on its way home. ■

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Branding *at the* Core

Five steps to unlock your brand's identity and unleash business growth.

Those of us who have been in brand marketing for some time can't help but remember the good old days of building brands. There were fewer brands to choose from, fewer outlets in which to sell those brands and far fewer competitors.

Back then, as marketers of fast-moving consumer goods, we learned the "traditional" classes of trade (food, drug, and mass) and we had brand fact-books that included information about our two or three key competitive brands.

Fast-forward to 2007 and the lines between the traditional channels have blurred. There are now club stores, value stores, convenience stores, specialty stores, and of course, the internet. Depending on the category in which you compete, other category specific outlets also play a role. Gaining a consumer's trust and loyalty has never been more challenging.

Along with the development of new shopping locations has come the advent of a multitude of new niche brands and an innovation cycle that gets shorter by the minute. Without a long-term vision of where you want to take your brand and a strategic plan on how to do it, one can easily get caught in the short-term exercise of simply replicating last year's pipeline.

That's a losing battle all the way around to *competitors* as they out-innovate you, gain consumer loyalty and valuable shelf space; to *consumers*, as what your brand stands for becomes more and more muddled; and to *customers* as your position as a thought-leader diminishes and your shelf space, positioning and merchandising plans fall by the wayside (as leading competitors expand their footprints).

The key to staying away from that vicious "pipeline" cycle is not only understanding, but also sticking to your brand's identity and consistently communicating it in all brand activities and interaction points with your consumers and your shoppers.

That sounds simple, but as you might guess, it is definitely easier said than done. Defining one's brand identity and then communicating it constantly and consistently to your consumers as well as your customers requires a serious commitment. It means sometimes saying "no" to the latest fad in the category because it is inconsistent with what your brand stands for, and allowing another brand in the portfolio to ride that wave.

So, how should we go about defining a brand's identity? Let's lay the foundation by defining the term "brand identity" as the brand's outward expression of what it stands for — its promise to consumers and the benefit it provides to them… *uniquely* from other brands.

Brand identity is *the* critical element to defining and differentiating your brand and to developing a loyal following of brand advocates and, importantly, customer advocates. It is the platform from which to extend your brand footprint both in the short- and the long-term.

The big question is *how* to develop a vision for where you want to take your brand. What is the promise or benefit that your brand provides to consumers? And how best to communicate this message to consumers and customers?

These are not easy questions to answer, and to answer them correctly takes a lot of work. But getting it right is the bridge from managing a struggling business to developing a very valuable asset.

FIGURE 1

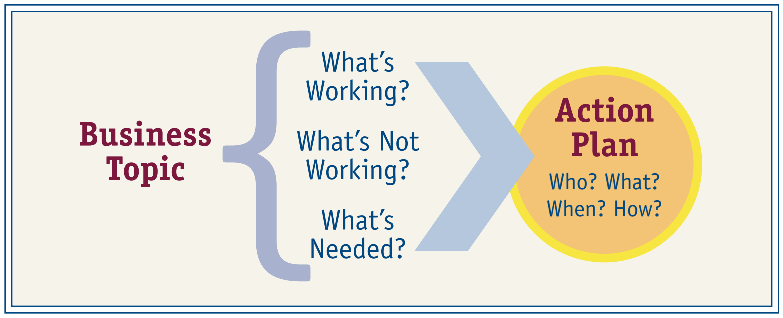

Figure 2

Five Key Areas

There are five key areas of exploration you need to undertake to uncover your brand's identity and unleash it for growth in the marketplace (*see figure 1*).

There are several ways to address each of these five business topics. What we have found to be most effective is a straightforward method of breaking each of these five areas into several distinct buckets: 1) What's working?; 2) What's not working?; and 3) What's needed? (*see figure 2*) From there, it's a matter of designing an action plan around each of these groupings, complete with accountabilities and metrics.

To get started with the brand identity process, the initial question gets at the heart of the matter: "What business am I in?" The answer lies in your brand's history and current activities (future plans for the business may or may not change based on the outcome).

In searching for the answer, it's important to reach out to all of your brand's key constituents—its consumers, its customers, and importantly its competitors—or at least develop a clear definition of who the competitors are and the brand's relative strengths and weaknesses vis-à-vis the competitive set.

For each arena probed, you will need to organize the learnings into what's working, what's not, and what's needed. By keenly understanding the brand promise and benefit to the consumer, as well as the role that it plays for the customer, you'll be able to leverage some natural extensions to the business, both short- and long-term, while concurrently defining your boundaries and limitations, such as where the brand will *not* play.

