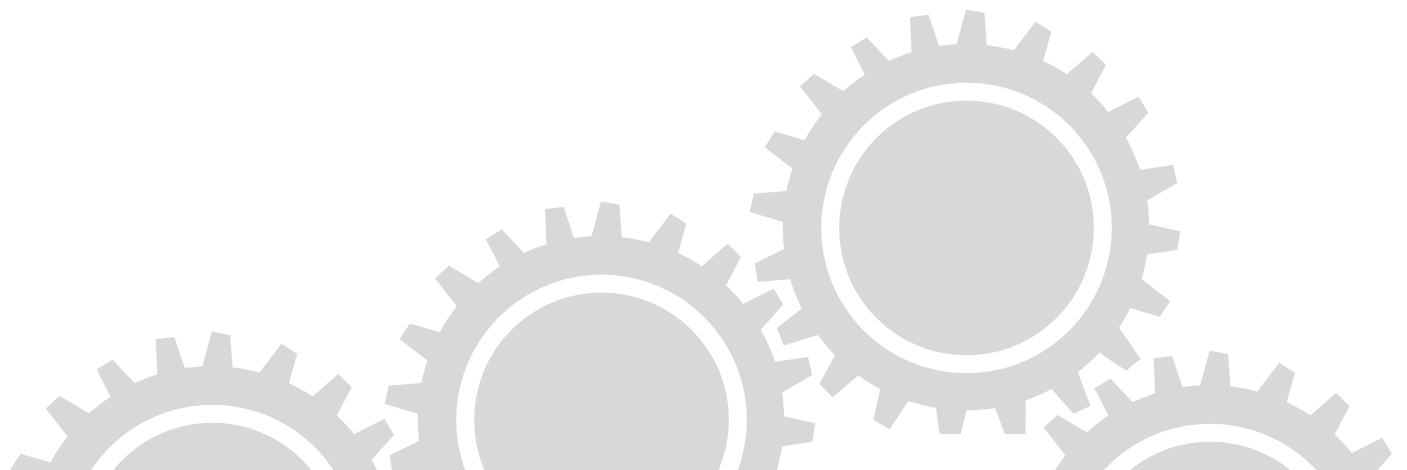


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# HARNESSING THE POWER OF INSIGHT-DRIVEN COLLABORATION

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The Insight-Driven Collaboration Session (ICS) is a proven *Branding Forward* approach to using multidisciplinary teams to more effectively arrive at a focused, data-driven brand position. The process synthesizes the huge amount of relevant and multichannel data available today into easily digestible chunks. This enables management teams to productively engage information and explore the implications of different positioning options across the entirety of the product and marketing mix. The final outcome of an ICS is not just a focused brand position, but also the shared team understanding, conviction and ownership required to efficiently turn the positioning into reality.



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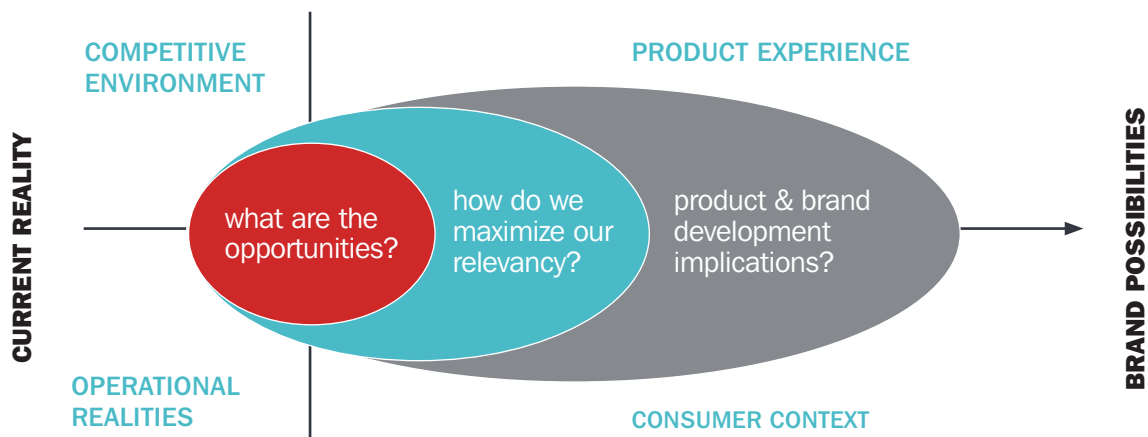
MECHANICA

