

IMC Journal of Integrated Communications

NEW IDEAS AND BEST PRACTICES IN MARKETING COMMUNICATIONS

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A Brand Designed by Core Customers

BRENDAN KIERNAN AND ANDREW DAVISON

How can a company engage consumers in a credible, authentic way that makes the brand a natural part of consumers' identities? In a case study of a multi-channel marketing campaign for the Marmot outdoor goods line, Brendan Kiernan and Andrew Davison say the secret was to dig deep for customer insight by involving core consumers throughout the campaign design process.

Wellfild Mountain Film Festival Wellfild, Colorado: May 31, 2003

The sold-out theatre is packed with hundreds of outdoor enthusiasts. The main attraction is a 34-minute documentary film, "Last Horizon: The First Ascent of Sepu Kangri." Word about the film had been making the rounds at the film festival for the past two days and the energy of the audience is palpable. As the film ends, sounds of Tibetan flutes play eerily as the camera pans back from a close-up of a monk illuminated by the late afternoon sun high in the Himalayas. The audience sits stunned for a moment before loud and lasting applause erupts. After the show, people eagerly grab free copies of an enhanced DVD version of the movie, stickers and limited edition Climb Sepu t-shirts. Some of the comments by audience members leaving the theatre include: "best climbing film ever," "so real," "they really told it like it is," "refreshing" and "gritty and authentic."

The above described scene sounds like a successful adventure film premiere. But in reality, the film "premiere" was just one iteration of a highly successful ongoing brand campaign for Marmot Mountain Ltd., a leading speciality outdoor apparel and accessories manufacturer and W.L. Gore & Associates, Inc., the makers of Gore-Tex fabric. The film was part of an experiential brand campaign that chronicled the testing, development and use of Marmot products through outdoor experiences.

The brand campaign itself had been conceived nearly two years earlier with a simple concept: understand consumers as people first, build a story around the types of experiences that matter to them, and distribute the narrative through communication channels that support their ability to engage with the campaign and share their experience with others.

The Challenge

Marmot was facing increasing competition from emerging innovative brands that were successfully encroaching on Marmot's claim to the mantle of authenticity among core consumers. In response, Marmot execut-

ed an integrated cross-platform brand campaign communicating Marmot's dominant market position as an authentic outdoor brand. The campaign focused on gaining a deep understanding of the people that buy and sell Marmot products and designing a marketing communications approach that leveraged insights gained about how they spend their time and what they value as people. The goal was to engage them as people to influence their behavior as customers and consumers. The specific goals of the engagement were as follows:

- Better understand core consumers, especially in terms of defining the value exchange over time between the customer and their experience with the brand.
- Achieve brand engagement with core consumers to increase long-term retention and brand loyalty.
- Reinvigorate the brand to attract new consumers from within the core segment.

The Approach

The approach to the campaign was guided by the concept of experience design. Experience design proposes that the richest source for innovation comes from a deep and holistic understanding of people, and it encourages their direct involvement in the actual campaign design process. By using techniques such as focus groups, phone and online surveys and panels, traditional market research largely focuses on quantifying what people say about their experiences. Because actual behavior often varies considerably from opinion, experience design draws on methods from anthropology and sociology to focus more on what people do, think and feel. Understanding these areas is a powerful source of insight and innovation, for it is rooted directly in the human experience allowing researchers to gauge people's behavior and interaction with a brand in a minimally biased and contextual fashion.

We formed an integrated research-design team that worked collaboratively with the client to define, design and assess the campaign as it evolved. By training the design team in basic ethnographic research tech-

niques and including researchers in early design sessions, we hoped to better translate the insight gained about the consumers as people into effective marketing communications.

The approach involved three phases:

- Ethnographic research for in-depth understanding of target audiences for campaign definition and innovation.
- Campaign design and development of campaign attributes based on ethnographies.
- Ongoing assessment and measurement of campaign based on specific brand engagement metrics.

