Massachusetts Nonprofit Network October 21, 2015 brand strategy consulting



## Why bother?



## No matter who you are, brand matters

- Communicate mission and strategy
- Stay focused
- Prioritize projects and programs
- Communicate effectively and efficiently
- Attract, hire, and retain
- Raise money
- Ride out a storm

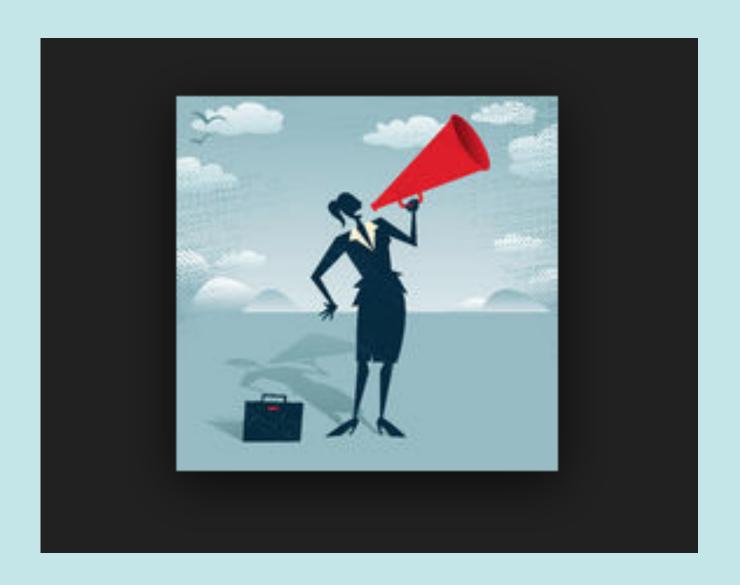
A strong brand
allows you to establish
first a connection,
then a relationship,
with those most important
to your success.

Delivering on a strong brand is about making a promise, and delivering on that promise.

Every stakeholder.

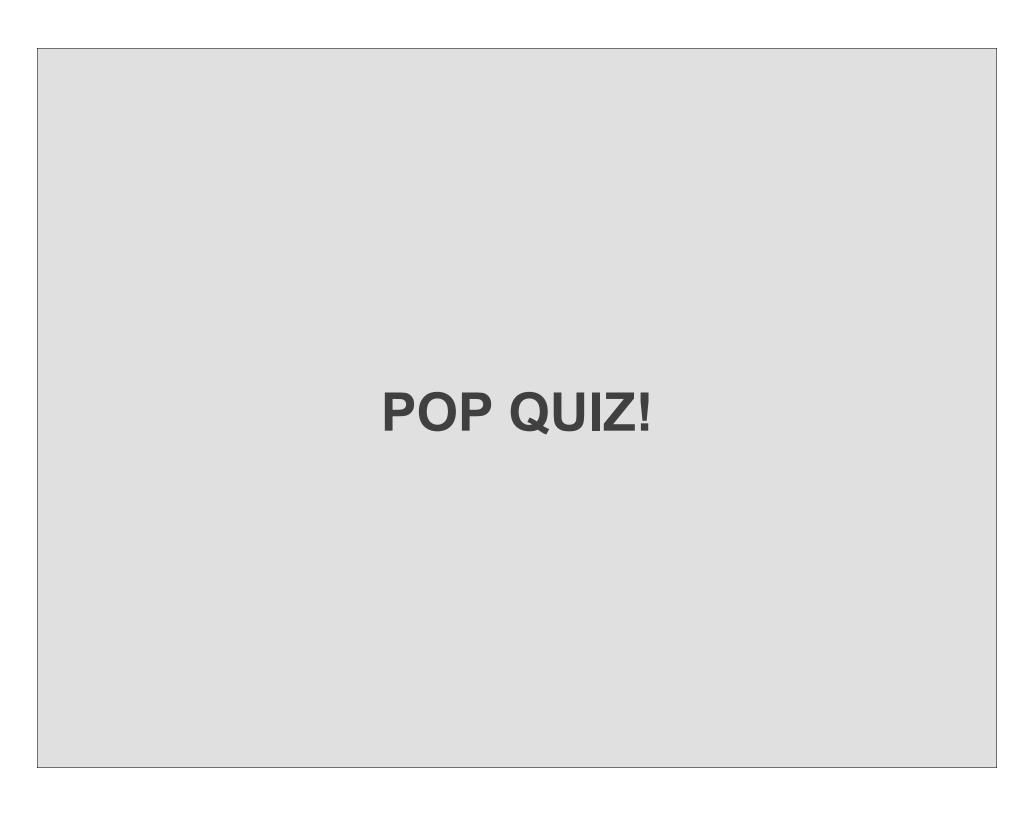
Every touch point.

