

Don't just
talk to your
audience.



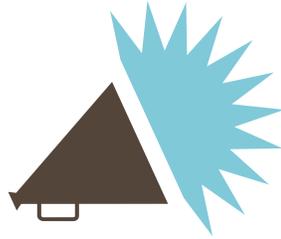
PERSUADE THEM.

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STRATEGY GROUP

Research for Effective Brand Positioning



THIS BOOK IS ABOUT MOVING PEOPLE *TO ACT.*

It's about positioning, which is the development of strong and impactful messages effective enough to motivate people to act.

It's aimed at corporate marketing and communication strategists, and the researchers who support them.

Great positioning is driven by powerful research.

We describe here the unique power of Motivation Research to provide information and structure to build strategy and communications programs. The common dimensions of Motivation Research will be explained throughout, with illustrations of how it can be modified to fit the needs of different positioning situations.

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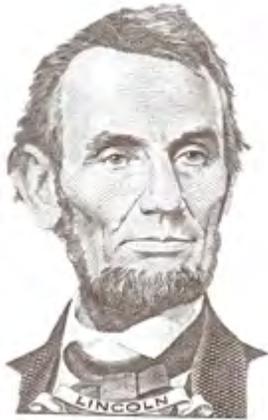
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PERSUASION: MOTIVATING PEOPLE TO ACT

Any initiative to get people to act in desirable ways requires an act of persuasion. The essence of persuasion is the delivery of a complete message that connects an appropriate set of tangible considerations to a set of personal values to help the decision maker perceive the personal relevance of the action. In other words: **Persuade with reason, and motivate with emotion.**

Motivate people to act by establishing personal relevance.

Great leaders provide some of the most memorable examples of effective persuasion, none more so than Lincoln in his Gettysburg address.



One hundred fifty years ago, Abraham Lincoln was struggling to hold the United States together. He needed to *persuade* the people in the Union to stick together and provide support for the dreadful struggle of the Civil War. He needed to *persuade* foreign governments to stay out of the conflict. And he needed to *persuade* the soldiers doing the fighting that it was worth continuing.

The Gettysburg Address was barely two minutes in length, yet it remains a symbol of a powerfully persuasive message that motivated people to act. Lincoln inspired millions of people to act by articulating a mission and establishing the *personal relevance* of the decisions he was asking people to make. It was a feat of persuasion sufficiently noteworthy to be carved in stone.

This eBook will probably not turn you into a Lincoln. But it will provide a theoretical framework and a process for building positioning platforms that have been proven effective by many of the most successful corporate marketers.

A THEORY OF PERSUASION THAT TAPS PERSONAL RELEVANCE

The **means-end theory of decision making**, used by some of the best marketers and communicators in the world for over 50 years to build powerfully persuasive programs, embodies the two key dimensions of persuasion: understanding the target audience's *personal values* and the *emotional links* that tie those values to a specific decision.

Personal values are the big ideas and aspirations that underpin what people seek in their lives. They are culturally derived; people develop them beginning in childhood. While there are common global threads, values differ across societies. Among Americans, there are approximately 20 prominent personal values. Security, freedom, self-respect and happiness are four examples of the values that are among those most commonly held by Americans.

Emotional outcomes are the feelings triggered by attaining a specific physical state such as "I get a feeling of control" or "it makes me feel like I'm taking care of my family." Those emotional outcomes are part of the "reason why" someone would choose to do something, and they contribute to the attainment of their guiding personal values. Importantly, these represent a more subtle understanding of emotions than simply the notion of being emotional; they're more than just "fear" or "happiness."



When people perceive that a specific decision will help them achieve important personal values, the decision becomes more personally relevant.

The most persuasive communication is achieved by making a **rational-emotional** connection tied to a specific decision. This is done by connecting the tangible attributes and benefits in a given decision to the emotional outcomes and personal values that tie to it.

PUT THEORY INTO PRACTICE THROUGH MOTIVATION RESEARCH

Means-end theory is brought to life through an approach we call *Motivation Research*.

