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The Wheel of Engagement: Exploring the Connection Between the Brand/Target Relationship, Brain Physiology, Human Psychology and the Laws of Marketing in an Ever-Changing World.

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**The Wheel of Engagement:
Exploring the Connection Between
the Brand/Target Relationship, Brain Physiology,
Human Psychology and the Laws of Marketing
in an Ever-Changing World.
by**

Daniel Greenberger

**An Abstract of a Project
in
Creative Studies**

**Submitted in partial Fulfillment
of the Requirements
for the Degree of**

Master of Science

December 2006

**Buffalo State College
State University of New York
Department of Creative Studies**

ABSTRACT

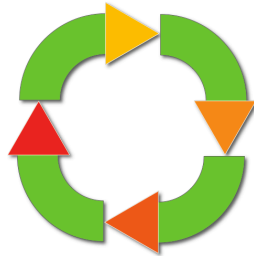
What happens when the sciences of brain physiology, human psychology and marketing collide with the science of creativity? Could this generate a massive impact leading to the Holy Grail of marketing—a rare insight into the code for building strong brand/customer relationships? As a veteran copywriter and creative director in the ad industry, my tools for gaining customer insight were limited to traditional research and strategy methodologies such as focus groups, interviews and surveys, and to my gut instincts. Once introduced to the science of creativity, I became curious about certain connections to human behavior—specifically connections between the physiology of the brain and the contributions of Abraham Maslow and Carl Jung to human psychology. These connections point to a controlling part of the human unconscious where the *Point of Emotional Impact* resides between a brand and its customer. This paper takes you on an expedition to that *Point of Emotional Impact* showing you how elements of Maslow’s Hierarchy of Needs and Jung’s archetypes intersect in the limbic system forming an indelible bond between a brand and its customer. Along the way, you will discover a model to describe this phenomenon and creativity tools to help uncover the right information needed to engage the model. This then, is a personal journey into learning and connecting, as well as a quest to give to my marketing communications agency a badge of distinction and calling card for new business.

Signature

Date

**Buffalo State College
State University of New York
Department of Creative Studies**

**The Wheel of Engagement:
Exploring the Connection Between
the Brand/Target Relationship, Brain Physiology,
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Dates of Approval:

**Daniel Greenberger
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SECTION I: BACKGROUND INFORMATION

Purpose: The goal of this project is to develop a new model and methodology for better understanding how marketing influences purchase decisions.

This project is both a significant opportunity and a critical requirement for the marketing communications firm of which I am co-founder and current Chief Innovation Officer. A 16-year-old agency, we have a record of being ahead of the curve within certain marketing trends. We were pioneers in integrated marketing. We were early adopters of efficient outsourcing models and business partnerships to provide better value for less cost to our customers. We developed media planning software that is still unique in the industry and has launched a sister media planning and buying company. While each of these “innovations” provided us with a way to talk about our agency in the past, they are no longer strong enough points of differentiation or add enough value to our clients. It is imperative for the agency to provide something so unique and valuable that current clients will never leave us and new clients will flock to us for help with their marketing programs. I have been asked by my partner to develop a proprietary approach to developing target insights that will lead to innovative marketing solutions.

Description: This project introduces a proprietary approach for uncovering a deeper, better insight that can be merchandised and embraced by agency prospects and clients.

At the center of this project is a model for understanding how strong brand/customer relationships are formed. Beyond that, this project began rather grandiosely with many complex facets planned beyond the development of the model. The following is a list of deliverables suggested in the project concept paper:

1. A model that shows what happens along several continua during the four-step marketing process defined as stimulus—reaction—rationalization—affinity. This model will be backed by significant research to support its validity.
2. A facilitated creativity workshop with the client and agency to uncover the brand DNA.
3. A facilitated creativity workshop with customers to understand their self-actualized vision and how the brand fits into that vision.
4. A methodology for synthesizing this information with observational research and other research techniques, including quantitative analysis and secondary research.
5. Sell-in/marketing materials to explain the value of model and methodology. This may include a PowerPoint presentation, brochure, whitepaper, case study, book and/or something else.
6. Finally, a reflection piece that will chronicle my journey both in terms of creating something new and leading change within my agency.

In reflection, this was quite a wish list filled with worthwhile output. While the final deliverables do not match the preliminary list exactly, great progress has been made in each area.

1. The model has been built.
2. The tool kit for a facilitated creativity workshop with *customers* has been developed with many of the tools being used on an ad-hoc basis either in other strategic planning workshops or by individuals answering the questions from a customer's point-of-view to gain insight into their target audiences. A full-blown customer workshop has yet to be planned and executed.

3. The tool kit for a facilitated creativity workshop with *clients* to uncover the brand DNA has also been developed, with the tools used more extensively in client workshops, but not yet as a full branding workshop.
4. The role of observational research has been assigned as a part of the tool kit for gaining an understanding of the necessary context for a message to a customer. Secondary research is another tool for uncovering context for the message. Quantitative analysis may have a role in the future for market segmentation and for proving the reliability and validity of selected new tools.
5. I have determined that two levels of explanation are required for the model. The first level is represented by the information included in this project report. Here I go through every step of the process, explaining how I got from brain physiology to Maslow to Jung to the model and the tools themselves. This is much more information than is useful in a sales moment. In fact, when I presented it as such to a select group in the agency, their glazed-over eyes said as much. This first level is, however, a good start for a potential business book on branding that I would like to pursue in the near future.

The second level of information is for sales. I've had members of the agency ask for the "30-second commercial." While I appreciate their desire to highlight the essence, the challenge here will be providing enough information so as not to lose the gravitas of the model. This is in development and will find its way into the sell-in materials.

6. This paper will serve as my reflection piece. It is a part of my project to which I look forward to gaining further enlightenment.

Rationale: This project represents the Holy Grail for all marketing agencies.

There are basically two products of an agency: strategies and the marketing campaigns, which are a manifestation of those strategies. Both are driven by “the insight.” Finding that deeper, better insight to customer behavior is a major pillar of differentiation in the agency world. As I mentioned before, it is the Holy Grail. When I started in the business at Foote, Cone and Belding, a top-ten worldwide agency, its program for finding insights was called, “Know the Consumer.” It required everyone in the agency to commit one night a month to call consumers on the telephone (during the dinner hour) and ask a list of questions generated by the research department on behalf of agency clients. While this program was not very popular with employees and the people they called, it did give FCB something to talk about when it pitched new business. As far as I know (and I was new to the business at this time) the program was more “fluff” than substance. I was never aware of any insights from these phone calls finding their way into the strategies from which I used to write advertising. When I returned to FCB six years later, it had a different insight gimmick—this one, at least, influenced by behavioral sciences. In this model, FCB researchers would ask questions of consumers about a certain product category and then, in quadrants, plot where the product category and the products in the category fit within the continua of rational to emotional and low interest to high interest. This enabled the strategists and creatives to better understand how to talk and what to say to the consumer. This model did help inform the agency’s products of strategies and marketing campaigns. In retrospect, this model gave me—an “agency creative”—a glimpse of the potential of finding better ways to mine insights from customers.

FCB had a large research department, with experienced practitioners and academicians dedicated to coming up with this proprietary model. FCB used the model to convince prospective clients that its strategies and marketing campaigns were better than any other agency's. It is rare for a smaller agency, such as ours, to develop an insight model. In addition, for any agency it's difficult to break new ground in such a well-traveled field.

In order for our agency to take the next step—to raise the level of its work—a new model for mining insights is critical. My original vision for creating an agency that will be vital and grow long after I've retired may very well depend on developing a differentiating approach to insight discovery that provides a sustainable competitive advantage for the agency. This project, then, will be a major part of my legacy to the agency and the marketing community.

Creative Contribution: We've set a Vision to become a top mid-size agency in the Midwest. This new approach to gaining customer insight will help us get there.

Recently, we set into place our first set of Mission/Vision/Purpose/Values in the agency's history. The Vision is to become a top mid-size agency in the Midwest. We currently have about 40 employees and will have to double or triple that on our way to realizing our vision. That formidable aspiration needs immediate and visible steps that lead to progress on this front. As an agency, we need to believe this is possible. Currently, some of our employees believe in themselves but not their colleagues. The rest of our employees don't even believe in themselves.

Our future is contingent on our ability to have an agency full of people who believe in themselves *and* believe in each other. We need people who are not just open to sharing and receiving, but proactively look to each other to share knowledge or seek knowledge. We need, for the lack of a better word, more “love” in the agency. This initiative is a great opportunity to provide the uniting force within the agency.

One might ask, “How can a new approach to customer insight unite an agency?” I believe the agency currently suffers from an inferiority complex common to many agencies large and small. Groucho Marx once expressed this phenomenon so perfectly when he said, *I would never join a club that would have me as a member*. GreenHouse is an organization hungering for an identity—something for employees to talk about with pride to others. Furthermore, with our values of curiosity and learning, we should recognize GreenHouse as a place that must attract employees who are seeking self-actualization. As such, we must provide something that makes these employees feel that by being part of something bigger, they themselves will become better. Given the right thinking and the right promotion, this project could do just that for the agency and its employees. If we become known industry-wide for having the state-of-the-art approach to finding a deeper, better insight, then the organizational psyche of GreenHouse might be transformed. All of a sudden, being part of GreenHouse will be seen as a step in learning and career development. “Employed by GreenHouse” will gain a coolness factor within the industry. Employees will have the confidence to seek and share information. We will win new accounts, attract better talent and become the Vision that we have set forth to be.

SECTION II: PERTINENT LITERATURE

Introduction: Connecting the thoughts.

When all was said and done, the conclusions drawn throughout this project came from connecting the thoughts of some giant thinkers in brain physiology, human philosophy, marketing and creativity. Specifically, I sought information about how the brain works, Abraham Maslow's Hierarchy of Needs, Carl Jung's archetypes and how other marketers have applied these principles to their work. Along the way, I pulled in thoughts from giants in the fields of creativity and business. Below is a discussion of my thought process and the literature that I found to support my conclusions.

