




# **BUILDING THE BUSINESS CASE FOR BRAND**

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## Introduction

### **A New (and Constant) State of Marketing**

In the spring of 2020, the Vena team embarked on an overhaul of our existing brand strategy. Partnering with design and innovation consultancy Studio Science, we kicked off Vena's foundational brand work to align our strategy and core customer brand from pre-sales to advocacy. The project represented a full-scale revisioning of how we onboard new Vena customers into our customer experience and journey and how we win the hearts of Vena customers with every touchpoint.

But shortly after we completed onboarding and research for the project, the pandemic began to unfold itself across the planet. Businesses were forced to reorient themselves to a new and completely unknown landscape.

The intersection of crisis, innovation, and market conditions creates a surprisingly fertile ground for demonstrating the value of a well-plotted marketing strategy—particularly when there's little budget to rely on. As marketing leaders, we have to keep the business going in both the short and the long term. Often times changes are excellent opportunities to reorient ourselves to our customers, community, and the market at large.

Marketing leaders can leverage change and move the needle by using brand as the lens through which an entire business is viewed.

## Key Takeaways

As you consider updating or improving your brand identity, keep these elements in mind:

### **01 Formalize and socialize your definition of brand**

Once you've crafted the definition of your company's brand, focus on sharing it with all stakeholders: the executive suite, all team members, and any prospective agency partners. By sharing your approach to brand, you can empower every part of the team to use it to inform every decision they make.

### **02 Operationalize your work through sprints and playbooks**

A big job doesn't have to happen all at once. Engage with targeted teams and projects, prototype solutions, test and refine them, then launch them as they're ready. This iterative approach allows for faster execution and more frequent, easily identifiable wins. And those wins make it easier to gain buy-in across the organization.

### **03 Use broader brand metrics**

Successful companies know that a healthy brand impacts more than hard numbers; those traditional KPIs are also reflected in demand, efficiency, and team confidence. Measuring those elements can deliver much more information about the health of your organization and the attitudes of your customers.

### **04 Live your brand**

A brand is a living, breathing entity—and it needs to be tended to grow. Once you've established your brand values, it's important to ensure those values are demonstrated authentically in everything you do, from internal communications and employer brand to demand gen and customer experience.

## Stuck in Idle

### Why Brandwork Stalls

Brand is foundational and can influence everything from demand generation to product roadmap and partnership strategies. Done well, it can influence how you relate to customers, bring alignment across your teams, and empower your organization to work more efficiently. So, why do so many businesses get stuck in idle when it comes to their brand?

#### Executive Buy-In

Gaining consensus to invest in foundational brand work is always challenging. Securing executive buy-in—particularly during times of uncertainty—is exceptionally difficult.

#### Team Capacity

A brand overhaul can feel like extra work for a marketing team—both the foundational work and rollout to broader teams.

#### Organizational Silos

It's nearly impossible for marketing leaders to work holistically; silos will develop even in the best companies. Corporate hierarchies, competing objectives, and even internal politics can make it harder to achieve alignment and consensus.

#### Measuring Success

Traditional success metrics can be useful in the short term but rarely tell a brand's entire story. Using technology to broaden the concept of metrics beyond demand generation paints a more accurate picture of a brand's health, providing guidance on how to adjust as customer and market needs change. ●

## Shifting Brand Into Gear

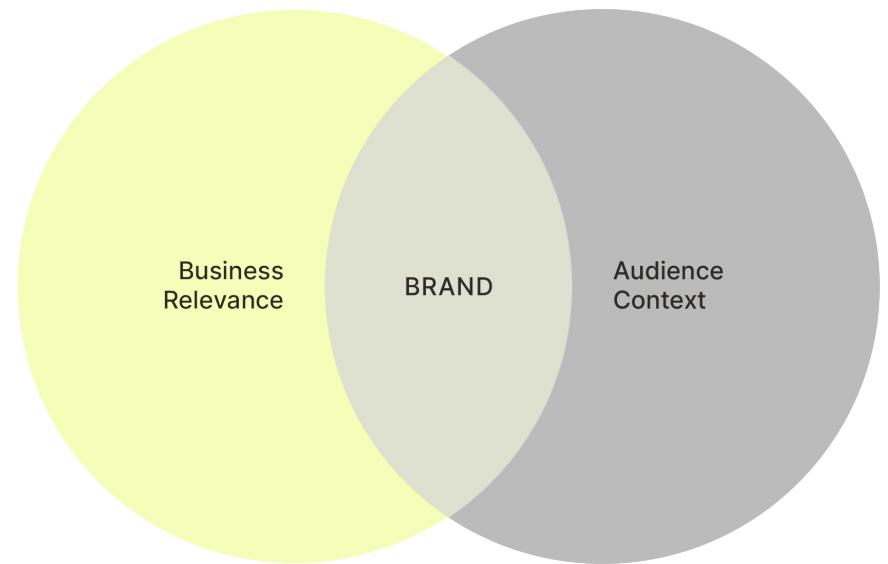
### Making the Case for Brand

Through our work with design and innovation consultancy Studio Science, we discovered we could:

- Influence how we relate to our customers
- Bring alignment across our teams
- Empower our organization to work more efficiently

### Start by Defining It

We started by creating and socializing what brand is and what it influences. Our definition identifies customers as our core, which helped align focus and apply that definition to every aspect of the organization. We mapped our core brand identity to key revenue levers as well as the needs and goals of various stakeholders.



