THE PANORAMIC BRAND EXPERIENCE AUDIT

An analytic process designed to help marketing organizations diagnose, redesign and implement a richer and more engaging brand experience for their customers by looking at channel-specific best practices as well as applying a cross-channel, persona-based perspective.

In theory, enlightened marketers these days are committed to delivering an integrated and engaging experience to their customers. Why then, in practice, do they all too often approach that goal in a disintegrated and haphazard fashion, relying on information architects to optimize the online experience, brand planners to optimize communication strategy and designers to optimize the store experience? This kind of sub-optimization results in a brand experience laden with obvious gaps and non-sequitors that confuse and irritate customers.

One aspect of *Brand Forward* marketing is the use of analytic processes that unite theory and practice to deliver more insightful diagnoses, more targeted redesign efforts and more practical solutions — put into the field faster.

For our CRM/customer engagement practice, we call this process the Panoramic Brand Experience Audit. Not so much because it represents a 360° channel perspective (which it does), but because we assess the brand experience both vertically from a business process view, as well as horizontally from a target segment persona perspective. This kind of Brand Forward analysis allows clients to make organizational changes to support a better customer experience and uncover real competitive advantages.

The following two-step auditing process used by Mechanica is comprehensive, yet cost-effective enough to use on a regular basis as part of on-going brand experience optimization protocol.

This first step starts by constructing a process framework that identifies the key business drivers and consumer touch points for the brand. Key business drivers are things such as merchandising, communication, customer service and social interaction strategies that, in combination, create the experiences that turn into fruitful brand relationships over time. The touch points are simply the channels used to deliver the various components of the experience.

We find it's often the case that specialists with valuable expertise, but a myopic view of the brand experience, manage the channels and key business driving dimensions. While it's not realistic to think that a consumer will experience the brand across all points of contact, it is highly likely that they will interact with the brand in multiple — and sometimes unpredictable — ways. Charting out the totality of the process allows for the assessment of each component alone, as well as in combination, to get a clear picture of how consistent and exciting the brand story potentially is or isn't.

We did this recently for a global fashion retailer that prides themselves on knowing their customers and providing an extremely rich and engaging brand experience. For their six major channels, we identified five categories of business driving experiences, each comprised of multiple criteria constantly evolving to reflect marketplace realities and consumer expectations.

	Website	Advertising	Store	Catalog	Soc Media	Call Center
Merchandising	• Product Categorization • Core Merchandising (e.g., product descriptions, cross/up-sell, product zoom, etc.) • Advanced Merchandising (e.g., use of rich media, shop by body type/occasion, comparison tools, etc.) • Order Process • Shopping Services & Loyalty Offerings • Sales/ Promotions (e.g., availability and accessibility)					
Content	• Branding/Look and Feel • User Interface/Content Architecture • Value-Added Content • Freshness of Content • On-Site Search					
Customization	• Registration (ease, collection of relevant preference information) • Customization of Experience • Personalization (based on user history/behavior)					
Service	• Self-Service Care Options: Post-Order Services; 800 Number, Outbound E-mails • Advanced Technology (e.g., text chat, callback services, telephony) • Returns (ease/speed)					
Participations	• Information on Offline Events • Customer Input/ Peer Reviews or Testimonials • Web Events (e.g., Online events to facilitate customer interaction – Q&A with product experts) • Value Added Partnerships/ Services (e.g., encouragement of customers to engage in content/ activities of like-minded partnership communities and promotions)					

The five categories representing their business driving functions were merchandising, content, customization, service and participation. The definition of each and some of the key assessment criteria used in our audit are detailed below.

Content: Advertising, catalog copy, graphics, store design, call center scripting
• How strong is the look, feel and voice of the brand?
• How compelling is the content in support of the brand positioning?
• How does it add value to the product?