It all starts with emotion. But where does it go from there...

The notion started with a belief that marketing communications is most powerful when it taps into an emotion of its target. Of course, this belief is one of those tenants of advertising that has been around for some time. Indeed, Google *Emotion in Advertising* and you'll get nearly 3,000,000 articles in .25 seconds.

In my circles, if someone stressed the importance of emotion in advertising, we all would nod our heads in agreement and then proceed to follow an agency standard strategic document that was written to appeal to the cerebral cortex or logic centers of our target's brain. Even our clients expect us to present the key rational benefit of their product or service. Clearly, communicating the most outstanding rational benefit of a product or service is our job first and foremost because that is what moves markets. Or is it?

It turns out that making personal decisions, which include purchase decisions, is decidedly an emotional function not a rationale one. An article from EurekAlert! (<http://eurekalert.org>) an online global news service operated by the American Association for the Advancement of Science provides vivid proof of this. In a study presented at the 87th Scientific Assembly and Annual Meeting of the Radiology Society of North America, (Shibata & Zhong, 2001) it was reported that when an individual is asked a simple personal question, such as preference for a warm bath or dinner, brain measurements show emotions at work (Neary, 2001). According to Dean K. Shibata, “The point was to test the hypothesis that when people make decisions that affect their own lives, they will utilize emotional parts of the brain, even though the task itself may not seem emotional” (§ 5). His findings corroborate the work of neurologist Antonio Damasio (as cited by Neary, 2001, p 6) who reported that his patients, who suffered brain damage to the part of the brain that governs emotion, have a difficult time making what appear to be routine, rational decisions for themselves (§ 6).

This turns the traditional advertising model on its head. Now, instead of first determining what logical benefit will move the customer to make a purchase decision, the question becomes what stimulus will spark an emotional response that moves the customer toward purchase. At first glance, this new proposition appears to be much more *squishy* than the traditional approach of finding a unique product benefit and then telling that story in an interruptive fashion so as to get the attention of the customer. But then, if it were that easy wouldn't all advertising be more consistently successful? What is required now is the “code” for making the *squishy* more concrete. How do we determine the stimulus to spark the right emotion to move our customer toward purchase?

What happens in the brain?

The first step for understanding how the code works is to understand how the brain works. The notion of left-brain being our logical center and right-brain being our emotional center has been largely disproved. However, the distinction between the different parts of the brain that control emotion and logic and how they interplay is both relevant and important.

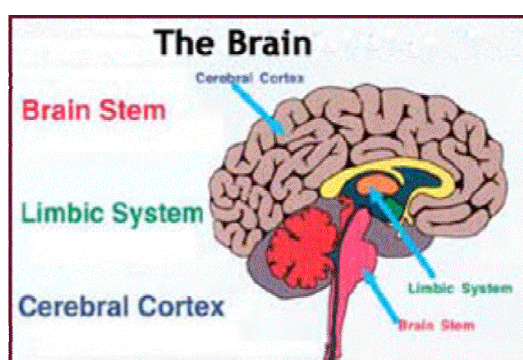


illustration from http://legendsprings.dvusd.org/human_brain.htm

FIGURE 1: Illustration of the brain

A simplified look at the brain shows three parts, each with distinct roles. The brain stem is often referred to as the “reptilian brain.” It’s here where the *fight, flight or freeze* instincts reside and in evolutionary terms is most primitive. Above the brain stem is the limbic system, sometimes referred to as the “dog brain.” This is common in mammals and is where much of our emotional response resides—where we get our intuitive gut emotional feelings. The cerebral cortex is the logic center of our brain, that which makes us uniquely human (<http://web-us.com/brain/aboutthebrain.htm>, 2005). So the first question to ask is how do these parts of the brain operate together while making a personal decision? Admittedly, the challenge in responding to such a complex question is finding an answer simple enough to be useful in the development of brand marketing.

Charles Q. Choi, in his article *Voting with the Heart* (2006), discusses how “emotion trumps reason at the ballot box” (p. 35) He cites a study (Burdein, I., Lodge, M. & Taber, C., 2006) that concludes that voting decisions are made first as an emotional response, *and then rationalized through logic*. “The enlightenment model of dispassionate reason as the duty of citizenship is empirically bankrupt,” reports Taber (Choi, p. 35).

If this is so, perhaps marketing must work deliberately on two levels. First, it must spark an emotion, and then, it must provide the right rationale to explain that emotion. That differs significantly from the traditional cart-before-the-horse advertising approach, which is to start with the right rationale and clothe it in an execution that emotes an emotional response. The next mystery, then, is what emotion do we tap and how do we tap into it?

Self-Actualization: The great motivator.

Self-actualization is a term first coined by Kurt Goldstein in 1939 and later used more specifically by Abraham Maslow (Maslow, 1987, p. 22) when he introduced his hierarchy of needs. Figure 2 represents a recent version of Maslow’s original 1954 hierarchy (Maslow & Lowery, 1998).

Maslow's Hierarchy of Needs

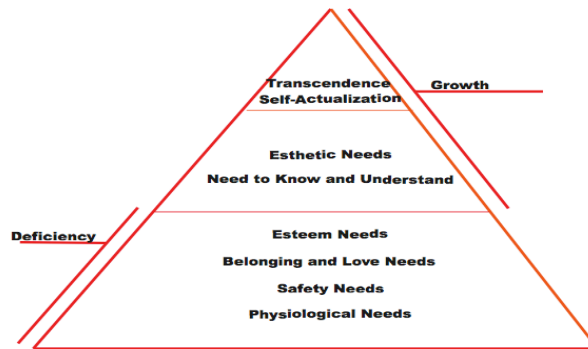


Illustration adapted from http://legendsprings.dvusd.org/human_brain.htm

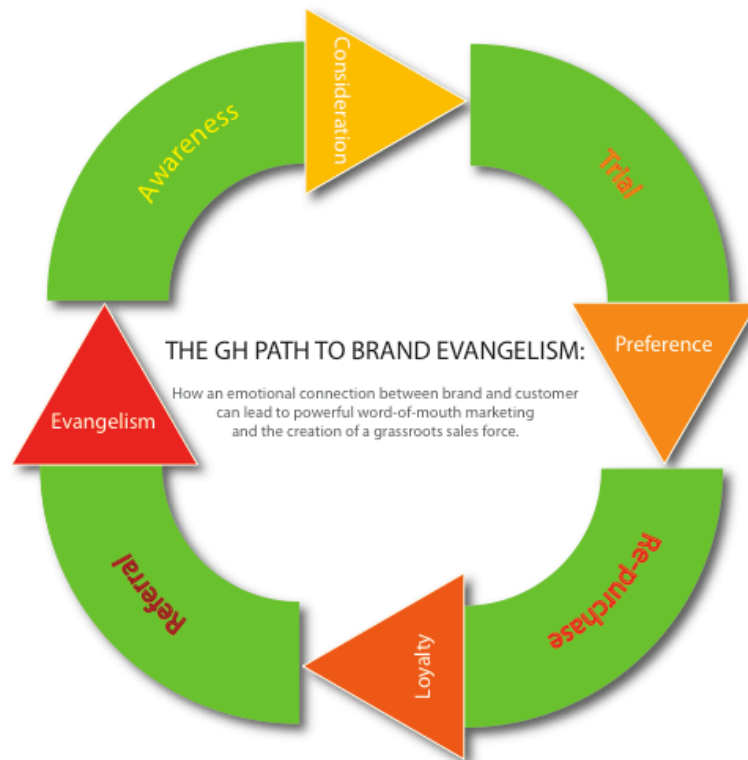
FIGURE 2: Maslow's Hierarchy of Needs

Maslow suggests that there are two categories of needs that motivate us as human beings: *deficiency needs*, which we are driven to satisfy, and *growth needs*, which we are drawn to meet (Jones, 1955,). The lowest deficiency needs must be met before the next higher need can be satisfied and so on. Maslow describes those needs from lower to higher as *physiological* (hunger, thirst, bodily comforts, etc); *safety/security* (out of danger); *belongingness and love* (affiliate with others, be accepted); and *esteem* (to achieve, be competent, gain approval and recognition). Growth needs ascend to *the need to know and understand*, *aesthetic needs* and finally, *self-actualization* and *transcendence*. The motivation to satisfy these needs in ascending order is deeply wired into our make-up on an emotional and unconscious level. Maslow referred to these as instinct like needs (Maslow, 1987, p.60).

Perhaps George Land's (1992) eloquent description of the universal creative force in his *Grow or Die Theory* both parallels and supports the ingrained nature of Maslow's hierarchy. Land and Jarman (1992) describe how every living organism in the history of life—any entity that grows in complexity over time—goes through a three-phase pattern of growth. The first phase, *forming*, is a time of exploring and inventing. In many ways, it's a phase when the *physiological* and *safety/security needs* are being addressed. *Norming*, the second phase, is when an organism extends and improves. It's a growth phase when the needs of *belongingness and love* and *esteem* followed by *the need to know* and *aesthetic needs* are being met. The third phase, *fulfilling*, which involves a breakpoint where the organism is integrating the new and different, could be seen as the beginning of self-actualization. For the organism to keep growing, and not die, these three phases must be followed by a phase of reinvention and transformation at which time the three phases begin anew. Within Maslow's hierarchy, this coincides with the level of transcendence.

In reference to Maslow, Land and Jarman (1992) acknowledge that focusing on meeting one's physiological needs hinders one's ability to tap into his/her creativity to achieve the higher levels needs. They maintain that our "quest for safety, security and comfort where there is orderliness, predictability, control and mastery leads to a general unwillingness to explore the unconscious world" (p. 155). In other words, a rational focus on those physiological needs keeps us anchored to the lower levels of the hierarchy. Therefore, the brand that taps into that rich unconscious and awakens the urges to self-actualize on an emotional level will win the day.