“Information overload is a huge challenge for businesses. Companies are swimming, if not drowning, in wave after wave of data — from increasingly sophisticated computer tracking of shipments, sales, suppliers and customers, as well as e-mail, Web traffic and social-network comments. The quantity of business data is doubling every 1.2 years. Yet the data explosion is also an enormous opportunity. In a modern economy, information should be the prime asset — the raw material of new products and services, smarter decisions, competitive advantage for companies, and productivity. In a 2011 Wharton School of Business survey of 179 large companies, **successful data-driven decision making was defined not only by collecting data, but also by how it is used — or not — in making crucial decisions.**”

– NEW YORK TIMES  
April 2011

Successful positioning-driven business development requires an enormous amount of collaboration. All too often, attempts at cross-functional collaboration result in compromised, fuzzy thinking and lowest common denominator positioning outputs. Since it’s well established that the most powerful brand positions are the most focused ones, the challenge becomes how to arrive at a highly focused and singular position that is fully embraced and acted upon across a broad range of business units, each with differing priorities, beliefs, and success drivers. The traditional approach is to lead teams to singular answers and shared understanding via research and data, and only then to engage members in collaborative discussion of the implications. It’s an efficient process, but one that assumes that all members of the team would have interpreted the data similarly and are comfortable with the conclusions drawn by those in charge of the analysis. The *Branding Forward* mandate is to devise an approach that unites data and collaboration in such a way that actual insights are generated, real advances in understanding are made, and more focused and actionable conclusions are agreed upon with true conviction from all those involved.

Mechanica developed the **Insight-Driven Collaboration Session (ICS)** approach nearly eight years ago as a critical component for arriving at more focused, comprehensive and actionable positioning and creative strategies. Because we believe that to be effective, a positioning must impact the entirety of the business, product/service, and marketing development process, we sought to arrive at a methodology that would allow a variety of key stakeholders to play an active, highly engaged role in positioning development. That is, to elevate positioning beyond the realm of marketing and branding in order to maximize its impact on the entirety of the brand experience. Organizations find it most useful to undertake an ICS when they are seeking to move from today’s current brand and business reality to a state of maximizing a brand’s possibilities for growth and profitability. This could include seeking to identify new pathways for growth, encountering an environment of diminishing returns with respect to current business models, or facing game-changing externalities.



“As our business expanded, we arrived at a point where we needed to commit to a more focused business and brand positioning. The ICS proved invaluable for both identifying the opportunity, as well as driving internal consensus and future brand development efforts.”

– CHRIS TERRILL  
CMO, Nutrisystem

A successful ICS requires the collection of a significant amount of data and perspectives and packaging them in a way that encourages collaborative engagement by the team across important dimensions that impact positioning challenges and possibilities, such as the operational realities of the organization, the current and future state of the competitive environment, and the cultural and economic context of the consumer. A series of in-depth interviews with key stakeholders (many of whom will be attending the session) kicks off the process by helping to identify the range of needs, and degree of divergent opinion, a positioning must address. This is followed by three stages of preparation for the daylong collaboration session — Synthesis, Framing and Assessment — designed to facilitate effective collaboration and decision-making.

### **SYNTHESIS STAGE: CONQUERING DATA OVERLOAD**

Our analysts comb through existing primary and secondary data and conduct original research as needed. Additionally, our **Panoramic Brand Experience Audit** is frequently employed to generate a 360° channel perspective, assessing the brand experience both vertically, from a business process view, as well as horizontally from a target segment persona perspective. Finally, a comprehensive audit of potentially leverageable branding assets is undertaken. This audit spans both typical marketing and branding elements, as well as seeking to identify initiatives and customer contact points that might be more fully utilized to advance a given brand position. Key questions that are asked and explored during this stage include:

- Short and long-term business and product targets?
- Key audiences and interdependencies?
- Cross platform opportunities?
- Competitive insights?
- Drivers of differentiation and relevancy?
- Core values with greatest relevancy moving forward? Which are most differentiating?
- Existing assets and partners: degree of actual/perceptual brand integration?

The reams of data are then organized into digestible 15-minute modules summarized with preliminary conclusions and implications. This allows for the kind of collaborative discussion and debate capable of yielding true insight from the data.

### **FRAMING STAGE: TURNING DATA INTO INSIGHTS**

Following the data synthesis, leverageable insights and potential success drivers are surfaced to frame out a set of potential positioning paths. These paths are then evaluated against necessary business, brand and product development criteria to arrive at a short-list of potentially viable positioning and messaging possibilities. Key issues explored during this stage include:

- Who are the key internal/partner constituencies who need to be part of the process?
- What are the messaging paths currently under consideration?

“We’ve found the ICS to be a terrific way to ensure that we’re fully aligned to capitalize on the opportunities being presented by the dramatic changes in our industry.”

– ERIC KORMAN  
President, Ticketmaster

“After an extensive engagement with a top-level business consultant, we were still left with a confusing, and overly complex array of messaging options. The ICS process helped us quickly and efficiently arrive at the core idea ... we wouldn't be where we are without Mechanica's help.”