Every time.



And you can't do it alone.

What does your brand PROMISE?

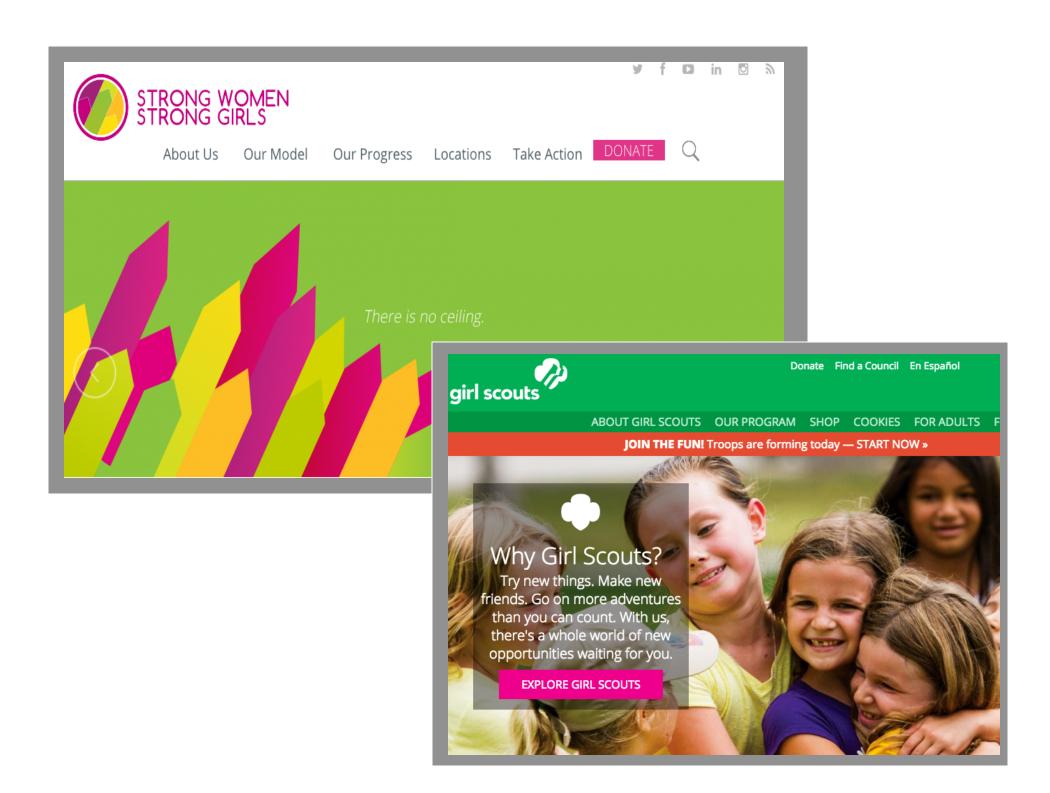












What does your brand PROMISE?

#### For example...

- Discover an extraordinary collection of resources to inspire you along new paths.
- Experience, in a very real and intimate way, the lives and stories of the individuals and families who have made New England what it is today.
- Make a world of difference in your own backyard.
- A place where young artists can be their very best selves.

## How do you define your brand promise?

- Know who you are...and what you can deliver
- Know your audience...and what they want from you
- Know your competition...and what they don't deliver

## Brand strategy methodology

Internal	External	Brand	Communications	Creative
Discovery	Discovery	Strategy	Plan	Development
Strategy session Individual interviews Focus groups Communications audit	PRIMARY Visitor interviews Member interviews Donor/funder interviews Partner interviews  SECONDARY Competitive audit Secondary literature review	Master brand messaging Product/service brand hierarchy Audience message matrix	Recommended communications strategies:  Brand maintenance  Awareness  Lead gen  Relationship management  Calendar  Budget  Measurement and evaluation	Visual identity Collateral Web site Advertising Signage Direct mail, etc.