Merchandising: Tools for browsing, site/store/catalog navigation, loyalty
• How easy is it to find and evaluate items?
• How well are questions dealt with?
• How smooth and secure is the purchase process?
• How recognized and appreciated does the customer feel?

Customization: Registration, personalization
• How useful is the profile information collected?
• How relevant is the content or the offers served based on history?
• How dynamic is the personalization?

Service: FAQs, customer service protocols, help, service prompts
• How accessible is service?
• How prompt is it?
• How useful is it?

Participation: Facebook, Twitter, communities, reviews, events
• How well is the brand's voice represented?
• How vibrant are the conversations?
• How integrated are online and offline events?

We do this first assessment with our expert hat on, rating the engagement strategy against industry best practices. This is the "in theory" part of our analysis. It sets a benchmark for the type and quality of brand experience the customer should expect within each channel.

In the case of our fashion retailer, they seemed to have a pretty well thought out strategy, and with some exceptions, should have been delivering a world-class brand experience to their customers. Their model provided lots of opportunities to surprise and delight their franchise and build long-term relationships and advocacy. So far, so good. Now for the "in practice" part of the exercise.

This is where the marketing expert meets the consumer expert. We take whatever consumer data is available (segmentation research, demographic and usage data, qualitative insights, industry analysis) and we construct user personae representing the key target audiences. Our investigators then assume these personae — much like actors assume a role — to interact with the brand in ways that that they imagine these customers might. This exercise generates huge returns by unearthing unexpected customer engagement opportunities as well as exposing critical problems with the brand experience.

For our fashion retailer, we used their segmentation strategy to create target personae for their ideal male and female customers, Jim and Judy, and wrote up simple narratives explaining who they were, what they were looking for and why they came to our brand.

Our Jims and Judys then ordered product online, called the help line, returned purchases, signed up for events, participated in online chats and on Facebook, chatted up sales reps in the store and basically got as deeply engaged with all aspects of the brand as they could, across all the channels. They rated the brand on all aspects of the experience, an experience which evolved the more they interacted with the brand. Still in character, they also did this for key competitors and innovative brands in other categories to look for things that our brand wasn't doing that might be relevant.

This cross-channel, persona-based approach yielded a treasure trove of helpful diagnostics that were put to immediate use in upgrading their brand experience delivery model. Some examples of the types of things that confused or irritated our investigators during their one-week stint as Jim and Judy included seemingly small, but highly telling shortcomings in the brand's ability to delivery the type of experience they were aiming to provide. For instance:

• Brand responses to questions on the company's Facebook page were formal and corporate. A total disconnect with the fun and quirky nature of the brand's personality.
• A telephone order from the catalog generated an email response thanking us for ordering online, showing that the brand didn't have its IT act together.

- Questions posed to the online fashion helpline took an average of 3 days to generate a response from someone who exhibited very limited product knowledge — sometimes no help is better than bad help
- We registered for a special, members only in-store event heavily promoted online and when we showed up, the sales reps in the store were clueless about the special occasion. This made us feel less than special.
- DM communications reflected no recognition of previous purchase patterns, location or gender. Why have a relationship with a brand that doesn't care to get to know you?

Summary

With the sophistication of today's marketing technology, consumers expect brands, especially those that are trying to become part of their lives in a significant way, to have their stuff together, and to use the information they collect to serve them better — not merely to sell them more. Designing and deploying the components of an integrated brand experience is a basic business process for contemporary B2C brands. It's a reality of Brand Forward marketing.

Making sure that the pieces deliver in practice what they are supposed to deliver in theory requires not only expertise but creative thinking as well. A Panoramic Brand Experience Audit is a useful tool to help you map out the intent of individual components of the experience and then take them for a test drive from the perspective of a target persona.

We'd jump at the opportunity to share more with you and your team about our approach to creating actionable Brand Engagement Strategies. For more information, please call Ted Nelson, CEO and Strategy Director at 978-499-7871 x101 or email tnelson@mechanicausa.com

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