Interestingly, and consistent with Land's definition (1992) of a living organism (an entity that grows in complexity over time), when the brand helps its customers self-actualize, the brand also self-actualizes when its relationship with its customers ascends from awareness to customer evangelism for the brand. (See Figure 3)



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FIGURE 3: The Path to Brand Evangelism

Archetypes: a shortcut to the emotional unconscious.

From Abraham Maslow to Carl Jung. This is the path I chose to explore for reaching the emotional unconscious where personal decisions are made. After all, where else but the Collective Unconscious can you find the universal emotional imprints born within each of us?

Carl Jung explains:

"I have chosen the term 'collective' because this part of the unconscious is not individual but universal; in contrast to the personal psyche, it has contents of modes and behavior that are more or less the same everywhere and in all individuals. It is, in other words, in all men and thus constitutes a common psychic substrate of a suprapersonal nature which is present in everyone of us." (Jung, 1969, p. 3-4)

Jung admits that the Collective Unconscious would be of little use if there were no content that could be brought to consciousness. For that, he assigns archetypes, which is derived from the Greek words *arche* meaning “first” and *type* meaning, “imprint” or “pattern” (p. 52). These represent primordial images that have existed from humankind’s earliest history and manifest themselves in our conscious through primitive tribal lore, mythology, fairy tales and religion.

Having made this leap to archetypes as a shortcut to the emotional unconscious, I quickly learned I’m not the only one to have tapped into this rich arena. Several good books have already been written about the connection between archetypes, brands and marketing. One of the more insightful books, *Building Brands & Believers* by Kent Wertime, is all about connecting with consumers using archetypes (2002).

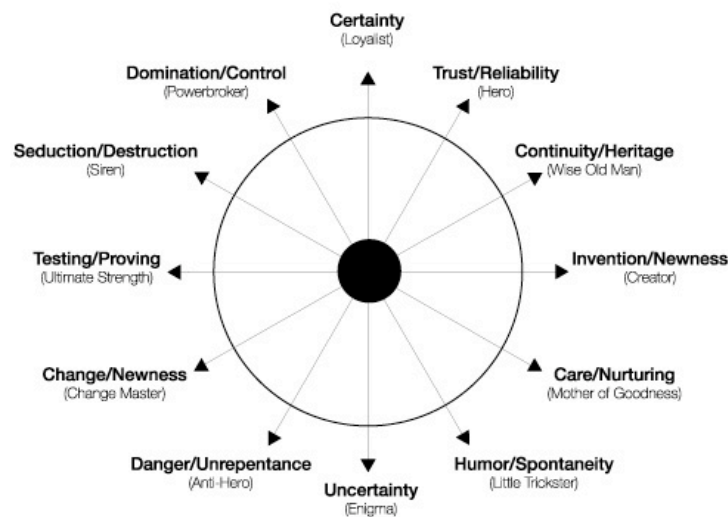
Wertime agrees that, “any effort to communicate with and motivate people should recognize that the persuasive power of communications must work in the far recesses of the mind where people’s emotions reside” (p. 62). In citing Jung, Wertime goes on to say, “Archetypes serve as powerful and persuasive motivators. In the depths of our unconscious, the universal images of archetypes mingle with our personal unconscious to help create personal ambitions and dreams” (p. 67).

In his explanation of the principle of self-imaging, Wertime states, “Consumers tend to gravitate to those things that reflect who they are, or at least who they think they are and aspire to be...In some cases they choose things that constitute their inner dreams...” (pp. 228-229).

In other words, the point of emotional impact is where brand archetypes intersect our dreams of self-actualization.

So exactly what does an archetype look like and how can we use it? Wertime does a fine job of developing Jung's archetypes into a useful chart he calls *The Archetype Compass* (p. 202). See Figure 4.

As you look at the archetypes that spring from our Collective Unconscious, you can recognize the strong imprint these figures have on us from our earliest memories of fairy tales and mythology. It's noteworthy that those archetypes opposite on the chart also represent roughly opposite traits (or at least represent an interesting contrast).



From "Building Brands and Believers:
How to Connect with Consumers using Archetypes"
by Kent Wertime

FIGURE 4: The Archetype Compass

These archetypes are further defined by the traits and values they represent. Wertheim includes some of the traits in his chart above. The key is to choose and consistently use the traits and values that are most attributable to the brand *and* most relevant to the customer. The archetype(s) then become shorthand for something both valuable and important to the customer. To take advantage of this way of shorthand communication, imagine developing a whole inventory of traits and values and assigning them to each archetype. Then, have the brand managers circle the traits and values that best represent their brand. This would provide an idea of which archetype(s) the brand might best use to tap into its customers' emotional unconscious. According to Wertheim (2002), a brand can represent multiple archetypes—either those that are in harmony or those with interesting contrasts (p. 203). Further, imagine asking the customer to go through the inventory of traits and values and circle those to which he/she aspires—those that would represent the higher levels of self-actualization. This is one of the tools currently being developed to help identify where brand archetype and customer self-actualization intersect.

The context and content of brand mythology.

Jung's assertion that archetypes are manifested in mythology (1969, p.5) reinforces the power of telling a brand's story. But how do we tell the story so that the brand's archetype(s) resonate with the customer? He further suggests the importance of context when he explains:

“Time and time again with my public I come across the difficulty that they imagine illustration by ‘a few examples’ to be the simplest thing in the world. In actual fact it is almost impossible, with a few words and one or two images torn out of their context to demonstrate anything...So it is with the individual images: they need a context and the context is not only a myth but an individual anamnesis.” (p. 189)

Developing context starts with a deep understanding of the brand/customer relationship and serves as a contract that confirms the brand's assumptions are in alignment with its customer's assumptions. Context is an agreement that the dynamics of the marketplace look the same to the brand as they do to the customer; that they agree on the brand's competitive set; that the brand understands the mindset of the customer at points of communication and purchase, and in general. Context helps the brand understand its barriers to growth or its opportunities for partnerships. In total, context serves as the "back-story" for a brand's mythology. The next job is to craft the content of the brand communication.

Content, on the other hand, is a synthesis of what a brand wants to tell its customers about its product or service and what the customers think is *cool* about the brand's product or service. The secret to content is to communicate just enough to push the emotional button and provide rationalization for the reaction. If this happens as quickly as a headline and picture, stop there. There is no profit for a brand to glaze over its customers' cerebral cortex with a long rational discourse over the benefits of its offering.

Together context and content are integral to the message strategy a creative team needs to build a brand. Add a deep understanding of the brand's archetypal ideas and the customer's sense of self-actualization, and you have a recipe for insight into building an unbreakable emotional relationship between the brand and its customers—just as the model prescribes.

A good theory...now what?

The workhorse of traditional qualitative research has been the moderator-run focus groups. As a valuable research tool, focus groups have been broadly questioned, yet they are still

prevalent within the marketing industry. Clotaire Rapaille explains in his book, *The Culture Code* that you just can't believe what people say (2006). Rapaille claims that,

“...the only way to understand what people truly mean is to ignore what they say. This is not to suggest that people intentionally lie or misrepresent themselves. What it means is that, when asked direct questions about their interests and preference, people tend to give answers they believe the questioner wants to hear.” (p. 14)

In my experience, I can add that in these focus groups, people say what makes them look good, what fits in with the group's thoughts, or even what they think they think. Rarely do they offer what they feel, deep down in their emotional unconscious. To tease out this information—the information needed to engage the model—different approaches need to be applied.

Rapaille (2006) uses nearly hypnotic excursions as a way to help people get in touch with their emotions on the deepest level. There are other good tools for gaining deep insight as well. Observational research, the use of creativity tools and tools developed specifically to help understand the emotional power a brand has with its loyal customers can also be utilized.

Instead of the traditional focus group, the opportunity is to use these new approaches to qualitative research to develop a “creative workshop” with the agency, clients and customers that brings out the emotional cues for making a strong brand/customer connection.

SECTION III: **PROCESS PLAN**

“How do I create? I grope.”- Albert Einstein

Introduction:

From the beginning of the project, I knew I wanted to use this opportunity to create something that I could leave as a legacy to my agency. In CRS635: Creativity & Change Leadership, I began to better appreciate the role of emotion in motivating behavior. I also began to think about how emotion might be a more significant driver in a customer’s purchase decision of a brand. While not a new concept in marketing, I thought if I could better understand how emotion actually drove the purchase decision, I might be able to develop a specific and proprietary approach to unleashing the power of emotional marketing for my agency. Thus started a process of groping with intermittent divergence and convergence as reflected by the timeline below:

| Month | Activity | Hours |
|--------------|--|--|
| August | <ul style="list-style-type: none"> • Developed plan for Master’s project • Developed workshop materials to get at emotional drivers for clients and customers • Continued development with new additions/ideas to workshop • Hypothesized that while emotion is the driver of a purchase decision, logic plays an important role in rationalizing the emotional reaction. Began researching this. • Changed course and created the four-step model explaining how strong brand/customer relationships are formed • Hypothesized that emotional connection is related to the role a brand plays in helping customer to self-actualize • Incorporated self-actualization into the model | <ul style="list-style-type: none"> • 8 hours • 15 hours • 10 hours • 4 hours • 6 hours • 1 aha! moment • 1 hour |

| | | |
|------------------|---|---|
| September | <ul style="list-style-type: none"> • Shared new model with agency colleagues, and colleagues involved in research and creativity. Got positive feedback; questions about self-actualization • Began researching Maslow • Hypothesized that what I had been calling the Brand DNA was really related to the archetype(s) that the brand represents • Incorporated archetypes into the model • Began researching Jung • Presented to selected agency colleagues; group had difficulty understanding model and making it relevant to agency's work | <ul style="list-style-type: none"> • 6 hours • 4 hours • 1 aha! Moment • 1 hour • 6 hours • 3 hours |
| October | <ul style="list-style-type: none"> • Began writing the narrative to the model to explain how and why it works • Began adapting and growing the tools from the original workshop in order to uncover the information needed to engage the model • Began using some of the tools with selected clients to determine their effectiveness • Sent narrative to partner for comments and questions; got positive feedback and made improvements. | <ul style="list-style-type: none"> • 10 hours • 10 hours • 10 hours • 1 hour |
| November | <ul style="list-style-type: none"> • Continued using tools with clients to determine their effectiveness • Wrote and presented PowerPoint of narrative explaining all the background research to agency leadership group • Began writing draft for the project final • Rewrote initial draft incorporating advisor's comments | <ul style="list-style-type: none"> • 12 hours • 6 hours • 16 hours • 8 hours <p>TOTAL 137 hours</p> |

FIGURE 5: Timeline Chart

SECTION IV: OUTCOMES

Introduction: A proprietary approach is now well on the way to being useful.