Motivation Research is a unique type of research designed to gain an understanding in situations where a decision or a change of behavior is desired. The 5 steps of the process include:

1. The interviewing/data collection process develops an in-depth understanding of what motivates people to make specific decisions.
2. Respondents are directed to think of a specific context defined by an occasion and the associated elements.
3. Structured questions then help respondents think about connections between tangible dimensions and the emotional outcomes associated with them.
4. The resulting linked answers support mapping of aggregate patterns of thought, especially the rational-emotional connections that are evoked.
5. These maps provide a template and backup details that help formulate and assess alternative strategies and communication ideas.

The purpose of this process is to develop a holistic understanding of a category of decisions and where a company or its products fit within that category. **A company armed with this information has an action template to change behavior.**

These elements of Motivation Research all apply regardless of the focus of the task. But the context and purpose of the application influence how the work is executed. The remainder of this book provides examples of the three most typical corporate applications:

- Positioning a company
- Positioning for marketing needs
- Positioning issues.

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Motivation Research provides deep understanding of the rational-emotional connections involved in specific decisions.

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POSITIONING A COMPANY



UBS

In 2001, a relatively unknown

regional bank in Switzerland completed a series of major acquisitions that turned it almost overnight into one of the top financial institutions in the world. Among the acquisitions were the U.S. firm Paine Webber and S.G. Warburg, both fabled investment banks. UBS needed to create a positioning for the new company that would make these investments pay off with a meaningful brand presence.

Among the challenges UBS faced were the diversity of customer segments including individual, financial and business clients, and the desire to create a strong global identity while maintaining and growing local relevance to its audiences. The bank needed to establish the feasibility of a single global brand relevant to its various consumer and business audiences around the world.

Positioning is the language and visual symbols a company uses to present itself, its products and its ideas to the world, through its actions and especially through its communications.

The persuasion imperative in positioning a company

Here are five characteristics that define a persuasive company positioning.

1. It's about the relationship.

Company positioning is about the nature of the relationship the company offers each of its audiences.

2. Many masters.

Positioning a company requires balancing the interests and concerns of multiple audiences.

3. Diverse components.

The range of activities most large companies engage in presents a challenge in finding the common denominators that fit the company overall.

4. Higher standards.

Consumers evaluate products across sectors (Apple's products compared to GM's) so the comparison set extends beyond the industry.

5. It's about persona.

The company's positioning should be more than a summary of its parts; it should evoke its essence: the combination of tangible elements, behaviors and aspirations that give it meaning in society.

THE ROLE OF MOTIVATION RESEARCH IN POSITIONING A COMPANY

Motivation Research is a tool that helps tie together the five company positioning characteristics.

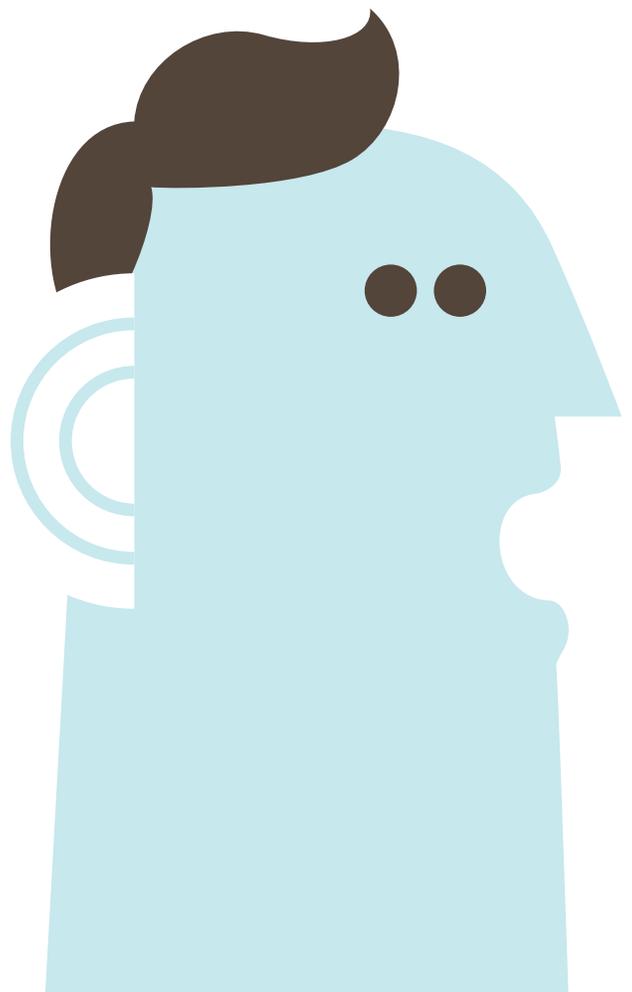
The UBS global positioning research was framed in the Motivation Research Approach, which provided the structure for evaluating and screening viable options for brand identity, positioning and architecture.