– JIM KIZIELEWICZ  
CMO, Kronos

- What has the core positioning to date been? What are its strengths and weaknesses?
- To what degree is the brand defined by past/legacy versus future/possibilities?
- What is the most important single reason for reassessing positioning at this point?
- Target audience, frame-of-reference, point-of-difference?

### **ASSESSMENT STAGE: THE POSSIBILITIES MEET THE REALITIES**

With a set of possibilities in hand, we develop a realistic set of positioning and business development assessment criteria and resultant positioning options, including high-level brand architecture and product and brand development implications. Key considerations during this stage include:

- Product and brand fulfillment requirements
- Ability to support with existing assets
- Key strategic and/or product initiatives that will need to be supported
- Most appropriate contact strategy
- What are the organizational alignment needs and opportunities?



### **THE ICS: GAME DAY**

Once the preparation is complete, the fun begins! A typical daylong ICS generally takes place in Mechanica's custom designed, ICS-dedicated facility. This highly creative and focused environment was carefully thought through to provide the kind of space and tools required to ensure teams are able to remain productively engaged throughout the day.

The day begins with **a thought-provoking, highly engaging exploration of relevant trends, issues and possibilities** driven by the 10-15 minute data chunks synthesized earlier. For example, during a Ticketmaster ICS, conversations about customer segmentation at this stage led to the decision to focus on getting the top 17% of their customers to spend more on a typical live event, rather than devote too many resources to getting infrequent customers to attend more frequently.

Next, we explore the implications of the insights generated to identify a number of viable business development paths articulated as positionings, including target

“The ICS process brought together our cross-disciplinary team, each with his or her own view on what needed to define our new offering, and helped us not only get on the same page so to speak, but actively propelled our thinking forward into this new world in which our new creation must thrive.”

– BOB LAPOINTE  
President, *Inc. Magazine*

“From my experience, there’s nothing quite like the ability of a *Mechanica* ICS to help with everything from arriving at over-arching marketing strategies to new product development breakthroughs.”

– RICHIE WOODWORTH  
President, *Saucony*

market, frame of reference, and point of difference. The positioning options developed in advance by *Mechanica* strategists and creative directors typically lead to a number of totally new options surfacing mid-session. These directions are explored using a Positioning Compass. This is a powerful data visualization tool that is anchored in the core insights of the day and plays a significant role in generating and understanding possible positioning options. For example, during an ICS for Kronos, the leader in workforce management software, we were able to look at three different options for turning the insight of “Kronos simplifies complexity” into robust and distinct customer-facing positioning options.

Once we’re confident that all possible options have surfaced, we proceed through a series of group assessment exercises and break-out sessions designed to productively move from a long list of possible positioning options to a short list of two to three viable options worthy of serious consideration. Importantly, each of these positioning directions is expressed both in terms of positioning language, as well as a high-level product delivery architecture. This includes key assets to be leveraged as well as necessary product development initiatives.

One proven tool we employ to help ICS teams find their way in crafting a positioning and brand architecture that encompasses new business models, propositions and brand experiences is to imagine what they might look like when viewed through a series of Concept Lenses. Each lens represents the contemporary cultural, technological, political and economic drivers impacting a customer’s or prospect’s emotions and behaviors. It’s kind of like looking through that machine at the optometrist where he flips through a series of lenses and asks if the eye chart is more or less readable through each one. It’s an exercise that brings issues into focus and helps marketers more easily see possibilities that represent new thinking in terms of what their brand experience could be, or what forms their new product might take to make it more relevant and distinctive. For example, for a project working to help *Inc. Magazine* create new content offering aimed at middle market companies, we were able to use Concept Lenses to fully visualize the relevant dimensions of a content offering that was not anchored in a traditional magazine context.

Finally, once we’re confident that we’ve fully kicked the tires on all possible options, and arrived at the most viable path for moving forward, we discuss the next steps and assign responsibilities. Importantly, because of the **collaborative, cross-discipline and cross-business** unit nature of the session, the conversation surrounding implications and next steps quickly moves beyond the limited confines of what marketing can impact, to the entirety of the business and product development and delivery implications. It is only through this holistic Branding Forward perspective that the inherent power of a given brand experience path can be fully unlocked and leveraged.

## **SUMMARY**

The Mechanica ICS process offers a strategically robust methodology for helping multi-disciplinary teams wrap their heads around rich datasets to arrive at actionable positioning conclusions and implications. It is driven by the best available data, key barriers are identified, complexity is embraced and deciphered (rather than avoided or ignored) and creatively inspiring tools are used to generate fresh pathways and possibilities to profitably impact the entirety of the brand experience.

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