There are three fundamental facets of this project. The first is a Wheel of Engagement model (See Figure 6) that shows a four-step communication process that starts with a stimulus and ends with customer affinity to a brand. The second facet is the code (See Appendix B) that describes how the model is engaged through an understanding of brain physiology and human psychology. The third facet is a set of tools (See Appendix C) to help uncover the insights a brand can use to actually unlock the code and engage the model.

The Wheel of Engagement Model: How Marketing Influences Purchase Decisions

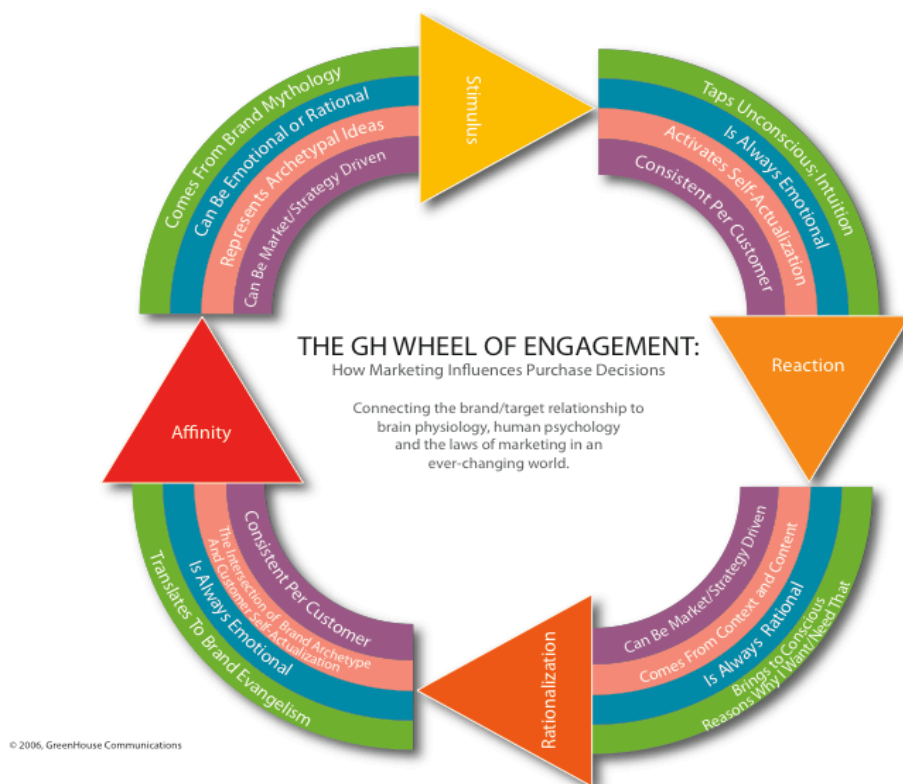


FIGURE 6: The Wheel of Engagement

Figure 6 describes what happens when a brand is connecting with its customers. It shows four points of impact in the engagement cycle: a brand stimulus, a customer reaction, a customer rationalization of the reaction and a resulting customer affinity for the brand. This becomes a cycle because, like with any good relationship, it must be consistently revisited to make sure it is on the right course.

The first point of impact, the stimulus, might be in the form of an ad, an event, a website—any communication moment the brand has with its customer. To maximize this moment, the substance of this communication should as consistently as possible come from the brand mythology. In other words, it should deliver the archetypal ideas the brand represents while highlighting that which makes the brand great. The core of the communication might be an emotional or logical message. And it can change over time depending on changes in the product or the marketplace.

The second point of impact, the reaction, happens in the customer's limbic system. It is intuitive and it's what signals whether something is "cool" or not to the customer's unconscious. This is consistently an emotional reaction, and it's the connection a brand must consistently maintain in order to form a strong bond with the customer.

Immediately following the emotional reaction is the third point of impact, the rationalization. This is when the cerebral cortex takes over and provides a conscious and rational explanation for the initial unconscious emotional *Reaction*. There is always some kind of logic involved with which the customer can explain why he/she wants or needs what the brand offers. And, of course, that logic may change as the brand message or *Stimulus* changes.

The final point, Affinity, is what happens when a brand has pressed the unconscious and intuitive “cool” button in the limbic system and then provided the right logic in the form of context and content to help the customer rationalize a strong emotional connection to the brand. This is the kind of emotional connection that when consistently nurtured is difficult, if not impossible, to unseat with a logical appeal alone.

The Code: A revelation of clues for engaging the model.

To understand how to engage the model, it’s helpful to understand the *Code* (See Appendix B) that describes why and how the model works. The four *Clues* to understanding the *Code* are as follows:

Clue #1: A look at brain physiology

We know that personal decisions are made first unconsciously on an emotional basis in the limbic system. *After* the emotional response, one’s brain then rationalizes that reaction using the cerebral cortex (Choi, 2006).

Now, what might trigger that initial unconscious emotional reaction?

Clue #2: Our desire to self-actualize drives human motivation on an unconscious emotional level.

According to Abraham Maslow (1967), we all have a basic hierarchy of needs. When we have fulfilled one level, we are naturally motivated to fulfill the next higher level. In as much as a brand can help its customer fulfill a need, it is touching its customer on a deep, emotional level.

Now, what’s the path to get the initial unconscious emotional reaction?

Clue #3: Archetypes are a shortcut to the emotional unconscious in all of us.

Carl Jung describes archetypes as primordial images that have evolved into the Collective Unconscious and are present in each of our psyches at birth (1969). They are deep, emotional images that can trigger an unconscious reaction. A brand, then, needs to identify the archetype(s) it best represents and build a consistent and pervasive brand experience around the traits and values of the archetype(s). Where those traits and values intersect with the traits and values of the customer's dream of self-actualization is the brand's shortcut to its customer's emotional unconscious.

Now, how does a brand communicate its archetypes?

Clue #4: Brand Mythology springs from presenting archetypal ideas within the context of a customer's life and with the content most compelling to the customer.

As unconscious primal images, archetypes are manifested consciously most often through mythology, fairytales and religion (Jung, 1969). Not a bad way to think about a brand story when trying to cultivate brand evangelists. To have the desired emotional impact, the brand mythology must also provide a good context for understanding the purpose and meaning of the story, and appropriate content that is both relevant and compelling.

Now, how does the brand find the insights that inform the code and provide the trigger to engage the model?

The Tools: Mining for insights that informs the code.

There are a variety of nontraditional qualitative research tools that can help inform the code, including mind excursions for exploring emotional depths, and completing the statement, *It would be great if...* for exploring archetypes on the brand side and self-actualization on the customer's side. These tools, which are described in Appendix B, can be used individually on an ad hoc basis or as part of a branding workshop with the marketing agency, its client and the client's customers working together to mine the insights needed for building strong brand connections. Compare the information that might be gathered through a branding workshop using some of these tools with the information gathered from traditional focus groups to help build a strong brand strategy, and you'll find it similar, only seen through a new and different set of lenses—lenses that reveal where the emotional connections can be made between the brand and its customer.

Another valuable research methodology, particularly for understanding the context of the brand/customer relationship, is observational research.

SECTION V: KEY LEARNINGS

“What a long, strange trip it’s been.” — the Grateful Dead

Introduction:

I’ve spent my adult life creating commercials, print ads and all sorts of marketing materials, so creating highly visible products is nothing new for me. This project allowed me to use my experience as an advertising copywriter/creative director and enter a completely new marketing domain to create something unique—a proprietary approach to insight and innovation. Big agencies spend significant time and money to accomplish what I’ve set out to achieve. Because it required applying my creativity in a new domain, this may be the creative piece of which I’m most proud in my agency career.

“There is always more to do than there is time to do it.”

—David Allen, Founder, David Allen and Co.

Content:

There is so much written about each of the elements that I pulled together to build the model for building strong brand/customer relationships. From a content perspective, the keys were choosing which sources to read, and synthesizing the information in a way that worked together to describe the complex phenomenon of brand loyalty.

Working from the premise that the most effective marketing communications appeal to the emotions started me on a one-foot-in-front-of-another path to discovery.

The first question was, how does the brain work to make that so? I had heard of the old left-brain/right brain distinction. On further review, I learned that it wasn’t left brain/right brain as

much as it was the limbic system of the brain that controlled emotion on an unconscious level. Further research shows that, while personal decisions are made emotionally, people often need to rationalize those emotional decisions (Choi, 2006). This gives logic its rightful place in building a strong brand/customer bond.

The second-step question was, why does emotion, and not logic, rule decision-making? Many brands have long been seen as “status symbols” for its loyal customers. To me, Mercedes Benz says *I am powerful* and *I have arrived* while Dannon Yogurt says, *I am healthful and intelligent*. So what is that all about? The answer came in the form of Maslow’s Hierarchy of Needs and the innate desire we have to self-actualize.