A similar deep-dive exercise should be conducted to get at a) the way you do business (the brand/company culture); b) how to grow the current portfolio; c) how to approach creating new business platforms that fit to the brand identity; and importantly, d) assessing the organization to ensure that you have the right knowledge, skills, abilities, and behaviors internally to bring the brand identity to life in the marketplace—both for consumers and customers.

Not Just Advertising

Oftentimes the mistake is made in relying on advertising to be the primary—if not the sole—communicator of the brand identity.

How often have we seen a brand with a "premium" communication in its advertising but offered at a deeply discounted price point in store, or shelved or merchandised in a manner that just was not at all consistent with the brand promise? Or a brand that's funky and edgy in its advertising doing the "same old-same old" when it comes to the shopping experience in store?

Concurrent with the development of consumer communications (advertising across all media, promotion, and event/experiential marketing efforts), remember to consider all customer and shopper communications programs.

As you're developing these communication platforms, you need to think about the message and the messenger.

Similar to the way we think of television, magazines, or the web as media (a.k.a. messengers) to deliver the communication to the consumer, we should be thinking of our sales people as messengers who deliver the message to the customer, and our customers as messengers to the shopper.

In short, there is no question as to the value of a strong and differentiated brand identity. It is the key to unlocking a future of loyal customers, loyal consumers and a healthy, growing business.

The secret is to distill the essence of your brands and ensure thorough and consistent communications of its distinct attributes to consumers, customers and the broader marketplace. ■

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Micro-**Communities**

Like so many others each holiday season, my family embarks on an annual pilgrimage to pay homage to our elders in the great Sunshine State. This past Christmas was no exception. My wife and I took our six-year-old twins to see my in-laws in West Palm Beach for a week of fun in the sun and utter dysfunction. This year, however, I decided tradition needed an update — two days in South Beach at the Delano Hotel, sans kids. Don't get me wrong — I love my children — but there comes a time when mom and dad need to be alone.

The Delano, an Ian Schrager hotel and venerable hot spot for more than a decade, with trendy jet-setters this time of year, was exactly what I was seeking — a hip scene in a posh hotel, perfectly situated in the heart of South Beach. In truth, I was there for one reason — the pool.

Gaining access to the Delano's pool during Christmas week is virtually impossible for anyone not staying on the premises.

Security staff, equipped with black earpieces, aviator sunglasses and coveted clipboard guest lists, create an impervious boundary around the complex. Red velvet ropes and a white fence enable you to see what you're missing, while distancing you even further from the experience.

> Social networks should take notes from Ian Schrager and the Delano Hotel.

In these circles, to be granted access is to feel important and to be denied is, well, to feel less-than-adequate. Lounging poolside, I began to wonder how the Delano was able to maintain its popularity within an elite and finicky crowd for more than a decade.

Was it the environment — minimalist, luxe and timeless? Was it the staff's intuitive understanding of the clientele and a unique ability to service their demands? Was it the poolside Bellini service or white cabanas that pepper the perimeter of the water? Was it the aphrodisiac of limited access?

Was it the ability to cavort with others of a similar ilk or pedigree — a carefree networking ecosystem? Or, was the world simply becoming a more vapid place?

As an executive focused on the digital landscape, I turned my attention to business and pondered why more marketers and online social networks were not taking notes from establishments like the Delano.

If the Delano has taught us anything over the last 10 years, it's that *less is more and to maintain exclusivity you must first create demand through desire and intrigue.*

This is not a new concept for many marketers — heck, American Express wrote the book on it with the launch of its Gold, Platinum, and now, its Centurion Black Card. Publishers like NicheMedia (parent of *Hamptons*, *Gotham* and *Aspen* magazines, among others) have taken the model to new heights.

Yet, MySpace, Facebook, LinkedIn, Yahoo Groups, and legions of other "mass" social networks continue to open their doors to millions of netizens when, in fact, they should be considering new ways to close or limit access and create specialized content for "micro-communities."

"Micro-communities" are one of the newest effects of the "long-tail," or the ease with which the public can access highly specific, or niche, content.

Instead of gathering disparate communities under one umbrella and offering a standard set of features and functionality to facilitate interaction, these new communities are promising content, connections, and experiences unique to the micro-community they serve. It is a setting in which we can be different, but not *too* different.

In many ways, this is counter-intuitive to marketers. Scale has always been the Holy Grail online. To achieve scale in your business is to garner higher CPMs (cost per thousands) with advertisers. Scale equals eyeballs online and so the theory goes if you have scale, you have a more widespread and accessible offering among consumers, and advertisers will flock to your site.

