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INTRO
EXCITING SHIFTS

Exciting shifts are happening in the world of marketing:

- **from Product to Experiences**
- **from Pitches to Conversations**
- **from Consumers to Participants**
- **from Spots to Stories**
UNDERSTANDING SOCIAL

social brands are about relationships
THE SOCIAL BUTTERFLY
A framework to rethink brands
THINK INSIDE-OUT
Build from the inside out. Go from employees to customers.

Know who you are and adorn yourself accordingly.

Line things up. When all the parts of the brand are aligned, the heart beats louder.
BUILDING BOTTOM UP

Branding

Products
Events
Sponsors
Partners
Customer
Donors
Employees
BE HUMAN CENTERED
Listen actively. Get to know your customers intimately.

Recover gracefully. One misstep doesn’t mean it’s over.

Focus on relationships and needs. This is where true value resides.
**DESIGN THINKING**

**two kinds of thinking actions:**

**CONVERGENT**
- refining
- reducing options
- making decisions
- applying constraints
- eliminating variables

**DIVERGENT**
- generative
- explorative
- expanding options
- creating new alternatives
- challenging assumptions
“BIG FIVE” DIMENSIONS

Brand personality can be characterized along these axes

**Sincerity**
- Down to earth
- Family
- Oriented
- Small Town
- Honest
- Sincere
- Real
- Wholesome
- Original
- Cheerful
- Sentimental
- Friendly

**Excitement**
- Exciting
- Trendy
- Daring
- Spirited
- Cool
- Young
- Imaginative
- Unique
- Up to date
- Independent
- Contemporary

**Competence**
- Reliable
- Hard Working
- Secure
- Intelligent
- Technical
- Corporate
- Successful
- Leader
- Confident

**Ruggedness**
- Outdoorsy
- Masculine
- Western
- Tough
- Rugged

**Sophistication**
- Upper class
- Glamorous
- Good looking
- Charming
- Feminine
- Smooth

Source: Aaker (1999, JMR)
“BIG FIVE” DIMENSIONS

Two alternate axes in Spain and Japan

BRAND PERSONALITY

Sincerity  Excitement

Passion  Competence

Peacefulness

BRAND PERSONALITY

Sincerity  Excitement

Competence  Sophistication

Peacefulness

Spain

Japan
SPARK PARTICIPATION
**Invite participation.** Open up and design for co-creation.

**Live in beta.** Create just enough so that others may still add to it.

**Be nimble.** You can have a focused goal but consider how you will adapt as conditions change.
TYPOLOGY OF CO-CREATION

CREATION PLATFORMS
Kickstarter, Quirky, Threadless

COMMUNITY ACTIVITIES
Harley Posse Rides

SOCIAL GOOD CAMPAIGNS
Pepsi Refresh project

PARTICIPATORY MOMENTS
Target flash mob, Apple retail

CONTESTS & VOTING
Ikea giveaway, Vitamin Water

SHARABLES
Coca-Cola
INSPIRE STORIES
Create never-ending stories that build value as they grow

Provide the raw material that enables clever storytelling

Inspire story sharing among both employees and customers
A FRAMEWORK FOR STORYTELLING

STORY

Situation
Desire

Complication
Obstacle

Solution
Outcome

Set up your story. Who? What? Where?
Establish dramatic question.

Core action happens here. This is what your story’s about.
Stakes, conflict and tension should be escalating.

Resolve the dramatic question. Show the consequences of the story.
COMPONENTS OF A STORY

characters
Great stories get the audience emotionally invested in the characters.

plot
Good plots keep the audience engaged and wondering what will happen next.

story arc
Good stories have a beginning, middle and end.
EMPATHY BOARD

Saturate a space with your empathy work such as user quotes, inspiration & more to uncover insights.
WHAT

Very few companies have a brand whose look, tone and sensibility is consistent across its touchpoints (e.g., its websites, customer interactions, packaging, advertising, etc.). This consistency is often missing because there is no attempt made to pinpoint and communicate the feel and rationale behind the brand’s name, logo, slogan, personality and visual style. If such a document does exist, it often fails, either because it’s a phonebook full of rules about what colors and fonts to use or because it’s only delivered to a handful of people in marketing and PR.

The perfect voice guideline is like a Facebook profile: In one page, it defines a brand’s personality (logo, slogan, verbal/visual style) while communicating its ideals, dreams, and relationships. This is a document that helps communicate your culture (your brand), and not what you might send to a creative agency so that they can create consistent collateral (your branding).