The third-step question was, if a brand can play a role in helping its customers to “self-actualize,” what is the stimulus on an unconscious, emotional level (which is where personal decisions are made) that places that brand in that role? What do Mercedes automobiles do to the unconscious emotional part of our brains to become the symbol of power and Dannon a symbol of health? The answer to that appeared to be an archetype as defined by the Collective Unconscious in Jungian psychology (Wertheim, 2002, p. 60). Archetypes are evolutionary imprints that live in the unconscious from birth. They are pure emotional shortcuts to a defined and predictable set of values and traits. The manifestations of these archetypes—the way we describe them in our rational conscious—resemble fully self-actualized, mythical beings (Jung, 1969).

The fourth-step questions were, how does a brand identify which archetype(s) it represents and then how does it connect to its customers desire to self-actualize? With these questions, we’re off and running down the path of learning how to engage the model to help brands develop strong emotional bonds with their customers.

This is where we begin the line of inquiry that we hope leads to the intersection of the brand archetype and the customers desire to self-actualize. The tools we have developed thus far for this inquiry are in Appendix C.

There is still much more work to be done to realize the full potential of this approach to customer insight and branding. However, even as it stands now, there are valuable pieces of this approach that can be used to better inform any traditional approach now being used.

"You could design a process to catch everything, but then you're over processing. You kill creativity. You kill productivity." —Alex Lee, president of OXO International

Process:

For the first two weeks of the semester, I based our new approach for finding consumer insight on a strategic planning workshop I had developed and facilitated for several clients. My notion from the beginning of this course was that we had been getting some interesting answers to the questions we asked in the workshops and that there might be a branding model that could come out of those questions. When I built my original timeline for this project, it was based on further developing the workshops.

The foundation of the workshops was Creative Problem Solving focusing on key initiatives. The result of the workshops was a robust generation and socialization of ideas and information focused on specific goals established by the client in the workshops. The clients enjoyed great energy and success capturing information, identifying gaps in knowledge, gaining insight and developing strategies and tactics to achieve their goals. But at its essence, this approach by itself

did not significantly break new ground, nor was it merchandisable to prospective clients and the business community at large.

Within the first two-week period, I would show my progress on this approach to select colleagues and get positive feedback one day, only to incubate overnight and come back the next day with major additions or changes. After two weeks of this, while discussing the latest iteration of this approach with a colleague, we concluded that we were developing “flavor-of-the-day ideas” and nothing yet that could endure past the dawn of the next morning. This was valuable, because it forced me to think about the issue in a different way.

From the beginning, I based my thinking on the premise that the most effective marketing communications appealed to the emotions, or right brain as I then assigned it. This is not a new notion in my field, although it’s still not universally known, accepted or applied. In a *Eureka* moment, certainly aided by significant incubation, I sketched out a repeating communication model that included four steps: stimulus, response, rationalization, and affinity. This set off an iterative process of theory to research to discovery to next theory and so on until a model, a narrative for the model and a set of tools for engaging the model were developed. Along the way, the model endured beyond the dawn of the next morning only to be enhanced and improved along the way.

Not surprisingly, coming up with the “idea” and selling it through an organization require different processes and skills. Believing that any exercise in *creativity* achieves *innovation* status only if implemented, I planned to introduce the model to the agency. The audience proved to be more skeptical than anticipated.

A little context might be in order here. My partner and I recently brought on new leadership to take the agency forward. This meant another period of great transition for an agency that has been changing dramatically for the last two to three years. The new leadership is busy getting the right people in place, determining how to market the agency to new business prospects, implementing its own processes and approaches to strategy, creative development and workflow, and establishing its own leadership style. They are moving quickly yet, they have one of the agency owners (me) developing a new approach to mining consumer insights that might be a lynch key to their efforts. This may have created an initial barrier for me to gain support for the work I was doing.

My assumption, as I first began including others in any of the new work I was doing, was that those who heard my ideas would help me build and improve on them. What in fact happened was that they heard and criticized the new approach, with no inclination to be part of the development process. They were thinking, “show me” when I was thinking, “help me.”

This was a key learning for me. It reinforced that there are many personalities and styles with which one must deal in the workplace. Not everyone is as open to my new thinking as I had hoped. I decided to reevaluate my first inclination, which was to share my work throughout the process, hoping to use the vast resources of the agency to develop an approach we could all “own” from the beginning. Instead, I chose to protect the work I was doing, sharing it with a select few to help nurture it, until I thought it was sufficiently well developed to protect itself.

This then is the dilemma of someone creating something perceived as “threateningly” new (and I believe most things new are perceived as threatening): should the creator include others in

the creative process or make the idea as bulletproof as possible before showing it to anyone. In this case, I chose to not give up on a good idea that was given little consideration by others who had been invited in for early feedback.

I have presented the idea to many others since those early trials. I continue to get both positive feedback and some glazed-over eyes. However, facilitating purposeful feedback has helped me immeasurably in understanding where this work needs to go. While the development of this project went from hypotheses to model to code to tools, most questions are in regards to the tools, or, “what do I do with this model and code?”

Just because I developed the tools last, doesn’t mean that’s where we should keep it in our presentation. I’m learning that we are spending too much on our research proving the model and not enough time showing how to engage it.

Finally, the pockets of acceptance of the work reflected in this project are growing. Select teams are using parts of it in the work for their clients. The opportunity—no, the need—for this new consumer insight and branding approach becomes clearer as we work to create the *GreenHouse Experience* for our clients and as we ultimately use it to help define the GreenHouse brand, itself.

SECTION VI: CONCLUSION

"Leadership is an unbelievably hard communications job."

—Paul Danos, Dean, Tuck School of Business

Introduction:

There are two concepts that stand out as important learning for me from this project: one is a somewhat startling reinforcement of truth I already knew, the other a tantalizing concept new to my consideration set.

The first learning is reflected in the headline of this section. Affecting change *is* hard. People want to do what they've always done, particularly when they perceive that they have had some success doing it. Why fix it if it ain't broke? Some people have an attitude that if it wasn't invented here (meaning in their own brains) it can't be of any use. To add to that, this new approach I'm offering seems counterintuitive to a traditional marketing approach. Resisting something new, of course, is human nature and not always its best part.

For someone trying to affect change, there is a tightrope to walk. Fall down on one side and you protect your ideas so much you act like those who are attacking it. Fall down on the other side and you run the risk of changing your idea so much that it doesn't accomplish what you set out to do. In fact, after it goes through committee, it may not accomplish anything at all. I've been walking this tightrope, choosing to protect my ideas until they can be fully nurtured. That's not to say I haven't exposed them to the naysayers throughout the agency...I have. And I have taken their comments to heart. It's just that I haven't given up because I have received enough

positive feedback to know that there is great potential in this thinking. I will continue to work on my communications to help this project lead change in our agency.

The second learning was quite a bit more surprising and, I must say, more satisfying. In the past, the concept of synchronicity to me was more a matter of accident than design. In fact, in my vocabulary synchronicity was a synonym for coincidence. Little did I consider that if one set his sights on a goal, that it is possible for the world to align and help him achieve his goal. (Dare I say destiny?) Perhaps this is why I chose to protect my ideas and not let them be dismissed by the inflexibility of others.

In a synchronous way, this new idea of synchronicity as a force one can align for personal purposes seemed to pop up often. Of course, I read about it in Julia Cameron's *The Artist Way* (2002) and heard about it in the video, *The Secret* (2006). It also played a prominent role in Land's and Jarman's book, *Breakpoint and Beyond* (1992), which I recently completed. The fact that every hypothesis I imagined had been corroborated by someone else's work seemed incredible at the time, considering my hypotheses were just hunches. Articles seemed to come out of the woodwork supporting these hunches. The fact that creativity tools I've only recently learned and books recently read fit so nicely into the makings of this model seemed too accidental to be real. That the project took off once a visual model was conceived was surprising in that building visual models is not my normal method for explaining things—I'm a word guy.

Now, I find myself a bemused believer who hopes to be able to better harness this thing called synchronicity in the future.

Next Steps: What I see myself doing is...

Work with David Vukits and others to accomplish the following:

- Retrofit case studies of successful brands (e.g. Nike, Apple, Jeep, etc.) into the model to help validate approach.
- Continue to seek input and buy-in for this new approach by key constituents within the agency.
- Develop the final tools for the model, specifically the Values and Traits Inventory and Grid, and the Guidelines for Observational Research. Also want to explore excursions as a means for gaining insight as well as a contextual question that will help us determine which creative phase in Land's model of growth a brand's customer might be in when the decision to purchase is made.
- Use the tools in an ad hoc manner for select clients to see how they perform.
- Further develop a strategy document that comes from the information and insights gathered by using the tools. Show strategy to creative team to judge value of information provided to them through this new approach.
- Highlight the essence of the model, code and tools in a way that can be merchandised to current and prospective clients.
- Find experts in Research, Marketing, Business, Jungian Psychology, Brain Physiology and Creativity to read and provide comment from each perspective.
- Write an article for publication in a significant marketing trade magazine.
- Further develop the workshop concept and facilitate one to see what kind of information and insights we get.
- Finish the Pocket Guide to Building Strong Brand/Client Relationships and get it published.
- Consider presenting concept at CREA in April.

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APPENDIX A

GLOSSARY OF TERMS

APPENDIX A

GLOSSARY OF TERMS (for the purpose of clarifying their meaning within the context of this project)

Affinity

An attraction to or liking for something, i.e. a customer for a brand.

Archetype

From Greek, meaning *first imprint*, archetypes represent primordial images that have existed from humankind's earliest history.