This may be appropriate for some marketers online, but I contend that the new model for success is less about scale and more about the power of niche micro-communities and exclusivity.

A recent Nielsen/NetRatings study confirms this point by highlighting that MySpace visitors spent a little more than two hours in a particular month on the site — down 20 minutes from the previous year.

Scion, an automobile with strong brand recognition and preference among young consumers, now eschews advertising on MySpace, saying the site is too *mainstream* for the image they are striving to cultivate.

Where people connect and share collective experiences, there are a multiplicity of new avenues for marketers to cultivate brand awareness and affinity. Some brands, like Carbon — a micro-community dedicated to fellowship among wealthy, young entrepreneurs — provides a ready-made pool of potential consumers and a more targeted point-of-contact than a print media buy.

Luxury marketers, including Land Rover and Valentino, have sponsored events for members of the Carbon community — not because of the scale of its membership base, but rather its profile and influence within larger circles both terrestrial and online.

Other brands are using highly targeted communities to take an online message to a receptive audience, as is the case with Nike's entry into Sneakerplay, a community of athletic-shoe aficionados. Hoping to cultivate a legion of brand advocates, Nike has created a profile and offers downloads and video to Sneakerplay members.

Whether engaging micro-community members online or off, the common denominator for marketers to exploit these platforms successfully is strengthening the connections between individuals who share an interest. Without means of connection, individuals pursue their interests in a vacuum.

The micro-community's value lies in its enabling like-minded individuals to explore and develop their interests in a refined environment. A brand that offers conduits for connectivity becomes a valuable link in this chain, and can leverage this as part of the loyalty-building process.

Such communities offer marketers the ability to drive sales through targeted offers; conduct inexpensive R&D by allowing users access to online prototypes of products, packaging or marketing materials; and provide invaluable information about the nuances of specific audiences and how to communicate with them most effectively. ■

HOW TO
cultivate online micro-communities to create demand and desire

1. Understand your target audience, and more specifically, the nuances that distinguish them from one another. Speak to them as individuals — not a mass community.
2. Drive demand by using your understanding of the target audience to build tools and content that speaks directly to their needs and creates real value within their community — not *en masse*.
3. Develop venues and platforms for sub-groups to form and build trust through authenticity — do not talk "marketer to consumer" in micro-communities.
4. Limit access to specific content, tools and functionality and provide something unique for your loyalists.
5. Always leave consumers longing for more. Remember, what they want they often do not have — and what they have, they often do not want.
6. Make sure coveted features and functionality are truly differentiating.
7. Create viral opportunities for your loyalists to share their special access with other influentials (*e.g.*, think Google and G-mail where each registrant during the Beta phase received 10 G-mail invitations to forward to friends).
8. Deny access as appropriate and create demand. Establish criteria for participation among community groups and ensure that it is adhered to.

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Mega Cultural

The world faces a lot of challenges, and Mega Brands, Inc.—Lego's fiercest competitor—believes that we could well experience the next generation of children living in a world devoid of creativity.

That's why Mega has declared its mission—its *cultural movement*—to be "creativity to the rescue."

The company's flagship product is Mega Bloks, which are plastic, multicolored, building blocks. Mega Bloks are the company's "iMac"—*i.e.,* the volume product which gave life to the idea that Mega can and should champion imagination, free play and creativity.

With its recent acquisition of the Rose Art company brands, Mega also offers other products that feed into this brand idea—puzzles and games, pens and crayons. The power of this extraordinary story comes from the history of the company and the original toys that it made.

When we first started working with them, the company was known simply as Mega Bloks.

Lego's top competitor changes the game with a mom-inspired manifesto of creativity for kids.

Working hand-in-hand with its senior management, we developed a corporate brand strategy that renamed the company Mega Brands, developed a new logo and brand strategy for the umbrella brand, as well as a complex web of different products.

The new umbrella strategy was rooted in Mega's well-known heritage in building blocks and profoundly leveraged it as a cognitive-development product. Our strategy was based on a deep cultural insight from mothers across the United States.

Parents today feel the magical imagination of childhood is under threat. (Just look at the hugely successful movie, *Little Miss Sunshine*). Free playtime is shrinking as children's lives are increasingly overscheduled and over structured.

Since 1980, unstructured children's activities have *declined by 50%*. At the same time, children are filling their remaining free time with hi-tech toys and mind-numbing videogames which parents feel are making their children grow up too fast.