Developing a Customer Experience Model

The first step was to understand Marmot's current perception of their value chain, including technical fabric partners (specifically W.L. Gore & Associates), specialty retailers and core end-use consumers. The team focused on gathering existing information provided by the client. Based on a synthesis of this information, heuristic experience models were created for retailers and consumers that included key phases of their experience with Marmot and the necessary triggers to move from one phase to the next. The term heuristic experience model was used to describe customer lifecycle models created based on stakeholder opinion prior to validation through research.

For example, the initial phase for a consumer was hypothesized to be awareness. In order for a consumer to move from awareness to interest, the next phase in the model, the trigger was found to be resonance, i.e. the consumer needed to have an experience that made them believe that the values of the brand resonated with their own.

The heuristic models were used to create an initial framework for understanding the target audience as well as generating key goals for research. Key goals included better understanding the triggers along the model and developing a more in-depth understanding of the critical tasks or activities associated with each phase.

The next step was a rapid and focused ethnographic research phase. Ethnographic research focuses on using contextual research techniques to generate qualitative insight into the behavior, attitudes and interests of people. Ethnographic research was chosen as the research methodology because of the relatively small sample size required to generate insight into behavior relative to brand experience. Techniques that were used for the project included video self-journaling, contextual interviews, video shadowing and card sorting.

For video self-journaling, small digital video cameras were provided to Marmot-sponsored athletes, selected retail shop employees and core consumers for their use in documenting their daily lives, including any outdoor activities. The goal of this process was to better understand how these types of activities, and the products they use to support them, were integrated into the lifestyles of the target audience. What was found was

that people were constantly seeking out activities that they found meaningful or authentic and avoiding (and disparaging) anything deemed inauthentic or false. Authenticity was closely aligned to activities considered non-commercial, difficult to duplicate or transformational. Most people found an abundance of messaging undesirable and equated almost all advertising with something "unreal" or, in many cases, negative.

Similarly, in working through card sorting exercises in which people were asked to sort a range of activities in order of importance participatory activities ranked highest while activities like shopping or watching sports on TV were lowest. This insight helped confirm that one of the key challenges would be to engage a market segment that was both suspicious of brand promises and not likely to respond well to traditional media channels.

Contextual interviews—that is, interviews with target market consumers in their homes or while shopping for outdoor products—helped to determine that consumers rely on word of mouth, peer advice, and perceived non-biased expert opinions as the most trusted source of infor-

Experience design proposes that the richest source for innovation comes from a deep and holistic understanding of people, and it encourages their direct involvement in campaign design.

mation when making a purchase decision. Existing secondary research had found that the buying decisions of the over 90 percent of outdoor apparel consumers was strongly impacted by a small group of influencers comprised of retail shop owners and employees and ultra-core consumers, including certain athletes perceived as non-biased.

The ethnographic research validated this data and further provided insight that this influencer group, deemed brand authenticators, largely based their purchase and recommendation decisions on the perceived authenticity of the brand as determined by their own experiences with the product, input from peers and the product stories generated by their community. The product stories had the quality of urban myths—tales of how certain products withstood extreme weather conditions, animal attacks, baby vomit or years of abuse all told within the context of a particular personal or second-hand experience.

Through following someone through their daily activities with a video camera, consumers use products across a broad range of activities from taking a child to school to demanding outdoor environments. These behavioral characteristics affected not only the content of the campaign but also the distribution strategy as well. It was determined that the campaign strategy:

The story itself revolved around the attempt by a seven person expedition team to summit and ski Sepu Kangri - an unclimbed peak in eastern Tibet that has captured the imagination of explorers and mountaineers since the 19th century.

- Should avoid relying too heavily on traditional distribution channels.
- Should focus on developing authentic stories about people perceived as “real.”

Provide consumers multiple points of access to the story, across a broad spectrum of engagement points and over time.

Creating multiple points of access was necessary because of the widely differing levels of technology expertise and receptivity among people in the target market and the identified preference of one-to-one communications on their time and terms.

Specifically in relation to authenticity, the research indicated that consumers were hyper-sensitive to any media or messaging that they felt was coming from sources external to their perceived community. They had significant scepticism towards what they termed “mainstream media” incorporating outdoor or adventure experiences into packaged spectacles. This created significant challenges for the campaign design and development in creating a campaign that had impact and reach without appearing packaged.