Archetypal Ideas

The manifestation of archetypes as super beings, which can be observed and discussed consciously, e.g. the hero, the trickster, the mother of goodness, etc.

Brand

The unique imprint that a company makes on the consumer through every touch point between the customer and brand. This includes everything from logo and design to marketing tactics to customer service and more.

Brand Evangelist

A customer who loves the brand so much, he/she recommends it to anyone who will listen.

Brand Mythology

The brand's story using archetypal ideas as a shortcut to connecting with the customer's unconscious emotions in order to positively influence purchase decision.

Cerebral Cortex

The top layer of the brain responsible for, among other things, rational thinking. It's the part of the brain that makes us uniquely human.

Collective Unconscious

An inherited part of the psyche where universal archetypes reside.

Consumer

Any person who might purchase a brand's product or service.

Content

The synthesis of what you want to tell your customers about your product or service and what your customers think is *cool* about your product or service.

Context

An understanding of the customer's mindset at points of communication and purchase, as well as in general. Context serves as the "back-story" for a brand's mythology.

Customer

Any person who is already purchasing a specific brand's product or service.

Emotion

A reaction that takes place unconsciously in the limbic system in order to help individuals make personal decisions.

Hierarchy of Needs

From Maslow, it describes human needs from the most basic to the most evolved as follows: physiological needs, safety and security needs, love and belonging needs, esteem needs and ultimately, self-actualization or the constant desire to fulfill one's potential.

Insight

A peek into the emotional psyche of a brand's customer or potential consumer that identifies a connection to the brand's mythology, and thus becomes a foundation for building a marketing strategy.

Integrated Marketing Communications Agency

An organization that helps brands market their products and services using whatever medium, or combinations of media, that works best, including advertising, direct marketing, public relations, interactive, promotions and more.

Jung, Carl

A Swiss psychiatrist and founder of analytical psychology. He proposed the ideas of the Collective Unconscious and Archetypes.

Limbic System

The middle layer of the brain responsible for, among other things, emotional response. Often referred to as the "Dog Brain" it is common among mammals.

Maslow, Abraham

A 20th century American psychologist noted for his proposal of a hierarchy of human needs.

Marketing Strategies

A recommended way to sell products/services based on an understanding of the brand's objective, its current customers and potential consumers, the brand and brand product/service, and the competitive market within which it is being sold.

Medulla Oblongata

Also known as the "Reptilian Brain" or "Gator Brain," this is the part of the brain stem responsible for our "fight, flight or freeze" impulses.

Model of Engagement

A four-step process that shows how marketing communications influences the purchase decision and ultimately brand loyalty.

Path to Brand Evangelism

Beginning with awareness, the path a customer follows to become a brand evangelist.

Point of Emotional Impact

Where a brand's archetypal traits intersect with the customer's vision for self-actualization.

Rationalization

The logic a customer uses to understand an unconscious emotional reaction.

Reaction

The emotional response to a stimulus, which happens in the limbic system and tells the customer whether or not to be motivated toward purchase.

Self-Actualization

To fully realize one's potential.

Stimulus

Any communication moment the brand has with its customer, e.g. an ad, an event, a website, etc.

APPENDIX B

THE MODEL CODE (POTENTIALLY THE POCKET GUIDE TO BUILDING STRONG BRAND/CLIENT RELATIONSHIPS)

APPENDIX B

BOOK TITLE:

The Pocket Guide to Building Strong Brand/Client Relationships

What is a brand?

SUGGESTED VISUAL: NIKE SWOOSH IN THE “GUT” OF AN ILLUSTRATED ATHLETE

Marty Neumeier, in his book *The Brand Gap* (2003), says, “A brand is a person’s gut feeling about a product, service or company. It’s a GUT FEELING because we’re all emotional, intuitive beings, despite our best efforts to be rational” (p. 2). Thank you, Marty. Your definition of a brand serves as a perfect transition for the discussion of the GreenHouse Wheel of Engagement, a model designed to describe and provide tools for uncovering the secrets to the Brand/Customer relationship.

Establishing a brand gets harder and harder

SUGGESTED VISUAL: MORTICE OF MEDIA AND BRAND VISUALS

This is not your parents’ marketing environment. The game has changed. Gone are the days when customers picked from a handful of major brands. Today, brand proliferation has made it virtually impossible to distinguish the benefits of one brand from another. Just consider the explosion of house brands and generic brands in recent years. Gone are the days when broadcast, print, direct mail and outdoor boards were the only media considered in a marketing mix. Today, we receive advertising messages at the movies, sporting events, our bus stops, in our train cars and on our cell phones, while shopping and, of course, over the Internet. Sponsorships, product placement, promotional partnerships, mobile and word-of-mouth marketing and a plethora of other strategies make marketing messages a ubiquitous part of our everyday life.

Some brands do it better than others

SUGGESTED VISUAL: PREVIOUS PAGE SIMPLIFIED TO SHOW ONLY ENDURING BRANDS

So, why are some brands better than others at connecting with and establishing a long-term relationship with their customers? Do they offer better products, or a better emotional experience? To understand this requires revisiting the basics of human nature and the way our brains work. In short, emotion moves the world and logic rationalizes the reasons why. And here's why.

A review of the human brain

SUGGESTED VISUAL: ILLUSTRATION OF BRAIN

There are three parts to the human brain: the medulla oblongata, the limbic system and the cerebral cortex. The medulla oblongata or brain stem is often referred to as the reptilian brain. This is where our *fight, flight* or *freeze* responses reside. The limbic system, or dog brain, is where much of our emotional response resides. It's here where we get our intuitive gut emotional feelings. The cerebral cortex is the logic center of our brain, that which makes us uniquely human.

Are we really controlled by the “dog” brain?

SUGGESTED VISUAL: HIGHLIGHT BRAIN FUNCTION

Research shows us that personal decisions are made first in the limbic system and then rationalized by the cerebral cortex. In a study of individuals suffering from damage to their limbic system, it has been observed that these individuals are unable to make even the simplest personal decisions like where to have lunch. They are able, however, to offer logical suggestions for lunch to others. So, as Malcolm Gladwell describes in his book *Blink*, (2005) a personal decision, such as what brand we choose, can happen through an unconscious emotional connection in the limbic system before we have a chance to think about why it happened. Then that decision goes to the cerebral cortex to consciously explain the “reasons” for our emotional reaction.

A Hummer of a story

SUGGESTED VISUAL: PICTURE OF HUMMER

A look at the Hummer automobile might provide a case study for this phenomenon. Logically, a Hummer is not a very practical vehicle. It gets terrible gas mileage in an age of rising gas prices and environmental sensitivity. It’s too big for the roads and hard to park. It rides like an army truck. Yet, for those who love their Hummers, there is a definite, immediate and unconscious emotional connection that signaled, “cool” to their limbic systems. When you ask an owner of a Hummer what’s the attraction, you might get, “I can see over traffic” or “I do a lot of carpooling” or even “It makes me feel powerful.” But it is the emotional connection that is the driver of this relationship.

The secret to brand loyalty

SUGGESTED VISUAL: PICTURE OF A TAIL-WAGGING DOG W/CAPTION: DOG BRAIN

Why is the importance of an emotional connection important to know? It's the secret to brand loyalty. Most brands are built to reach the cerebral cortex rather than the limbic system.

Marketing wars often emphasize the logical benefits of a brand rather than tap into its emotional core. This is a mistake, because it's easier for a brand to displace a relationship based on logic with better logic than it is to displace an emotional connection. For example, *new and improved* for one brand does not often displace the emotional connection of *this is the brand my mother always used*. And in this day of product proliferation, *new and improved* lasts only so long until competitors match it and eventually *new and improve* it.

A look at The Wheel of Engagement

SUGGESTED VISUAL: WHEEL WITH FOUR ARROWS LABELED

Effective marketing, as we see it, is a four-step process: a *Stimulus* begets a *Reaction*, which begets a *Rationalization*, which leads to an *Affinity*. This is perfectly aligned with the way our brain works, first making decisions in the limbic system and then rationalizing those decisions in the cerebral cortex. It is also necessarily cyclical, because as any relationship grows, it must change and evolve over time to stay relevant and strong.

First there is a *Stimulus*...

SUGGESTED VISUAL: FILL IN STIMULUS ARROW

It might be in the form of an ad, an event, a website—any communication moment the brand has with its customer is a stimulus. To maximize this moment, the substance of this communication should as consistently as possible come from the brand DNA. In other words, it should reflect what makes the brand great. The core of the communication might be an emotional or logical message. And it can change over time depending on changes in the product or the marketplace.

...then a *Reaction*...

SUGGESTED VISUAL: FILL IN REACTION ARROW

The reaction, as we've already described, happens in the customer's limbic system. It is intuitive and it's what signals whether something is "cool" or not to the customer's unconscious. This is consistently an emotional reaction, and it's the connection a brand must consistently maintain in order to form a strong bond with the customer.

...followed by a *Rationalization*...

SUGGESTED VISUAL: FILL IN RATIONALIZATION ARROW

Now is when the cerebral cortex takes over and provides a conscious and rational explanation for the initial unconscious emotional *Reaction*. There is always some kind of logic involved with which the customer can explain why he/she wants or needs what the brand offers. And, of course, that logic may change as the brand message or *Stimulus* changes.

...finally, there's an *Affinity*

SUGGESTED VISUAL: FILL IN AFFINITY ARROW

Affinity is what happens when a brand has pressed the unconscious and intuitive “cool” button in the limbic system and then provided the right logic in the form of context and content (more on this later) to help the customer rationalize a strong emotional connection to the brand. This is the kind of emotional connection that when consistently nurtured is difficult, if not impossible, to unseat with a logical appeal alone. In fact, the more the brand can be connected to the customer's sense of self-actualization, the stronger the bond. This ultimate connection is supported by Maslow's Hierarchy of Needs and Jungian Archetypes, both of which play into creating an emotional *Reaction* that leads to an emotional *Affinity*.