HOW

Design a Brand Voice Guideline to embody the personality you think your brand should convey. Use learnings from the Image-Identity Gap or your Empathy Research to help you define what should be the voice guideline for your brand. Give a codified voice to the best traits you’ve seen in your brand and fill in any significant gaps you’ve found in your brand’s current tone or personality.

Include any factors or traits that define your brand, while being as succinct and creative as possible. Here are a few such factors that your guidelines might include:

NAME / NICKNAMES. What is it called? How do its customers, employees, and suppliers refer to it?
PERSONALITY. What are your brand’s core values? What is your brand passionate about? What is it striving for? What does it find fascinating? What books are on its coffee table? What are its guilty pleasures? Who are its friends? If it were at a 7th birthday party, would it talk to the parents or the kids? If you surveyed its brand attributes, where would it be positioned?
SLOGAN. What is its catch phrase? What words should it be remembered by?
VISUAL STYLE. How does it look? If it were a movie, what movie would it be? If it were a magazine, who would be its competitors? Does it wear a sweatsuit or a necktie? Does it shop at J. Crew or Juicy Couture? Does it fit in more at Walmart or farmer’s markets?
VERBAL STYLE. What language and tone does your brand use? Does it use contractions or slang? What kind of jokes can it tell? Does it whisper or shout? Is it smiling or smirking or stifling a yawn? Does it pronounce either as Ee-ther or Eye-ther?
To nurture and sustain a brand effectively, you must be constantly in touch with what your stakeholders (consumers, users, members) think about your brand and what you (your organization) thinks of your brand. It helps to have some language to pull these constructs apart. **Brand image** is defined as the set of actual associations the consumer has with a brand; **Brand identity** is defined as the set of aspirational associations the organization would like to have of its brand. Perform a preliminary image-identity gap analysis by capturing the brand associations from these two perspectives (internal + external).

**WHAT**

**HOW**

**Step 1** : Choose a brand or an organization you want to study. You may do this analysis for your group brand, but it might also be useful to use this opportunity to do analysis on a competitor. We also recommend you finding a partner to do field work with - of course, complete your assignments separately.

**Step 2** : Dive in. Get out there. Go talk to a minimum of 5 ‘internal’ individuals and 5 ‘external’ individuals. Aim for a minimum of a 5 minute conversation with each. You will learn a lot from them and their perceptions and experiences with a brand. At some point, as them : “What five words come to mind when you think of [name of brand]? Probe deeper and ask why if you see or hear inconsistencies i.e. “You first said ‘convenience’, but then you grimaced when you said ‘timing’. Why?”

**Step 3** : Visualize and summarize your learnings. Briefly address the topic, your process, and your findings. Come up with one recommendation for management that would help diminish the gap.
In order to create a compelling experience for your brand, you’ll need to harness your creative energies around a single focused goal. You’ve spent the past few days immersing yourself in your brand and its customers – what are some pain points you might address? inconsistencies you might resolve?

The Single Focused Goal will be both the impetus behind the social experience you build as well as the lens through which your impact will be measured. Use all the insights you’ve developed over the past few days and think about how you might create impact for your brand.

Some helpful questions to ask yourself while coming up with your goal:

**WHAT ACTIONS DOES IT INSPIRE?** A good goal lends itself to specific, concrete actions. Your team should know exactly what it needs to do to achieve your goal and not have to spend time parsing through fluff.

**HOW DOES IT AFFECT REAL PEOPLE?** The best goals take human interactions into account. At the end of the day, your goal is more than just numbers and spreadsheets – your team should spend some time considering the qualitative impact of your goal and how this might be measured or recorded.

**HOW WILL YOU MEASURE IT?** A well-designed goal is both measurable, testable and clear. Your team (and the teaching team) should know exactly what your goal means, and what metrics you’ll be using to determine how effective your social experience is at achieving your goal.

**DOES IT MAKE YOU HAPPY?** You’ll know your goal is awesome if the thought of achieving it makes your team happy and excited to be working towards it. It’s tough to fake passion and the intense drive and motivation that comes from it, so choose a goal that your team will be proud to be working towards over the course of the quarter.
PERSONAS AND JOURNEY MAPS

(from: Maria Guidice
HOT Studio)
“Know, first, who you are, and then adorn yourself accordingly.”

— Epictetus, Greek Philosopher