Unstructured free play—the kind of play where children use their own imaginations with toys to play and create, is crucial to building a child's self-expression and creativity. If this decline in free-form playtime continues, we may have to imagine a future generation that is less creative than ever before.

Mega therefore decided to champion the power of creativity in the fight against time-sucking videogames and other non-creative pursuits. Our goal was to create a cultural movement that is bigger than any advertising campaign and that is highly embraced by mothers of young children everywhere.

The idea behind a cultural movement is simple: Understand the prevailing tendencies in society and connect your brand to this culture. It's akin to placing a surfboard on a wave.

Movement

Mega Moms

We began by conducting a social-science study among mothers—"Mega Moms" as we called them. More of a creative research assignment than a traditional run-of-the-mill qualitative focus group, we probed the mothers' sense of control over their families. The actual sessions were overseen by a cultural urbanologist who is directly involved with Montessori Schools.

The sessions were held in informal dinner settings at restaurants where mothers from communities were invited to share family stories, their work lives, the pressures of family and work, and their fears about what gets through the proverbial "gate" into their children's lives.

What we discovered was a prevailing fear of a "lack of control" among the mothers who are the home's guardians. We did not test whether our hypothesis was correct—we simply asked them to help us make it better and more relevant. They helped us pen what later became our cultural movement manifesto.

What we ended up with was something authentic, inspiring and profoundly relevant:

"Once upon a time, there was a creature named Creativity. When Creativity was very young, he was allowed to explore the farthest reaches of his imagination. Nobody told him what noise his train was supposed to make. So he made it sound like a cockatoo. Nobody told him his dragon was scary, so he had his over for pizza. And nobody told him what his tow truck was supposed to tow, so used his to tow the ocean.

"Then one day, when Creativity was all grown up, people throughout the land turned to him for inspiration in good times and bad. Government leaders and scientists depended on Creativity to guide them. Pulitzer Prize winning authors sought out Creativity for inspiration. All the world sought out Creativity to solve its most confounding problems. And that's how Creativity saved the world."

We inserted this manifesto into millions of packages worldwide in many different languages. We also developed an in-store look and feel that brought the entire brand movement to life in Wal-Mart and Toys-r-Us store shelves, integrating our graphics and manifesto into wall shelving. We also developed web content and advertising—both traditional, such as print—as well as innovative web and viral marketing.

Kids Get It

A pre-Christmas campaign featured a website entitled *KidsGetIt.com,* where kids interviewed the world's smartest people at the United Nations building in New York, at Ivy League universities, and also legislators in Washington. Dressed up as ketchup and mustard containers, they asked these leaders questions about how to solve the world's biggest problems.

The kids were met with a combination of complex answers and shoulder shrugs—further establishing the need for creativity in the world. Questions like "How are we going to stop nuclear war?" found no answers among the learned, select few interviewed. The kids, meanwhile, seemed to think that with a little creativity the problem could be solved rather easily.

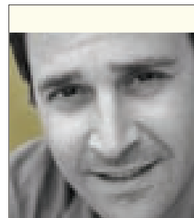
The results of this campaign are not yet in since it is relatively new. However, it's fair to say that the most important results are in—namely that the company staff at a recent internal meeting wholeheartedly rallied behind the new mission for the company.

It has also been embraced to an even greater degree by the very stores that previously were negotiating on a price and product platform. As parents themselves, Mega's retailers felt compelled to join the movement. Because of this, Mega was able to initiate new business discussions with new customers.

Not coincidentally, Mega's chief operating officer was recently selected as the pre-eminent marketer by *Strategy* magazine. That's quite an achievement for a company that used to be thoroughly entrenched as a manufacturer of plastic-molded children's toys.

Mega has used creativity to create a brand movement to generate not simply awareness for Mega the brand, but relevance and a highly emotional connection that is much bigger than the product experience by itself.

Mega's movement for creativity has just begun. ■



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Chain *Reaction*

BY CHRIS HOYT

HOYT & COMPANY

Last month, *The Wall Street Journal* published an article entitled, "Not Copying Wal-Mart Pays Off For Grocers," the theme of which was that U.S. supermarkets have finally turned the corner and figured out effective ways to fend off Wal-Mart and grow their businesses on a non-price basis.

"After years of decline brought on by fighting Wal-Mart Stores, Inc., on price," noted the *Journal*, "the nation's grocery chains are on the mend."

To support its point, the *Journal* cites the fact that sales at supermarkets open at least a year grew four percent between 2005 and 2006—the biggest increase in five years, according to TNS Retail Forward.