Maslow's Hierarchy of Needs

SUGGESTED VISUAL: MASLOW'S PYRAMID

How does a brand first connect to the limbic system of the brain? This is the secret of all great brands. To explore this, we turn first to the social sciences and to Abraham Maslow's Hierarchy of Needs (1987). Maslow describes human needs from the most basic to the most evolved as follows: physiological needs, safety and security needs, love and belonging needs, esteem needs and ultimately, self-actualization or the constant desire to fulfill one's potential.

The role a brand plays in helping its customer self-actualize

SUGGESTED VISUAL: WHEEL AND PYRAMID TOGETHER WITH ARROW POINTING FROM ONE SELF-ACTUALIZATION TO OTHER SELF-ACTUALIZATION

The higher the level at which a brand/customer relationship is established, the more powerful the emotional connection. For example, the fulfillment of physiological needs and safety/security needs are often communicated through a rational message that the brand tastes better, is better at quenching thirst, helps you sleep better, etc. Many brands make these claims and are subsequently lost in the clutter of claims. Those brands that connect emotionally to customers by helping them feel as if they belong to a select group and are admired for their choice—or even that the brand plays a role in helping fulfill one's potential, ultimately will win the brand marketing battle.

Nike's *Just do it!* campaign is a good example of a brand that ascended to self-actualizing status. Not only is Nike your shoe, but also it is your entire workout wardrobe, your teammate, trainer and coach, pushing you and helping you to seek and fulfill your athletic and personal potential.

The role a customer plays in helping a brand self-actualize

SUGGESTED VISUAL: BRAND EVANGELISM WHEEL

When a brand can help its customer self-actualize, an interesting thing happens—the brand self-actualizes, too. The path to brand self-actualization goes like this: First there is customer awareness of the brand which leads to consideration; then a customer tries the brand, which leads to brand preference; the customer then repurchases the brand which leads to brand loyalty, and finally, the customer refers the brand to her/his friends, which leads to customer brand evangelism. Here, the customer is actually helping the brand to reach its potential, thus, in a sense, helping the brand to self-actualize. And what better manifestation of brand self-actualization than becoming a brand that literally sells itself through its customers?

The Power of the *Archetypal Ideas*

SUGGESTED VISUAL: PICTURE OF CARL JUNG WITH ARCHETYPE SYMBOLS

ORBITING HIS HEAD

Carl Jung (1969) describes the collective unconscious as the inherited part of the psyche where universal archetypes reside. Archetypes, then, manifest themselves from our unconscious to conscious mind through emotions and values, which arrange themselves into patterns to make up primal forms called archetypal ideas. Some of Jung's archetypes go by the names of *The Shadow*, *The Anima (female)* or *Animus (male)*, *The Syzygy (Divine Couple)*, *The Child* and *The Self*. You may know them better by specific examples of their personifications, like Satan (*The Shadow*), Wonder Woman (*The Anima*), Superman (*The Animus*), the King and Queen (*The Syzygy*), the Baby Jesus (*The Child*) and the Devine Spirit (*The Self*). Providing singular examples of Jung's archetypes hardly do them justice, however. Each archetype may represent a whole range of emotions and values. While the evil Satan may represent one end of *The Shadow* spectrum, characters such as Batman, whose exotic and mysterious nature qualifies him as a *Shadow* archetype, occupy the other side. Archetypes, then, are the mythological manifestations of a common inventory of emotions and values we all share. Their power in communication comes from the shared unconscious images into which the archetypes tap. *In other words, they are the path successful brands take to find the enduring emotional connection with their customers.*

The Emotional Point of Impact:

Where brand *Archetypes* and customer's *Self-Actualization* intersect

SUGGESTED VISUAL: MASLOW'S PYRAMID WITH SUPERMAN FLYING INTO POINT

One way to describe Archetypal forms is by assigning them a set of traits. Superman, as an archetype, is strong, smart, brave and always looking to fight evil. These traits are certainly worthy of esteem and paint a picture of a man striving to reach his potential. In a very real sense, Superman has achieved the top of Maslow's self-actualization hierarchy. Other traits such as motherhood, power, loyalty, wisdom, creativity, heroism and sensuality, when in archetypal form, also represent fulfilled aspirations of self-actualization. Even the anti-hero (think Harley Davidson), the enigma (think Marlboro) and the joker (think Vodafone), inspire esteem when self-actualized in archetypal forms. In as much as customers aspire to move up the ladder toward self-actualization, they will emotionally connect with the brands that best represent their idea of the self-actualized archetype to which they aspire. Nike leveraged this beautifully with its "Be Like Mike" campaign with Michael Jordan representing the archetypal *Animus* symbol.

Building your *Brand Mythology* through *Archetypes*

SUGGESTED VISUAL: CHART FOR IDENTIFYING TRAITS/VALUES/EMOTIONS OF ARCHETYPES

As the basis for classic and modern mythology, archetypes are a shortcut to the emotional unconscious. Moreover, archetypes are shorthand for a pattern of emotions and values that are *predictable* and *meaningful*. Predictability and meaningful relevance, then, are compelling reasons to match brands with archetypes that connect emotionally with their customers. By assigning traits and values to each archetype and identifying the ones that match both the Brand DNA and the customer's aspiration for self-actualization, a brand can make a powerful, enduring connection. That's not to say our goal is to identify only one archetype per brand. A brand may exhibit traits of complementary archetypes or even interesting contrasting archetypes, but those combinations must resonate with the customer and be consistently on display. From this exploration into traits and values of archetypal ideas, a brand can begin to develop its own powerful mythology. This mythology, if evident at every brand touch point, will create a reliable brand experience that will nurture a lasting emotional connection between the brand and its customers.

Using *Context* and *Content* to develop a *Brand Mythology* Story

SUGGESTED VISUAL: ILLUSTRATION SHOWING CONTEXT AS THE FOUNDATION AND CONTENT AS THE POINT

It's one thing to identify the archetypal ideas that unite the brand and its customers' aspirations for self-actualization. It's another thing to weave them into a mythology that can be related in a story compelling to the customer. Remember, the realm of the archetype is the unconscious. Our model has us dipping into this well to find the secret elixir that taps the emotional response in the limbic system. We still need to express a conscious communication that will elicit that emotional response, and we still need to provide the right logic so that the emotional response can be rationalized. This is the role of context and content.

Exploring the *Context*

SUGGESTED VISUAL: PHOTOGRAPH OF FAMILY AT KITCHEN TABLE. FAMILY MEMBERS ARE SCREENED BACK, THE REST OF THE KITCHEN IS CRYSTAL CLEAR

Understanding the brand/customer relationship is the foundation for determining what rational and/or emotional stimuli will engender the desired emotional reaction. Partly, context helps us confirm that the brand's assumptions are in alignment with its customer's assumptions. Do the dynamics of the marketplace look the same to the brand as they do to the customer? Do they agree on the brand's competitive set? Does the brand understand the mindset of the customer at the point of purchase and in general? Does the brand understand its barriers to growth or its opportunities for partnerships? Answers to these questions and more make up the context for the brand communications. This serves as the "back-story" for your brand mythology. The next job is to craft the content of the brand communication.

Crafting the *Content*

SUGGESTED VISUAL: A CARTOON WORD BUBBLE WITH THE WORD “COOL” IN IT.

In it's simplest form, content is a synthesis of what you want to tell your customers about your product or service and what your customers think is *cool* about your product or service. A key is to communicate just enough to push the emotional button and provide rationalization for the reaction. If this happens as quickly as a headline and picture, stop there. There is no profit for a brand to glaze over its customers' cerebral cortex with a long rational discourse over the benefits of its offering. As Renee Zellweger said to Tom Cruise in the movie *Jerry Maguire*, “You had me at hello.” Of course, it's not just what you say, but how you say it. That's where the chemical reaction happens after a good creative team is provided with an especially insightful message strategy.

The Message Strategy

STRATEGY DOCUMENT

Using the answers to the following statements as input, design your communications around the brand mythology that best connects with the brand's customer.

- The goals and wishes of the customer are:
- This is what's stopping them from reaching their goals:
- The goals and wishes of the brand are:
- This is what's stopping the brand from getting there:
- The brand has this to say about itself:
- This is what the customer might think is *cool* about the brand:
- This is what the brand strives to become:
- This is why the brand is here:
- This is how the brand will achieve its purpose:
- This is how the brand treats its customer:
- These are the predominant traits of the brand that its customers admire:
- The gift the brand provides its customer is:
- The one thing the brand delivers better than any other brand on the earth is:
- The one thing the brand is most passionate about is:
- Evaluation of the above information leads to the following archetypal ideas (list archetype(s) and corresponding values and traits):

APPENDIX C

THE MODEL TOOLS (POTENTIALLY THE COMPONENTS OF CLIENT AND CUSTOMER CREATIVE WORKSHOPS)

APPENDIX C

Brand/Customer Engagement Tools

In as much as our model represents a new way of thinking about building brands, it only follows that there should be new ways of thinking about the input we gather for developing a strong brand strategy. The toolset that follows contains some traditional and nontraditional questions that will ultimately help uncover much of the conventional marketing information an organization uses to develop its brand strategy—the part designed to reach the cerebral cortex. However, as we know, a purely logical message is a message without soul, and without the emotional connector every brand needs to nurture an enduring customer relationship. So, we have also included tools to help tap into archetypes and a customer's sense of self-actualization as a shortcut for the brand tapping into the emotion that resides in the limbic system. Input from these questions is richest when an organization can engage its current and potential customers to help provide the answers. However, even when just brainstorming answers for these questions within the organization, you might find a new path illuminated to the emotional connections between your customer and your own brand's self-actualization.