#### Know who you are

- Develop (and instill!) a consistent elevator pitch
  - 30 second explanation of who you are and what you do
  - The answer to the question "What is (organization)?"
- Clear, concise and interesting
  - WHO you are, WHAT you do, for WHOM.
- Use your elevator pitch to win the right to tell more of your story (you don't need to tell the whole story in 30 seconds!)
  - Capture your listener's attention enough so that you can move into what makes you unique, how you do it, etc.
- Create (and maintain) a consistent set of proof points and supporting statistics

#### Know your audience

- Demographics and psychographics
  - Understand who they are, how they segment, how they view you, what they need/expect from you
  - Demographics: gender, age, income, marital status the dry facts
  - Psychographics: habits, hobbies, and values
- Just ask (or have someone do it for you)
  - Phone interviews/focus groups with a combination of long-term and newer members and volunteers
  - Conversations with partners, the press, other external stakeholders
- They can't ALL be your most important audiences.
  - Don't try to be all things to all people "following the funding" is one of the surest ways to muddle your brand
  - In the words of Dorothy...

## For example...

Audience	Description	Audience Key Concerns	Desired Perceptions/Behaviors	Our Messages to Them
Students	<ul> <li>Highly driven, well-rounded individuals</li> <li>The ideal student "customer" is a visitor, and is not necessarily an art majorbut they are willing to explore new things and new ways of thinking</li> </ul>	<ul> <li>Developing their ability to think more broadly</li> <li>Having an impact on their community</li> <li>Developing "real world" experiences</li> <li>Getting it all done</li> <li>Occasionally taking a break from getting it all done!</li> </ul>	<ul> <li>Understand the role/value of DMCC within the context of the College</li> <li>See DMCC as a valued resource across a variety of dimensions</li> <li>Use DMCC regularly</li> <li>Act as ambassadors for DMCC within their spheres of influence</li> </ul>	<ul> <li>ALL</li> <li>We are a valuable resource: unique opportunity to see real works of art in your own backyard.</li> <li>We help bring new perspectives to your studies, and to your hectic life.</li> <li>Easily accessible across a variety of channels</li> <li>Extremely supportive of experimentation and risk-taking</li> </ul>
Faculty and staff	<ul> <li>Passionate, dedicated individuals engaged in the broader college community</li> <li>Ideal faculty/staff "customer" is not limited to the art department</li> </ul>	<ul> <li>Finding opportunities to expose their students to real works of art and new ways of thinking</li> <li>Keeping their work and teaching relevant/fresh</li> <li>Occasionally taking a break themselves</li> </ul>	<ul> <li>Understand role and value of DMCC within the context of the College</li> <li>Have greater investment in/ ownership of DMCC</li> <li>See DMCC as a valued resource and collaborator</li> </ul>	<ul> <li>FACULTY AND LEADERSHIP</li> <li>Our collections, programs and staff can help enrich the academic experience, and help create better students.</li> <li>We share your high intellectual standards and can be a valuable partner in helping to differentiate the Wellesley College experience.</li> </ul>

#### Know your competition

- Who competes with you for financial resources, in-kind donations, volunteers, board members, media attention, etc.?
- Understand alternatives for your supporters' time, money, attention
- Evaluate brand messaging in 4-6 competitive or peer organizations
  - Learn from their brand best practices and mistakes
  - Identify any apparent norms and ensure a unique brand strategy
- Regularly visit competitors' web sites, attend their events, ask your supporters how they view the competition

#### For example...

#### Organization

The Children's Defense Fund is a child advocacy & research organization which lobbies on behalf of children at the federal & state level.

#### Mission

The CDF's Leave No Child Behind mission is to ensure every child a Healthy Start, a Head Start, a Fair Start, a Safe Start, and a Moral Start in life and successful passage to adulthood with the help of caring families and communities.

#### Brand Observations

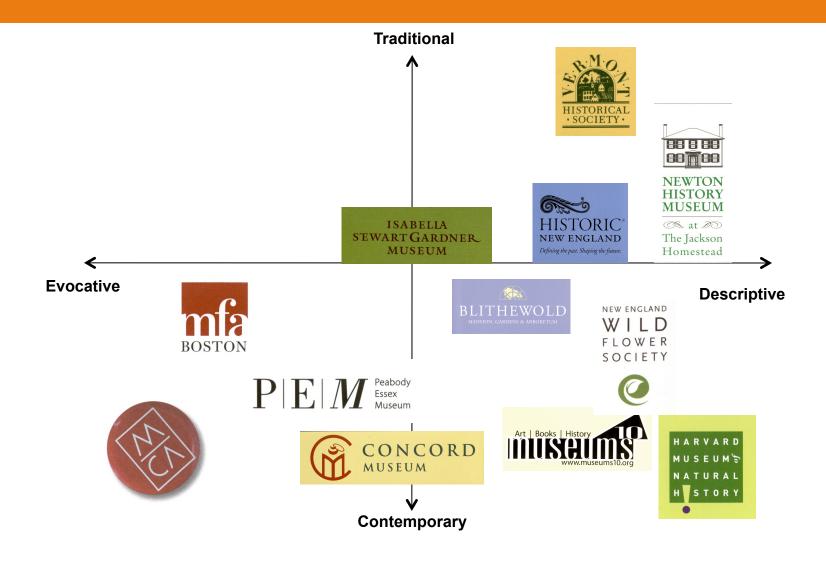
The CDF is a well-oiled advocacy machine dedicated to the well-being of the whole child—with special emphasis on those who are indigent, members of a minority group & disabled.