Progressive Grocer also lends support to the idea of a supermarket comeback in its *74th Annual Report of the Grocery Industry*, noting that according to its research, total grocery sales were up 4.3 percent in 2006 following a 4.7 percent increase in 2005—obviously significant improvements over the no-growth years of the early 2000s.

How Wal-Mart is changing the supermarket business and why it means more work for *you*.

Sounds good, right? Hmmm…

Before we encourage you to sell all of your Google stock to invest in U.S. supermarkets, we would urge a deeper look. The fact is that underneath these growth figures still lies a nest full of core issues that continue to plague supermarkets in general and do not promise to abate in the near future. Specifically:

- According to the U.S. Department of Commerce and TNS Retail Forward, supermarkets' share of total U.S. food, drug and mass sales has plummeted from 48 percent in 1992 to 28 percent through 2006—and is forecasted by Retail Forward to drop *another* two points to 26 percent by year-end 2011.
- Over the last five years (2001-2006), food-at-home spending increased 5.9 percent, but supermarket industry sales increased only 2.9 percent—indicating that someone else is consistently stealing its chickens.
- During this same period, supercenters grew at an average annual rate of 15.7 percent—most coming from Wal-Mart, which along with SAM's and Neighborhood Markets, now does approximately $134B of total U.S. food sales, according to Retail Forward. To put a dimension on this, $134B is twice the size of Kroger ($66B) at the end of 2006 and approximately 27 percent of total 2006 U.S. Retail Food sales ($499B).
- Meanwhile, consumers continue to leave the supermarket channel in droves. Nielsen reports that between 2001 and 2006, annual trip frequencies per household to U.S. supermarkets declined from 72 to 62, which—when multiplied by 115MM households—mean a loss of approximately 1.15 billion total trips.

In addition, this migration appears to be actually accelerating. According to Retail Forward, between 2005 and 2006, the number of shoppers making a monthly trip to conventional supermarkets dropped from 60 percent to 52 percent while weekly shoppers dropped from 37 percent to 31 percent.

- To top this off, the future doesn't appear to look much brighter.

Versus a compound annual growth rate of 2.9 percent between 2001 and 2006, Retail Forward forecasts supermarket-industry sales growth at only 2.7 percent between 2006 and 2011—equivalent to an anemic 0.6 percent annual growth rate in 2000 real dollars.

The issue for most (not all!) supermarkets is that despite years of experiencing great pain (26 filed for bankruptcy over the last decade), most persist in doing the same things that got them into trouble in the first place.

FILLING THE PRICE GAP

Based on a 2007 survey of 302 executives representing the nation's top supermarket chains on the subject of "Most Effective Solutions for Dealing with Competitors," *Progressive Grocer* reports that more than 31 percent still think that "pricing and promotion" is the answer, while only 21 percent think that differentiation is the answer.

These results indicate how hard it is in this industry to change behavior. It is *precisely* because of years and years of attempting to compete on price with Wal-Mart and the other value discounters that supermarkets have allowed themselves to become so eviscerated.

Simple mathematics — a five-minute exercise — would tell any of these folks that one cannot compete on price when one's operating expenses are higher than the gross margins of one's leading competitors.

The challenge in this situation is not to drive oneself into bankruptcy by continuing to compete on price, but to find ways to make the shopping experience sufficiently rich and exciting that one's customers conclude that the difference is worth it.

There is recent, ample, highly visible evidence of what true differentiation can do to fill the Wal-Mart/value discounter versus supermarkets "price gap." As anyone following this industry already knows, two public supermarkets that have broken out of the pack are Kroger and Safeway — the latter still somewhat unproven because of the lack of Wal-Mart competition in California.

Nevertheless, these folks have led the way by focusing on becoming relevant to their specific shoppers — Kroger, through Dunnhumby, and Safeway via its Lifestyle Store conversions and focus on health-and-wellness. Rather than offer cookie-cutter solutions wherein everything is the same in every store, both Kroger and Safeway have done the research and taken the time to segment and configure their stores based on *local* shopping behavior and proclivities. The results for both have consistently exceeded industry same store sales increases *every quarter* since Q1, 2005, while simultaneously increasing profits steadily.

Relevance Rocks

The key to these successes has been relevancy. By working with leading suppliers — and by actually investing their own "shekels" in research that enables them to establish a dialogue with their respective shoppers — both Kroger and Safeway have apparently managed to find ways to differentiate effectively on a non-price basis, *while simultaneously lowering costs*!