People were much more receptive to product marketing when it occurred in the context of a friend or trusted advisor describing how they had actually used something rather than in a store-based context or a description of specific product features.

The final step was to use the insights from the research to refine the heuristic experience models initially created. For example, while the model itself did not change significantly, the findings in regards to technology expertise and receptivity did affect how the campaign was developed to improve the likelihood of moving consumers from awareness to interest. Specifically, in-store point-of-sale (POS) displays were modified to provide more detail about the expedition to further generate interest and to increase web traffic.

The final deliverable of this process was an actionable decision framework that guided the concept and design phases of the campaign development as well as served as the starting point for determining key measurements for campaign success. The decision framework was a synthesis of the research findings that set out key messaging and delivery strategies as well as articulating creative concepts.

The decision framework created the parameters to assemble the campaign, with a focus on what were deemed high priority channels (website and tradeshow) and key messaging concepts (focus on people having experiences, keep products in the context of their actual use, don't use hyperbole or gratuitous references to the “extreme”, etc.).

Campaign Design and Development

Initial campaign brainstorming focused on leveraging Marmot's existing athlete sponsorship program to create an ongoing story to document the unfiltered adventures of Marmot's sponsored athletes and design board members using and testing Marmot products and prototypes in the field. At this point, delivery platforms for telling this story were discussed as well and included ideas ranging from the web to print advertising to production of a documentary film.

Throughout the creative development process, the decision framework was referenced as a benchmark for evaluating ideas and refining direction. The outcome of the process was the choice of a lightweight expedition to climb and ski an unclimbed peak in eastern Tibet. The peak, Sepu Kangri, had been attempted twice previously without success, but did not present extraordinary challenges from a technical mountaineering perspective. Based on the importance of stories feeling “real” we determined that a team composed of both professional Marmot athletes and core consumers would resonate the best with the intended audience.

The ability to show contextual product usage, avoid the pitfalls of over-dramatization and strike a balance between an “exotic” and “doable” objective were key factors that led to this choice. The expedition opportunity also coincided well with campaign timelines and resources. The idea was to follow the story from beginning to end—the preparation, journey, climb and return—with a focus on the people and their experiences. Products were to be leveraged as they related to use during the trip and as giveaway incentives for engaging consumers in the experience. Additionally, the importance of authentic testing of prototypes was seen as both an integral narrative element of the story of the expedition and a key messaging theme for Marmot.

Once the foundational elements of the campaign were established, the team involved several consumers in early prototyping and participatory design exercises such as using markers and sticky notes to establish key story elements and sections of the website. The goal of this early design work was to align distribution channels and campaign look and feel with the real-world activity (the climb itself) and what was learned about the target audiences through the ethnography and the customer experience modeling.

Important to the success of the campaign, the intended audience was continually involved in the formation and launch of the various elements of the campaign such as print advertising, CD-ROM trail-

er and POS displays. This was accomplished through ongoing participatory design workshops during which ideas were tested and refined using low-fidelity paper prototypes and evaluated through usability testing where appropriate for interactive channels. Examples included the involvement of shop employees from the local branch of a major national retailer in refining the navigation model for the website, specifically in balancing the narrative aspects of the story with the functional aspects of the campaign such as the opt-in email campaign and giveaway.



Card-sorting sessions (left) allowed customers to sort out their attitudes and associations toward the Marmot brand. The still on the right is taken from the film “Last Horizon: The First Ascent of Sepu Kangri,” the most ambitious aspect of a successful brand campaign for Marmot.

The campaign itself became a multi-channel communications approach with a web-based episodic story at its nexus. The web was chosen as the central aspect of the story to facilitate peer-to-peer communication, maximum reach and the ability to evolve the story over time and through different media including video, animation and photos.

