

POSITIONING AN ORGANIZATION

This article is the second of a series addressing the topic of persuasion and building effective messages for public and private communications programs. As we proceed we'll explain and give examples of our motivation research approach, and we'll introduce the Motivation Assessment Program (MAP), a program of research and analysis to extract new knowledge on communications and techniques for building effective messages.

In 2001 a relatively unknown regional banking power 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 was the U.S. firm Paine Webber, one of the fabled names in the investment banking community. Compounding the risks of the acquisition, the company chose to retain its own Swiss name, UBS, eliminating Paine Webber and other iconic financial names such as SG Warburg, arguably a serious destruction of brand goodwill. That meant that, strong as it was financially, UBS needed to establish a meaningful brand presence. Thus UBS embarked on one of the most common corporate efforts at persuasion: creating a positioning for the organization.



Brand and Mission. Organizations are not just bundles of functions. The way in which an organization conveys its persona, through a brand positioning, can have a tremendous impact on its success. And while the brand should always be in service to the organization's mission, it also becomes stronger to the extent it is meaningful to the organization's constituencies. In banking that means tapping into what people look for from a bank relationship and conveying how the brand gives that relationship meaning beyond being a commodity service.

UBS embarked on a brand initiative that combined an internal examination of opportunities with an extensive research project to gain deep understanding of its customer audiences. Among the challenges they faced was 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 research needed to establish the feasibility of this idea of a single global brand with powerful relevance to its various consumer and business audiences around the world.

Five challenges in developing a persuasive organization positioning.

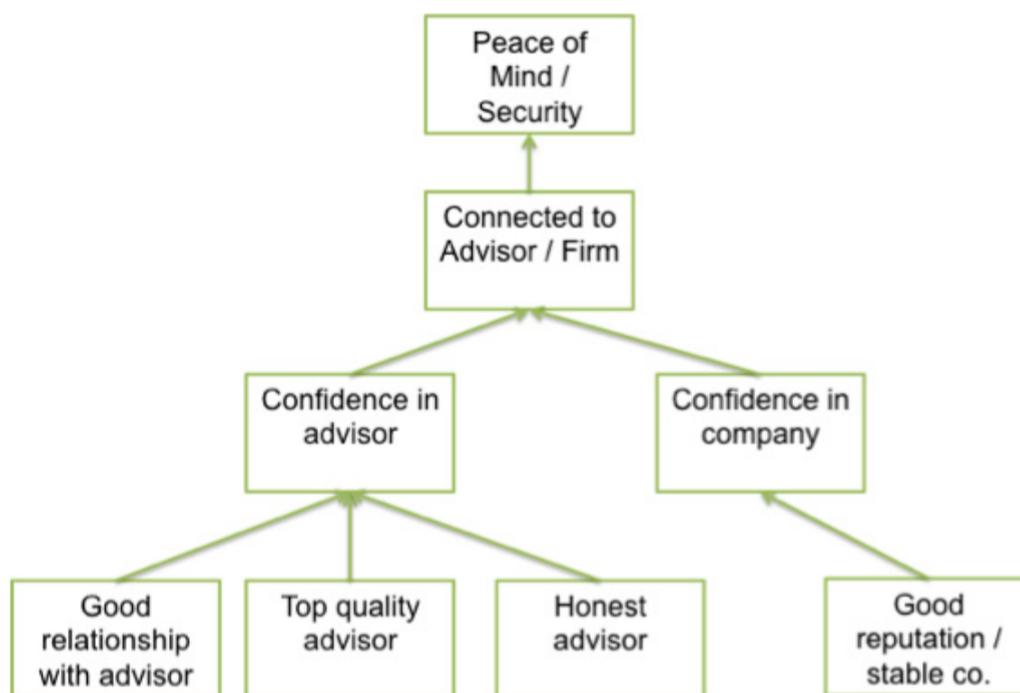
- 1. It's about the relationship.** An organization positioning is serious business. It can't be superficial and it can't be short term because it's ultimately about the nature of the relationship the organization is offering to its constituencies.
- 2. Many masters.** Positioning an organization requires balancing the interests and concerns of multiple constituencies, each with different and potentially conflicting interests.
- 3. It's about Persona.** The organization's positioning is less tied to a specific product or service than it is to the essence of the organization. That essence may be difficult to discern, even among insiders.
- 4. Many components.** Organizations don't have to be terribly large before their diversity begins to make finding the common denominators within the organization challenging.
- 5. Higher standards.** When people evaluate companies they don't just compare to like organizations. They compare to all companies, often on traits remotely connected to the company or its industry. Dell is not just compared with Hewlett Packard but with Kellogg or Viacom.