The key insight from this research was to crystallize the emotional dimensions of the relationship between customer and advisor, which was found to hold true across consumer, business and financial audiences. This led to the formulation of a promise to strive for client achievement, a customer experience based on a constellation of service factors, and a client benefit based on confidence in making a smart decision.

The resulting strategic framework found expression through the full communication and service program. And it provided the foundation for the firm's very successful "You & Us" advertising campaign that, after only a year, landed UBS in *Business Week's* top 100 global brands list (one of only five financial services companies listed), and winning the Advertising Research Foundation's top Ogilvy award for strategic research.

This same research approach has been successfully applied across the span of companies in financial services, consumer products, health services and many other industries with similar results.

Motivation Research helps
build a personally relevant
company positioning.



POSITIONING TO MEET MARKETING NEEDS

One of the core responsibilities of any corporate marketing group is to position the company's portfolio of products or services.

The greatest challenge and opportunity from positioning comes when innovation, technology, government action or some other external factor creates the circumstances for significant change.



There are three major considerations when positioning products or services:

1. **Fit with company.**

It's hard to have a product that doesn't fit the company persona.

2. **Maturity matters.**

The task depends dramatically on whether the product or service is long-established, a leader, a follower, has something new, etc.

3. **Audience mindset.**

Clarity of audience, its behavior and mindset impact the approach to positioning.

The persuasion imperative in marketing positioning

Understanding an audience's mindset is particularly challenging, especially when the goal goes beyond "continue an existing behavior" or "make a simple choice," such as switch brands. The real challenge comes when the goal is to motivate an audience to "take an unfamiliar action" or "take steps to accept what has been avoided in the past."

The first part of this task is to begin to characterize the audience. It may be described by a common behavior. That behavior could be something that they do (adoption of a new technology, for

example) or the opposite, something they don't do (failure to adopt a widespread behavior). Alternatively, it may be defined by some other characteristic that could be externally driven. While there may be some demographic similarities they often are weakly related to the behavior and provide little insight on motivations.

The audience's starting point also counts. Factors that motivate an early-adopter audience are quite likely different from those that motivate either a fast-follower or laggard audience.

The common denominator is that little is known about the audience's motivations. Here are a couple of examples:

1 Banks try to offer customers choices in how they interact, but the channels people use have different costs to the bank. For example, one bank discovered a customer segment that was seemingly interacting with the bank *solely through technology channels*. From a transaction standpoint, this was a positive, low-cost relationship. Could something be learned from this group that might be applied to others slower to adopt the technology channels? On the other hand, could those technology-based relationships create weaker ties to the bank that would diminish loyalty? The bank needed to understand whether these unique customers were more or less likely than others to expand their relationships with the bank.

2 The Affordable Care Act's health insurance exchanges create a new market opportunity for health insurance companies, but the target audience is significantly different from the audiences they are accustomed to targeting. Its defining characteristic is the absence of health insurance coverage. This audience, about 15% of the U.S. population, is hugely diverse and its motivational contours are poorly understood. Add to this the complexity of the health insurance purchase process on the exchanges, something Americans have not understood prior to their introduction. From an insurer's standpoint, the consumer's decision process can be seen to have multiple components: deciding to shop for insurance; shopping online through the market; and finally, selecting 'our' insurance offer.



The role of Motivation Research for a positioning aimed at a unique audience

When the issue is understanding an audience's mindset, Motivation Research provides insight by probing why people make specific choices, mapping out alternative paths of thought and using that information to gauge how they might react to a new situation.

Motivation Research helps determine messages that motivate change.