The goal of the campaign was to drive traffic back through the website through the narrative story of the expedition to the parallel story of Marmot’s in-the-field product testing—a major factor in authenticity according to our research. The website served as a data gathering and community hub via discussion boards, an email newsletter and product giveaway registrations and provided an ongoing means of delivering the story episodically, maintain interest, and support the customer relationship over time. The website would also prove instrumental in tracking the success of the campaign and refining the approach for future iterations.

Currently, the Climb Sepu campaign, broadly defined as all the elements that engage the target audience and prompt them to go to the website, has spanned at least 13 different platforms or channels. These distribution channels include: a CD-ROM tradeshow promotion, tradeshow imagery, media displays, an industry event, a promotional DVD, numerous high profile film festival showings, retail POS displays, in-store media, in-store events, television commercials, sales and marketing collateral, print advertising, grassroots event promotions and scheduled for Fall 2003, a one-hour National Geographic television segment.

Several of the channels, such as the industry events, tradeshow displays and CD-ROM were specific to the retail shop employees and owners. Other channels, including the retail POS, in-store media, print advertising and in-store events were directed primarily at the

core end consumer. However, we noticed a significant degree of crossover even with unexpected channels. For instance, many of the CD-ROM distributed at the Outdoor Retailer tradeshow, the industry’s key semi-annual event, would later turn up in the hands of core consumers and serve as impetus both for website visitors and film festival attendees.

The distribution channels were integrated through a systemic design approach that provided the flexibility necessary to create compelling communications using unique channels while maintaining overall continuity. In order to maintain continuity the campaign distribution strategy matched anticipated channels for various audiences based on research insights.

For example, the use of a CD-ROM as a tradeshow giveaway was the direct result of our research into the “nomadic” but relative technology sophistication of most shop employees. A single logo, a stylized interpretation of the Tibetan symbol for mountain, was used across the entire campaign as was the tagline “No Guarantees.” “No Guarantees” was an element of continuity brought through from a 2001 pilot project to test the approach used in the Climb Sepu campaign.

The success of the tagline in limited testing with the target market and the main reason it was carried forward into the larger campaign was it resonated with the realities of core consumer experiences: in these environments there are no guarantees. The perceived honesty of the statement, especially in the context of such dangerous activities as mountaineering, worked well with the target market.

The story itself revolved around the attempt by a seven person expedition team to summit and ski Sepu Kangri—an unclimbed peak in eastern Tibet that has captured the imagination of explorers and mountaineers since the 19th century. Leading the expedition was

Mark Newcomb, an accomplished ski mountaineer, guide and Marmot design board athlete.

Also on the expedition were Mark's wife, Carina Ostberg, and Ace Kvale, a renowned outdoor photographer. The expedition also featured Carlos Buhler, one of America's foremost Himalayan mountaineers whose accomplishments included climbing a new route on Everest and a new route on K2, the world's second highest mountain, considered by many to be the most challenging high altitude peak in the world.

Kate Clayton, Jordan Campbell and Frank Pickell, all recreational mountaineers who were part of the media, film and photo teams, were included in the expedition as well. The inclusion of mountaineering legends like Buhler alongside relative novices like Clayton and Pickell was planned to align with the target audiences.