The entire site serves as an emotional plea for activism to anyone who cares about the welfare of America's children – to become informed, to get involved, to right the wrongs that children suffer today.

The presence of Marian Wright Edelman (founder & president) throughout gives credence to the CDF as carrying on the work of the civil rights movement out of which it was born.

Branding is minimal beyond the logo & tag line, which both stir emotion and rouse action.

## Mapping the visual brandscape



## Build a brand road map

- Context (why)
- Goals/Objectives
- Competitive landscape
- Audience insights
- Brand promise (internal rallying cry)
- Elevator pitch (external core message)
- Proof points (reason to believe that elevator pitch)
- Brand personality
- Message matrix (approved messages used as secondary points when talking with audience segments)
- Product brand platform
- Guidelines (what and how)

#### It's not just about the words and pictures

Branding is not only about how you look and sound, it is about how your organization behaves... what it feels like to be served by you or to help you and be thanked by you.

Brand is about how people experience your organization.

#### Engage staff and volunteers

- Start early
- Find your champions
- Connect the dots
- Make it easy to do it the right way
  - Measure and reward
  - Keep it coming from the top
  - Show you mean it
  - Pick your battles

#### Start early

- Involve them in the process
- Keep them in the loop
- Listen to the dissenters
- Overcommunicate
- Celebrate!
- Over the long term...include the brand in onboarding

#### Every brand needs a champion

- Has the vision and clout to make it really happen...and keep it happening
- Owns the brand and cares passionately about its successful development and maintenance
- Probably not at the most senior leadership level (although they have to clearly sponsor and support the effort)

#### Connect the dots



#### Make it easy to do it the right way

#### CONSISTENT

Relevant, consistent core messages
Visual brand identity (logo, fonts, color palette, imagery) that effectively and efficiently communicates the essence of your brand

#### **AMBASSADORS**

Clear brand behaviors
Integrated communications plan

#### Give them an elevator pitch they can use

The Learning Center for the Deaf is a nationally recognized leader in educational, therapeutic, and community services for deaf and hard of hearing children and adults.

## Your turn!

# Help them understand how the pieces fit together

We deliver a full spectrum of Educational Services to empower deaf and hard of hearing children of all ability levels to achieve their full potential.

Our continuum of
Therapeutic Services
provides highly
individualized care and
therapy to deaf and
hard of hearing
children and adults
facing social and
emotional challenges.

We offer a range of Community Services designed to empower, educate, and engage deaf, hard of hearing, and hearing people in the MetroWest area and beyond.

As a nationally known provider of services to the deaf community, we are committed to ongoing Research,
 Training and
 Advocacy to build awareness and support for deaf culture in the US and beyond.

- Marie Philip School
- Parent Infant Program
- Public School Partnerships
- Walden School

- Walden School
- Walden Community Services
- Community Audiology Clinic
- Community ASL Classes
- Community
   Interpreting Services
- Public School Partnerships

- Center for Research and Training
- Signing for Success

#### Help them understand their role

#### For instance, your board should be:

- Avid networkers in their spheres of influence
- Ambassadors telling their personal story
- Social media multipliers (like, share, comment)
- Stewardship of key donors
- Referral source of donors, volunteers and new board members

## YOU CAN MAKE A WORLD OF DIFFERENCE IN YOUR OWN BACKYARD

Foundation for MetroWest connects philanthropic opportunity with demonstrated need. We promote philanthropy in the region, help donors maximize the impact of their local giving, serve as a resource for local nonprofit organizations, and enhance the quality of life for all our citizens.



FOUND Foundation for MetroWest builds strong communities by:

#### PROMOTING LOCAL PHILANTHROPY

Philanthropy Marketing Education Advocacy Events

#### CONNECTING LOCAL DONORS WITH LOCAL NEED

Variety of Annual Giving Donor Funds Program Services

#### HELPING NONPROFITS INCREASE THE IMPACT OF THEIR WORK

Competitive Center for Grant Program Philanthropy Education

#### Help them own the story

- Be consistent with high level brand messaging
- Personal stories are important proof points and engagement levers
- What are your most effective personal stories?
   How do you use them?