One of the results of this strategy is that — not surprisingly — a whole raft of supermarkets has recently followed suit and developed their own versions of shopper segmentation protocols, each of which attempts to define and clarify shoppers into different "pods," each based on what these retailers have found out to be their customer's primary shopping motivations or need states.

Ahold, for example, now divides its shoppers into six different classifications — *urban seekers*, *traditionalists*, *quick fixers*, *good lifers*, *deserving diners* and *budgeters* — while Food Lion has divided its shoppers into eight classifications — *golden years*, *dinks*, *getting by*, *comfortably carpooling*, *babies and bills*, *wealthy elite*, *savvy singles* and *country living*.

Whether these retailers actually utilize these segmentations to reconfigure their stores and/or merchandising practices remains to be seen (some cannot even effectively get a display up on time).

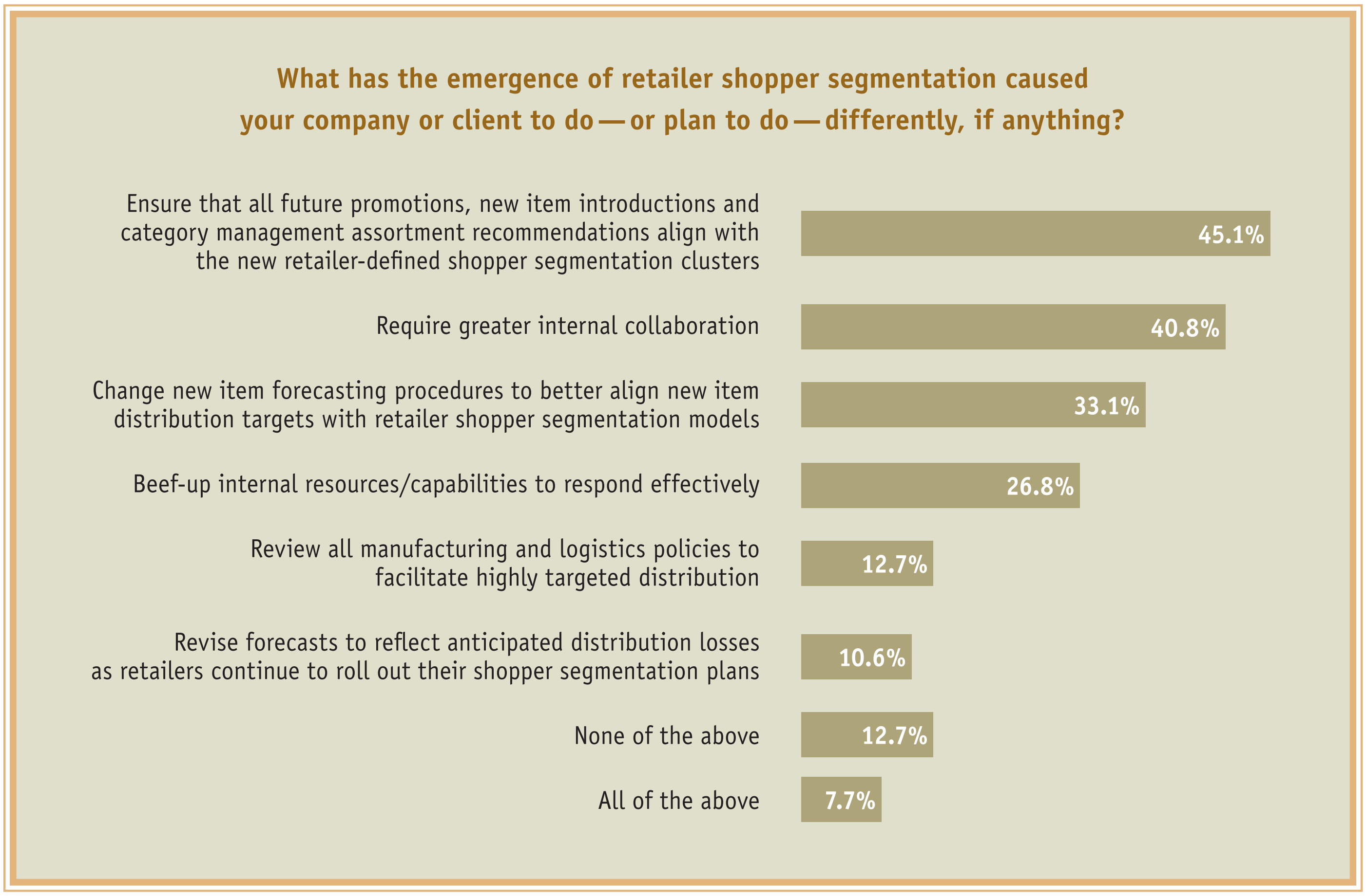
However, the message to suppliers is that most will expect suppliers to align their distribution, assortments, new item introductions and program recommendations with each of these retailers' newly-defined shopper segmentation protocols.