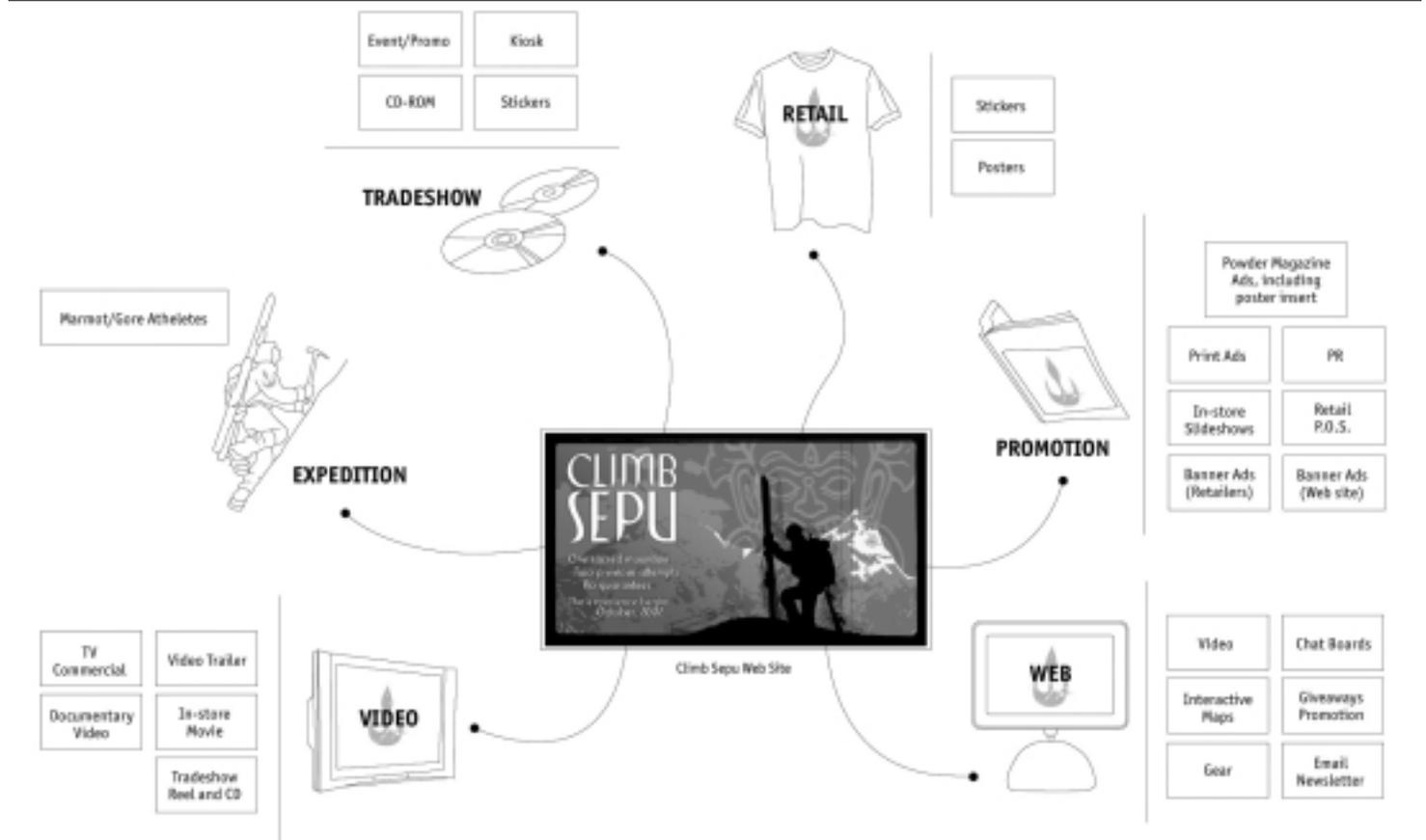
Marmot products were never highlighted as products themselves,

but always as part of the context of the experience. For example, all expedition team members wore Marmot products and the Marmot logo is evident in many of the shots from the film, website and photos, but there is no overt mention of Marmot products by any of the team members.

Prototype testing, however, remained a prominent theme throughout the narrative, including pre-expedition testing, on-expedition journals and post-expedition through an interactive gear section of the website. Still, even the gear testing section of the website was designed to highlight the experience. Products are illustrated from actual expedition photographs that show various team members using gear while climbing or sitting in a tent, never in isolation.

The campaign also brought Marmot together with key industry partners: W.L. Gore & Associates (Gore-Tex), and *Powder* magazine. As one of the largest technical fabric companies in the world, Gore-

Channel Map for the Climb Sepu Campaign



Marmot's *Climb Sepu* campaign revolved around a Web-based episodic story, but spread into many other channels. Campaign materials were targeted at both retail and consumer audiences.

Tex provided significant funding to the campaign through matching marketing dollars. *Powder* magazine served as key media distribution partners well-positioned to reach the brand authenticators based on their market positions as a leading publication for climbing and skiing.