In the financial services example, the unique insight developed through Motivation Research was that even those who had chosen to interact solely through remote technology retained an attachment to the bank's physical presence. That created an imperative to design technology in ways that continue to evoke similar emotional links.

In the health insurance case, a key insight came from understanding the frustrations uninsured people had experienced in prior efforts to obtain insurance and the reassurances they would need to renew their efforts.

Motivation Research provides a structure for evaluating where a company's products and services fit within a category of needs.

POSITIONING WHEN THE ISSUE GOES BEYOND MARKETING

Some organizations have a set of positioning needs that fall outside the bounds of standard marketing. They take a stance and need a positioning when it comes to social responsibility, environmental responsibility (i.e. sustainability), community relations, issues management, and sometimes crisis management.

The outcome can affect the social, political or regulatory environment within which the company operates. In such cases the company's effectiveness depends on a blend of actions and communications that fit the company's persona and its corporate positioning. And in each case the Motivation Research approach can aid in developing the appropriate posture toward the issue.

The persuasion imperative in issue advocacy

Issues and the goals of the company relative to them are less tangible than products. As with product marketing, issue advocacy requires persuading your audience to "buy" what you are "selling." But instead of convincing your audience to buy a new product, you want them to "buy" into your ideas.

Companies face two big challenges relative to issue advocacy: the tangibility of the issue and its relationship to the company.

The opportunity here is that in social and policy realms big ideas rule, and the company that can associate itself with such big ideas can enhance its brand reputation. The hard part is the intangible dimension. There's no product to give tangibility to the issue. At the same time, existing values and beliefs about the issue can create barriers to acceptance.



Determining and conveying the proper relationship of the issue to the company is the second challenge. Companies have long confronted this challenge with their social responsibility actions. Some companies simply engage in good works... *any* good works. Smart companies engage in good works that fit with and enhance the company persona. And it's the same in confronting a political or social issue that affects the environment in which the company operates.

The role of Motivation Research in non-marketing situations

Motivation Research helps companies frame big ideas in the social and policy realms because it provides the analytical structure for examining audience perceptions of the business and issue category, where specific ideas fit within that, and what tangible and emotional components give such an idea its texture and relevance. By examining how audiences divide in their ways of thinking about such ideas, Motivation Research provides a values-based way to segment those audiences, to focus on the most important groups and to build permutations of their message when necessary.



Motivation

Research

provides a

strategic

template

for bringing

BIG IDEAS

to life.

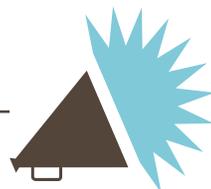
WRAPPING IT UP: MOTIVATING ACTION THROUGH EFFECTIVE POSITIONING

This Ebook focuses on the act of persuasion: moving audiences to make specific decisions that bring about change. It concentrates on the task of positioning, whether the purpose is to position a company, to position its products or services, or to position the company in other circumstances that go beyond its marketing purposes.

Motivation Research plays a significant role in building a powerful message positioning in any of these circumstances, even as the nuances of each positioning mission influence the way it is approached.

To summarize the most important outcomes and applications of Motivation Research:

1. It supports strategic choices by mapping a decision landscape using the audiences' perspectives.
2. It provides depth of understanding across the range of decision-making levels spanning rational and emotional components.
3. It shows how choice patterns interact in a specific context.
4. It is highly customized; it reflects the unique circumstances and needs of an individual company.
5. It serves as a touchstone for a full array of company mission support activities.



ABOUT ARTEMIS STRATEGY GROUP

Artemis Strategy Group is a marketing research firm that specializes in Motivation Research and communications strategy. We provide research and consulting to a range of public and private sector clients using a variety of research approaches.

Using our unique Motivation Research Approach we help clients understand what motivates people to make specific decisions. Fueled by means-end theory, Motivation Research demonstrates how the tangible aspects of your company or organization connect with the emotional needs of your audiences so that your communications strengthen the personal relevance of your brand or mission.

Our research services include:

- » Audience Motivation Research
- » Brand positioning research
- » Communications strategy development and measurement
- » Thought leadership and public release studies

Our clients represent several industries including financial services, industry associations, government, and health and nutrition, among others.



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