What's your STORY?

# Define what it means to deliver on the promise of the brand

#### Attitude: "I WILL"

- Appreciate your support.
- Devote my full attention to your needs.
- Take ownership of your needs.
- Be knowledgeable and professional.
- Be responsive to your questions and requests.

#### Actions: "I DO"

- Greet the client/donor with enthusiasm, use their name.
- Focus: Stop other activities, listen & ask clarifying questions.
- Transfer the client no more than once; own the issue & solution.
- Provide insight and information to help donor/client achieve their goals.
- Fulfill commitments in a timely fashion; recognize their time is valuable.

And build that into your performance evaluation system.

## Create a process for them

Contact Owner		Status		
Jane Smith	Michele	Sent annual report Jan 2015		
Peter Wright	Nancy	Coffee planned for February 15		
Sara Jones	Michele	Attended info session December 2014		
Alicia Wayne	Jeffrey	Non-responsive		
Garrett James	Jeffrey	Invited to info session March 2-15		

#### Measure and reward

Example Indicator	Retention Rate	Engagement Index	Median Gift Size	Non-Ask Ratio	New Donor Number	Brand Strength Rating	Future Commitment
THE TOP OF THE PRIOR OF THE PRI	Measures % of donors retained from prior year.	Determines % of new donors who report having learned of organization through an existing donor or volunteer.	Identifies dollar amount of median (not average) gift in total donor base.	Indicates ratio of non-ask contacts (e.g., gratitude, evidence of impact, or general warmth and kindness) to solicitation contacts.	Counts number of new donors introduced per year.	Reflects, in aggregate, the confidence of board and staff in the strength of the organization's brand – both internally and externally.	Quantifies gift commitments for future years – excluding current year
Example Indicator 85% 70% 68%	INSTRUCTIONS Calculate percentage of prior year's donors who gave in subsequent year (e.g., from 2008 to 2009).	INSTRUCTIONS Determine % who report being inspired by a volunteer or donor to initially make their gift or become involved with the organization.	INSTRUCTIONS Calculate median of all gifts per year. Do not confuse with mode or mean. See reverse for review of the distinction between mean, median and mode.	INSTRUCTIONS It is acceptable to set a goal ratio for non-ask contacts and use this as a benchmark, instead of measuring every single contact.	INSTRUCTIONS  Count number of new donors added per year.	INSTRUCTIONS Twice a year, have all board and staff members answer the following: "On a scale of 1 to 10, how confident are you that we consistently & compellingly explain what we do and why we do it?"	INSTRUCTIONS List dollar amount of current pledges to become payable over the next three (or five) years.
	FOR GREATER DEPTH  Only after retention rate is adequately measured and managed, determine % of retained donors who increase, decrease or main- tain gift size. Additionally, segmenting retention per	FOR GREATER DEPTH  Ask what inspired first-time donors to become involved or give. Identify whether the reasons change over time and build on these strengths in programming and marketing.	FOR GREATER DEPTH Set annual goals regarding increasing median gift size. Be conservatively ambitious.	FOR GREATER DEPTH  Be creative, innovative and strategic with increasing quality contacts with donors that do not involve asking for money.	FOR GREATER DEPTH Segment new donor numbers for relevance — whether by gift size, geography, or program area.	FOR GREATER DEPTH Once a year, conduct an inventory to see how/if brand and marketing tools such as logo and messaging are used in materials, both on & off-line. Make them consistent.	FOR GREATER DEPTH Set goals regarding the number of additional pledges to be made annually – then measure and manage performance.

#### And the final three...

- Keep it coming from the top
- Show you mean it
- Pick your battles

#### Above all...

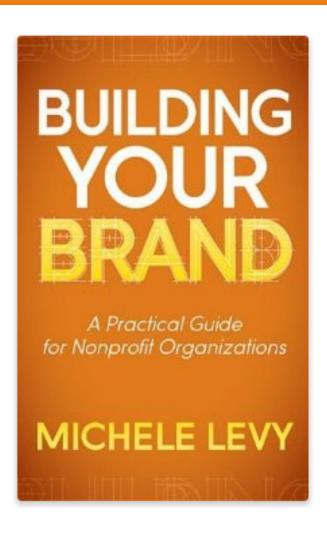
# "If you're going to be a leader, lead at a speed that people can follow."

- Rabbi Jonathan Sacks

#### Discussion

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#### Learn more...



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## Thank you!