How to use these tools

Divergent and convergent phases

When using these tools, you will be asked to generate as many answers as you can for each question asked. Follow the rules of idea generation as you brainstorm your answers:

- *Defer Judgment.* Nothing kills an idea faster than to insult it or dismiss it.
- *Build on Ideas.* Let one idea lead to another...and another...and another. This is a good thing!
- *Seek Quantity.* Which would you rather have: three darts to hit the bull's-eye or 50 darts? The more darts, the better your chances.
- *Seek Wild Ideas.* It's easier to tame a wild idea than it is to spice up a tame one. Wild ideas often lead to the new thinking.

You will also be asked to prioritize your best answers. Use the rules for choosing answers when you are prioritizing:

- *Judge affirmatively.* Look for possibilities. Look for inspiration. Look for energy.
- *Be deliberate.* Take your time. This is where much of the new thinking takes place.
- *Check objectives.* Always keep in mind what purpose these ideas are serving.
- *Revise and improve.* What other ideas come to mind? How do you think differently about your challenge now that you've reviewed the ideas?
- *Consider novelty.* Don't be afraid of the idea that's never been done before.

Complete the exercises using the tools in Part I before proceeding to PART II.

PART I

Define your customer(s)

I shot an arrow in the air, it fell to earth, I know not where. This poem by Henry Wadsworth Longfellow is a perfect allegory for marketers who write about themselves without considering their customers. Most marketers might be surprised by how much they already know about their customers—demographically, geographically, even psychographically. They also might be surprised how much they don't know. And taking it one step further, they might be surprised how easily they can get some of the information they lack once they put their minds to finding that information. Finally, there is often surprise at how much effort marketers put into reaching lower-priority clients.

WORKSHEET:

- List everything you know about your customer.
- Now, what don't you know about them that you would like to know?
 - What might be all the ways you could get this information?
- If you have multiple targets, prioritize them.

What's the context of your message?

In traditional marketing terms, this might be called the situation analysis. Often, situation analyses can be quite daunting. It's more of a state-of-the-world kind of study. Thinking about this as context for your message might help you focus on what's important to your customer and your brand. The worksheet contains questions to help you get started. You're sure to develop others as you think about your customers and what is going on in their lives. A VERY IMPORTANT NOTE: This is where observational research can be incredibly helpful. Go watch your customer at the point of purchase or point of consumption or at some other venue where she/he hangs out. What's happening around them? What rituals can you identify with the purchase or consumption of the product/service? What materials are important at those moments?

WORKSHEET:

- Why do you think your product/service is needed?
- What are others doing who might compete or partner with you?
- Who or what might help you grow your business?
- What's getting in the way of growing your business?
- What is the mindset of your target(s) when they consider purchasing your product/service?

What's the content of your message?

This is your chance to say everything you've ever wanted to say about your brand. It's not necessarily everything that will end up in your marketing messages. The benefit of getting out all the potential content about your brand/product is that you can then pick and choose the content that has the most emotional impact or best rationalizes the emotional impact for your customers.

WORKSHEET:

- What would you like to tell others about your product/service?
- Which aspects of your product/service will your target think is cool?
- What do you think is the main benefit of your product or service?

Brand Vision, Purpose, Mission and Values

This is a valuable exercise for any brand. To do a deep think about what defines a brand from such a lofty perspective is a great tool for helping identify the role a brand can take in its customers' quest for self-actualization. Further, it helps define the traits and values that begin to define the archetypal ideas a brand can leverage in its marketing efforts.

WORKSHEET:

- What is the *vision* of your brand? (Who do you strive to become?)
- What is the *purpose* of your brand? (Why are you here?)
- What is the *mission* of your brand? (How will you achieve your purpose?)
- What are the *values* of your brand? (How do you work with others?)

Marketing Tactics

A deliberate review of your marketing tactics can help you evolve your plan each year rather than remaining static or feeling the need to reinvent the wheel every time you enter your planning season. As you develop new insights about your customers and your brand, recognize that they may change more than just your message. Use these questions to see how new insights might change your thinking regarding tactics, as well.

WORKSHEET:

- List the tactics you tried and want to keep as are.
- List the tactics you tried and want to improve.
- List the tactics you tried and you don't think will ever work.
- Are there any other new tactics you would like to consider?

PART 2

Organization Laddering Exercise

Ladder #1: *It would be great if...*

Complete the statement above with as many ideas as possible from your brand's perspective and you've just unleashed one of the most powerful branding tools you have. In its simplest form, you'll uncover your immediate goals for your brand and key strategies for achieving those goals. As you ladder up your responses by asking *Why would that be great?* you not only identify your immediate goals, but you begin to uncover your brand's path to self-actualization. And you see what archetypal ideals you want to embrace.

WORKSHEET:

From the perspective of your organization, complete the following phrase as it relates to your product and service:

It would be great if...

Continue to complete that phrase by asking *What else would be great?* to generate as many wishes as you think your organization might have.

Now choose 3 of your organization's most compelling wishes using the following criteria:

Which wish do you most want with your *head*, with your *heart* and with your *gut*.

Once you've identified those, ask *why would that be great?* still from your organization's perspective. Put your answer down in the form of another *it would be great if...* statement.

Example: *It would be great if we had a ready proposal format.* Why would that be great?

Because then we could respond more quickly and easily to RFP's. Okay, *It would be great if we could respond more quickly and easily to RFP's.*

Ladder #2: *What's stopping you?*

By asking *What's stopping you?* from achieving your brand's *It would be great if...* goals, you reveal a cornucopia of valuable data. First, you gain an understanding of the issues and problems that may be barriers to your success. Then when you rephrase the problems as questions to be answered, you can focus your efforts on the critical path toward achieving brand self-actualization. Furthermore, you'll have an opportunity to determine those issues that are common with or have the most effect on your customers and use them to help develop specific strategies, initiative and tactics.

WORKSHEET:

Chose from the 3 to 5 most compelling wishes that came from the *it would be great if...* exercise (consider the ones you chose with *head, heart* and *gut*) and pose the question to your organization, *What's stopping you?* Answer from your organization's perspective and turn that answer into a *How to* question.

Example: *It would be great if we had a ready proposal format.* What's stopping you? *We have no central file for our current proposals.* Okay, *How to create a central file for our current proposals?*

Still from your organization's perspective ask, *Why is that stopping you?* And, *What else is stopping you?* Continue this until you have uncovered all the barriers you can for your organization achieving its wish.

Customer Laddering Exercise

Ladder #1: *It would be great if...*

What are your customers' grandest dreams? Wouldn't it be great if you could play a role in helping them achieve those dreams? In helping them self-actualize? Even being aware of, acknowledging and supporting their dreams might be the basis for a strong emotional connection with customers. It's human nature to display loyalty to those who are loyal to you. And if our goal is to have our customers be brand ambassadors, shouldn't we do what we can to be ambassadors for them?

WORKSHEET

From the perspective of your customer, complete the following phrase as it relates to your product and service:

It would be great if...

Continue to complete that phrase by asking *What else would be great?* to generate as many wishes as you think your customer might have.

Now choose 3 of your customers' most compelling wishes using the following criteria: Which wish do they want with their *head*, which one with their *heart* and which one with their *gut*.

Once you've identified those, ask *why would that be great?* still from your customers' perspective. Put your answer down in the form of another *it would be great if...* statement.

Example: *It would be great if I had whiter teeth.* Why would that be great? *Because then I would feel better about my smile.* Okay, *It would be great if I would feel better about my smile.*

Ladder #2: *What's stopping you?*

How can you help your customers achieve their dreams? Look at all the factors that are stopping them from their dreams and see if you might be able to help them overcome some of them. Try applying the insights garnered from this exploration to your tactical plan, using events, public relations, promotions, etc. to become an advocate for your customer's dreams.

WORKSHEET

Chose from the 3 to 5 most compelling wishes that came from the *it would be great if...* exercise (consider the ones you chose with *head, heart* and *gut*) and pose the question to your customer, *What's stopping you?* Answer from your customers' perspective and turn that answer into a *How to* question.

Example: *It would be great if I had whiter teeth.* What's stopping you? *I drink too much coffee.*

Okay, *How to cut down on my coffee?* Or *How to protect my teeth from coffee stains?*

Still from your customers' perspective ask, *Why is that stopping you?* And, *What else is stopping you?* Continue this until you have uncovered all the barriers you can for your customers achieving their wish.

The Gift

While many marketing strategies do their best to determine the benefit of a brand or product, often it is a *rational* benefit that is offered. (You have probably uncovered this in the exercise on *Content*.) Finding *The Gift* your brand provides your customers is an exercise in mining the primary *emotional* benefit(s) of your brand. It can be fruitful input for helping you determine what archetypal ideas your brand might represent.

WORKSHEET

If your brand were giving a gift to your customer, what would that gift be?

Your Focus

Jim Collins, in his best selling book, *Good to Great (what year?)*, describes a habit of successful companies he calls the “Hedgehog Concept.” It includes a wonderful method for simplifying the focus of an organization. Two of the three dimensions he describes as forming the focus of an organization’s strategies, not surprisingly, are also valuable dimensions for understanding the potential point of emotional impact for a brand. They are: *What you can be the best in the world at* and *What you are deeply passionate about*. These dimensions reflect what a high sense of self-actualization looks like, so they are certainly appropriate questions for us to answer.

WORKSHEET

1. What’s the one thing you (strive to) do better than any other brand on the planet?
2. What part of your brand are you most deeply passionate about?

TOOLS STILL IN DEVELOPMENT

- **Values and Traits Inventory and Grid**
- **Guidelines for Observational Research**
- **Group Dynamic Exercise—Forming, Storming, Norming, Performing**

APPENDIX D

SHORT POWERPOINT PRESENTATION HIGHLIGHTING THE ESSENCE OF THE MODEL, CODE AND TOOLS

APPENDIX E

CONCEPT PAPER