The Role of Motivation Research

Motivation Research is a uniquely powerful tool to help organizations like UBS develop persuasive positioning platforms for their brands. The core reason is that Motivation Research uncovers both the rational and the emotional elements of decision-making of important constituencies. The process follows each individual's own thoughts as they reflect on their decisions. The results almost invariably provide new insights on what audiences seek by going beyond the elements that are the common denominators of any industry (especially a service industry such as banking) and, importantly, pairing that insight on motivations with the proof points that align it with customer experience.

The UBS global positioning research was framed in the Motivation Research template and led by Artemis partners. As initial customer research results were combined with the internal opportunity analysis, the Motivation Research format provided the structure for evaluating and screening viable options for brand identity, positioning and architecture.

The key insight from this research crystalized around the relationship of the customer and their individual advisor, which was found to hold true across audiences. This is depicted in a "pathway" of thought from one of final maps produced from the research:



The analysis also 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 undergirded 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 at 45th as one of only five financial services companies listed.

Could UBS have learned what they did and built the positioning they did through another method? Possibly. But Motivation Research led by Artemis partner Jon DeWitt provided the channel for gaining unique insights into the personal and business values of their audiences, the framework for analyzing alternative patterns of thought, and through that analysis the guidance to make strategic and creative choices for positioning and communication.

Motivation Research is unique, powerful and effective because:

1. **The process** allows results to be structured in a specific manner that makes analysis and strategic decision making easier.
2. **Questions** are framed within a specifically defined decision context.
3. **The full competitive set is included** within that context to capture the way that people interact with the business category.
4. **The output is in the form of maps.** Data is transformed to information by categorizing and mapping individual's thoughts to create patterns of thought based on multiple audiences that are depicted in a formal visual structure. These maps provide the canvas for strategic decisions making opportunities.

Every organization is unique. While the basic elements of brand positioning are common, the circumstances of any company or other organization can be substantially different, presenting a unique set of challenges.



Here are a few examples of organizations with their own imperatives.

When a strength has become a weakness:

In another example of strategic positioning, a major financial services organization had to overcome a surprising weakness. The wealth management sector of a leading Canadian bank found its prospects were being wooed by alternative appeals. This market-leading company with a strong constituency was surprised to find they were being perceived negatively by new prospects as stodgy, among other things. Some of the characteristics that made

it appealing to its established base were seen as weaknesses—out-of-touch—by a growing new wealthy population. In a fast-paced world, this is the kind of challenge that many established organizations can find themselves confronting. In this case, Motivation Research conducted among the bank's loyal base, those who were considering alternatives, and unattached prospects identified pathways to improve the positioning. The opportunities and change requirements revealed by this research helped the organization calibrate internal organizational changes and it also laid out a framework that guided the organization's efforts to recast itself to appeal more successfully to both existing clients and new prospects.

Standing out in a crowded field:

Sometimes the “corporation” is another kind of organization. In this case it was a highly regarded public policy graduate school concerned that it was being overlooked by top candidates and other constituencies. Anyone familiar with the world of higher education knows that the power of reputation in that world is significant and even though “competition” is not quite the same as in the corporate world it is nevertheless intense. In the public policy space, the number of schools has gone from a few dozen to over 250 in just a few decades. Many in academia, as in the non-profit world, have been reluctant to draw too close a parallel to the corporate world. But every organization needs to communicate its mission and goals in a manner that motivates positive action.

In addition to mapping the perceptions of this school, understanding the competitive landscape was critical to identifying a unique position. Motivation research mapped the perceived strengths of major competitors versus the organization’s own. Importantly, especially for a school, this mapping showed the specific thought connections being made between specific tangible characteristics of the schools and the benefits, emotional outcomes and higher order values they evoke. It was this detailed thought mapping that provided a path to understanding and calling out a set of striking characteristics that appeal strongly to a particular kind of prospect. As is often the case, this affirmation of a unique strength made it easy for the school, its leaders and its members to find their voice around an integrated communication strategy.



Five Takeaways

Positioning occupies one end of the spectrum on the continuum of persuasion tasks most organizations are likely to confront. We view a positioning as a companion to a mission statement, constituting the basic framework for building the reputation of an organization. A strong positioning is the basis for building the future and should serve as a bulwark against all the setbacks an organization might encounter.

We emphasize here the role of Motivation Research in building effective positionings because we believe it is an extraordinarily powerful tool. Briefly, here are the top reasons we recommend our Motivation Research approach to anyone responsible for an organization’s positioning.

1. It is designed for depth of understanding. The constituency-focused query structure probes across four levels of decision-making both rational and emotional.
2. It focuses on the key goal of differentiation by highlighting the ways that different choice patterns interact.

3. The structure supports strategic choices by mapping out all the important dimensions in the landscape of a specific decision type.
4. The approach has flexibility for the wide range of circumstances and needs that an organization might encounter in its unique positioning effort.
5. It serves as a touchstone for a full array of organization mission support activities that center around communication but extend into other aspects of organization training, services and products.

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