In practice, this means that one could be asked to assort and promote differently in two different stores owned by the same supermarket only six miles apart. To assess the marketing community's reaction to this prospect, *Reveries.com* surveyed the subject in April.

Results from 143 respondents representing 135 companies were surprisingly positive, indicating that most *welcome* the prospect of retailer guidance on what will and will not work best for their brands in specific stores, even at the risk of increased complexity.

- Forty-nine percent — about half — believe that the emergence of retailer segmentation policies will have a "significant" or "major" impact on the way they do business at present.
- When asked to list what retailer shopper segmentation protocols will cause them to do differently, the number-one ranked response (45 percent) was "ensure that all future promotions, new item introductions and category management assortment recommendations align with the new retailer-defined shopper segmentation cluster."

  Another 41 percent said, "require greater internal collaboration" while — importantly — 33 percent said, "Change new item forecasting procedures to better align new item distribution targets with retailer shopper segmentation models." (*see table*).
- Cited by 65 percent as the most beneficial effect of retail segmentation protocols is "better targeting of products and promotions," while another 45 percent look forward to "improved collaboration with key retailers."



SOURCE: *Reveries.com*

- As far as downsides are concerned, 69 percent feared "increased complexity of logistics and execution" — but based on the accompanying verbatim comments, none views this as a hard stop.
- The department expected to be most impacted by the emergence of retailer segmentation protocols is customer marketing/shopper marketing (46 percent), followed by brand marketing (19 percent) — the latter in recognition of the fact that it will no longer be possible for marketers to use a broad brush when forecasting, planning new item introductions or promotion programs.

On an open-ended basis, the survey also asked: "What else do you anticipate will be the impact of retail segmentation requirements on your company, client or business?" Following is a representative sample of the verbatim responses:

"Adapt or face extinction."

"Retailer-specific shopper insights versus brand-specific shopper insights."

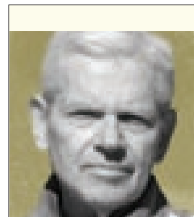
"Our research on retailers will need to reflect the way they view their consumers."

"Building new capabilities in knowledge and insights to work with key customers to truly understand their segmentation strategies."

"The need for marketing organizations and their partners to become more involved with data and targeting — something that has not been the key driver for retail promotions."

"Fewer Saturdays with my kids."

Moral of story: It looks like suppliers may finally have a basis for true partnering with supermarkets — defined as working together to *market* to the mutual shopper at a time when *both* are focused on the same objective (*i.e.*, "relevancy") — something for which we can all be grateful to Wal-Mart. ■



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What Really Matters

"Grease" was the word when Procter & Gamble first introduced Dawn dishwashing liquid in 1972, and it remained so for nearly 30 years, as noted by Ellen Byron in a *Wall Street Journal* review of *What Really Matters*, by John Pepper, the former P&G chief.

That singular focus on one idea — even one word — seemed pretty risky at the time. Conventional wisdom was that so much emphasis on just one brand benefit could be limiting.

Well, it wasn't — at least until Colgate-Palmolive came along with "new fragrances and packaging." As Mr. Pepper recalls, Dawn's singular focus "on the benefit of superior grease removal" then became a liability.

"We had committed the cardinal sin of giving consumers a reason to switch from Dawn." Of course the company "fought back with new Dawn fragrances, spruced up bottles and even an improved grease-fighting formula."

In addition to "suspenseful and substantial" case studies, "Pepper extols the virtues of P&G's "promote-from-within" culture, saying he can't "imagine P&G being able to navigate so well … if it hadn't developed a community of colleagues who had grown up together in pursuit of common goals."

What Really Matters provides "a rare glimpse into a notoriously insular corporate culture … a well-rounded portrait of the challenges of managing mega-brands for a consumer-products titan and one of the world's biggest advertisers."

A Culture of Improvement

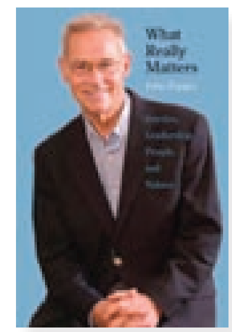
Contrary to popular belief, James Watt did not invent the steam engine, Eli Whitney didn't invent the cotton gin and Robert Fulton did not invent the steamboat, writes Adam Keiper in *a Wall Street Journal* review of *A Culture of Improvement* by Robert Friedel.