Assessing the Effectiveness of the Campaign

The campaign, in terms of content and distribution strategy, charted new territory for Marmot. In order to measure success, traditional marketing metrics were combined to derive a sense of brand engagement—the overall effectiveness of the campaign to attract and retain the attention of the target audience over time. This metric was created using a weighted analysis of common measurements such as website traffic statistics, opt-in email addresses, print and television advertisement impressions and time spent on other messaging channels such as CD-ROM, film, tradeshow displays, POS and grassroots efforts like events, apparel and stickers. The goal was to take these brand engagement metrics and tie them to specific measurable business outcomes such as product sales, customer loyalty or increased revenue per customer.

For Marmot, with this ongoing campaign, key measurements included the overall website traffic to the Climb Sepu site (several hundred thousand unique visitors), time per session (over nine minutes on average) and referral traffic from the site to Marmot's corporate website (top referral site). Additional key factors included dealer touch points such as in-store displays (provided to over 200 Marmot retailers), in-store movies (provided to the top 50 Marmot retailers) and CD-ROM giveaways (over 4,000 with an estimate of 2.2 views per CD).

Aligning these metrics with the measurable business outcomes has proved somewhat challenging largely due to technology-related issues on the consumer side such as lack of ability to track visitors through the e-commerce site. On the dealer side, there is difficulty in translating dealer engagement in the campaign, which can clearly be described as very high, with tracking at the individual level the effects of this engagement on their recommendation of Marmot products to consumers.

Still, clearly the direct response to the campaign was significantly greater, with much longer-term interest, than any previous campaign initiated by Marmot. In addition, this engagement can be loosely correlated with overall positive trends in the business including increased sales. Additionally, based on industry benchmarks that were obtained, the traffic numbers and site visitation times were significantly above average. For instance, a similar-sized outdoor and athletic apparel and shoe manufacturer averages only 12,000 unique visitors per month with an average visitation time of less than two minutes yet this

organization still records over \$2 million in sales directly from their website. While Marmot does not offer direct e-commerce sales, given their higher visitation numbers and site visit time, it is possible to project significant direct sales dollars through the campaign itself.

Conclusion: Moving Towards a Customer-Centered Product Strategy

The campaign succeeded in two important ways. First, as a marketing communications effort as evidenced by the website traffic numbers and distribution penetration to the target market. Secondly and perhaps more importantly, the campaign also succeeded in creating an ongoing feedback loop from customer experience through marketing communications to product design back to customer experience.

The campaign become more than just a marketing effort but also a true customer brand experience initiative by leveraging the insight and actual campaign story to inform ongoing product branding and design. In the words of Marmot vice president of marketing Tom Fritz, "The Climb Sepu campaign has been enormously successful for Marmot in terms of generating brand awareness and closing the loop between our product design process and our marketing efforts."

Marmot products were never highlighted as products themselves, but always as part of the context of the experience.

Recent examples of this customer-centered design loop have included imagery from the campaign leveraged for consumer catalogs and dealer workbooks and the inclusion of the Sepu expedition tested "Willard Suit" into the 2004 product line. Additionally, the Climb Sepu logo has become part of Marmot's product design strategy as the inspiration and logo for a new clothing line. The company has even gone so far as to name one of the garments the "Frank t-shirt" after Frank Pickell of the expedition. These developments will now serve to inform the 2004-2005 iteration of the campaign as these new products become part of the next experience that will in turn serve to test future prototypes.

These most recent developments bring the campaign full circle from a campaign informed and driven by focusing on customer brand experience to a campaign that itself is now informing customer brand experience through the actual product. By closing this loop, the campaign has transcended the traditional firewalls between branding—long considered the domain of externally focused top-

down image and strategy, and product design—a discipline long focused inward through bottom-up research and development and very selective customer product testing. This is a primary goal of customer-centered, or experience, branding.

Marmot has shown an ongoing commitment to experience branding based on the success of the Climb Sepu campaign and will be pursuing similar efforts in 2004 and beyond. Depending on the resolution of channel conflict concerns, a potential next step would be the inclusion of direct e-commerce functionality through the campaign website. This would further close the loop as well as making direct return on investment and sales numbers transparent.

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