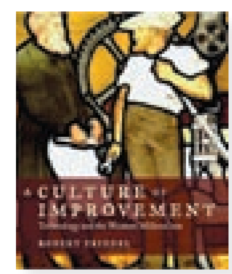
All three of those inventions actually were "incremental and derivative" improvements on existing or extant technologies. As Robert notes, these and other key inventions typically were "preceded by similar machines that incorporated most, if not all, of the principles of the famous devices."

His main point is this: "Too often the existence of a key patent or the success of a manufacturing enterprise has diverted attention from the long and gradual history of creativity." That history, he argues, is not about "advancing human reason or a great, impersonal force directing the course of history."

"Rather, it proceeds by fits and starts — held back, pushed forward or diverted by social and biographical contingencies." For example, Robert Fulton's name is forever associated with the steamboat not because he "invented" it but because he had the "capitalist vision and fortitude" to figure out how to make money from it.

The reason Robert Friedel's book is worth reading, says Adam Keiper, is that he's not a *futurist* who tries to predict where technologies might lead us, but rather a *historian* who understands that "everyday technologies were born of creative genius, hopeful investment, clever marketing, shifting social arrangements and, often enough, sheer serendipity."





The Cigarette Century

"It seems striking that a product of such little utility, ephemeral in its very nature, could be such an encompassing vehicle for understanding the past," writes Allan M. Brandt in his new book, *The Cigarette Century*, reviewed by Jonathan Miles in *The New York Times*.

"But the cigarette," he continues, "permeates 20th century America as smoke fills an enclosed room." Indeed, cigarettes claimed "only five percent of the domestic tobacco market" in 1904. But by the 1950s, "nearly half of all adults smoked. Cigarettes were ubiquitous, with ashtrays freckling every room: nurseries, doctor's offices, TV news studios."

When "the causal relationship between smoking and lung cancer was finally 'proven' in scientific terms … the industry devised a cagey defense; rather than denying the harms of smoking, it insisted there were 'two sides to the story,'" and framed "consensus as controversy."

However, Jonathan Miles thinks that Allen Brandt failed "to examine the central, vexing paradox of smoking: that in return for death, cigarettes give pleasure."

Or, as Jean Cocteau once wrote: "One must not forget that the pack of cigarettes, the ceremony that extracts them, lights the lighter, and that strange cloud which penetrates us and which our nostrils puff, have with powerful charms seduced and conquered the world."

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CASE STUDY 1.9

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CLIENT | Manpower Inc.

The Challenge

Manpower Inc. (NYSE: MAN), a world leader in the employment services industry, recently undertook the company's first global rebrand in its 58-year history and needed custom imagery that would focus on two of the Manpower group of companies' five brands—Manpower and Manpower Professional. While similar in their modern look and feel, the two brands had significant casting differences and wardrobe/style/background variations. Manpower needed a Custom Library™ of imagery that would support the Manpower and Manpower Professional brands while truly speaking to Manpower's wide range of clients and candidates. As a global company with over 4,400 offices in 73 countries, this meant casting real people from all over the world. Manpower came to OnRequest Images for help in producing and managing this complex project.

The Solution

OnRequest Images consulted with Manpower to determine the most efficient method for planning and producing this shoot. The complex casting required 22 different models of all ages representing eight global regions including the Philippines and Turkey. Leveraging their strong connections with a renowned Los Angeles casting director, OnRequest Images producers managed an in-studio casting in which over 440 people were reviewed and photographed in one day. Headshots of each model, along with corresponding ethnic background information, were sent to Manpower executives in each of their global regions for review to ensure authentically ethnic models would be chosen. Selecting from over 20 choices per model, Manpower could choose exactly the talent they were looking for at the click of a button.

The Results

The OnRequest OnPro™ team planned and produced the shoot on budget and on schedule. After three days of shooting, over 11,000 images were taken—approximately 500 shots of 22 models. OnPro image specialists reviewed and edited images of each model, providing Manpower executives with high-quality lightbox selections through an easy online workflow. "Our experience working with the team at OnRequest was excellent," stated Kristen Wright, Director of Global Branding. "From searching for our specific model needs to organizing and executing the shoot, their process is truly seamless. Our worldwide colleagues are very pleased with the new images and we will certainly be using OnRequest again in the future."

OnRequest
Custom Library™

Here's to the first 50 years.

– your partners at Leo Burnett

Allstate

1957 — 2007 and beyond