**Figure 1:**

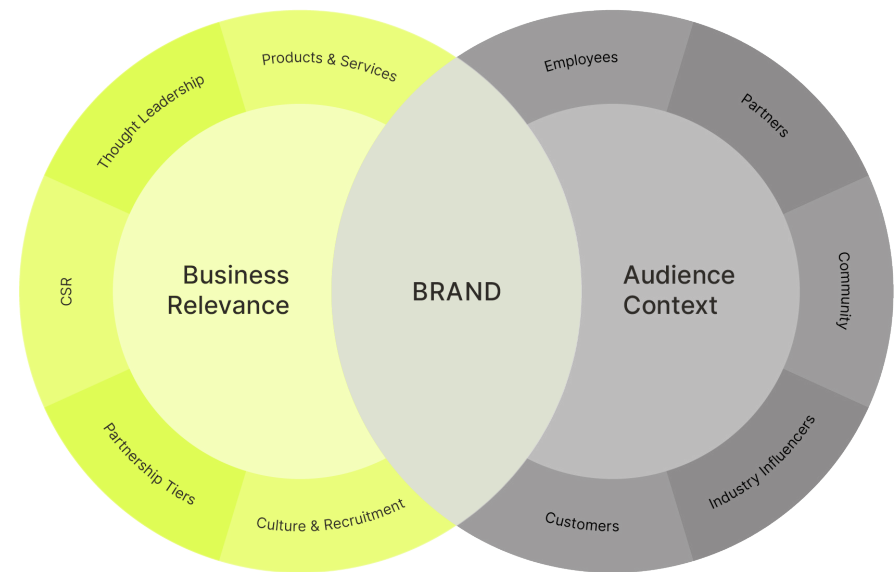
**Our definition:** Brand is how the world experiences and interacts with your business; it communicates how and why a business is relevant in the context of people's needs. A brand's position integrates its core values, products, and messages in a way that enables each to reinforce the other.

## Shifting Brand Into Gear

Socializing brand as something that benefits all audiences allowed us to gain support from executives and department leaders across the organization.

Brand encompasses all of a businesses touch points and audiences, it can impact:

- How customers and prospects interact with a product.
- How prospects feel during and after an experience with a company.
- How employees feel about the company they work for (culture).
- How a company engages with its communities.



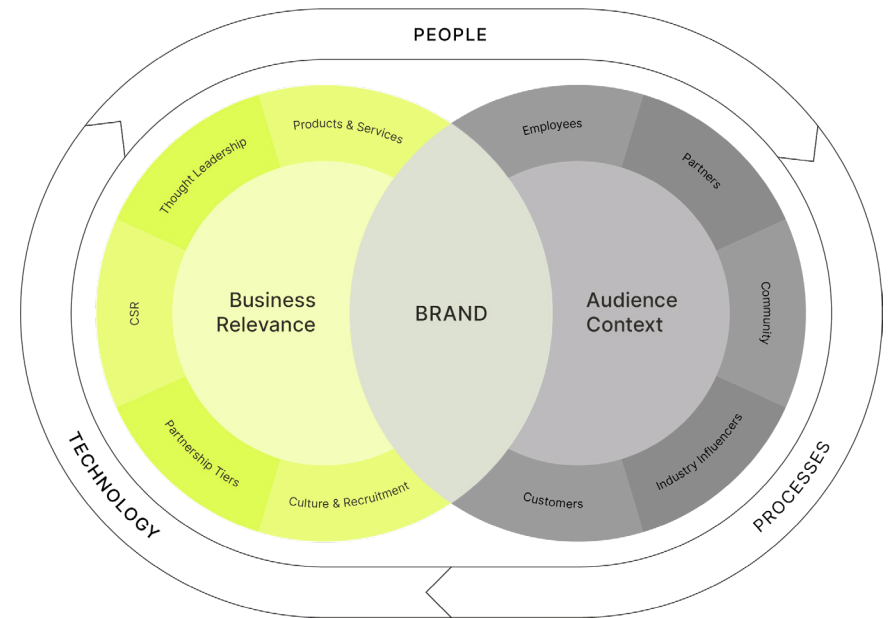
**Figure 2:**

*Scope of influence: Brand encompasses all of a businesses touch points and audiences.*

## Shifting Brand Into Gear

### Tie It to Revenue

This is key for executive audiences. A company's brand is its nucleus, the core from which its product, values, and experiences grow. That means a CMO's central role is to raise awareness, engagement, and, ultimately, revenue. Whether you're just building your revenue engine, or modifying your existing engine, if it's fueled by a brand lacking relevance, it will fail. It needs to perform and adapt regardless of market conditions.



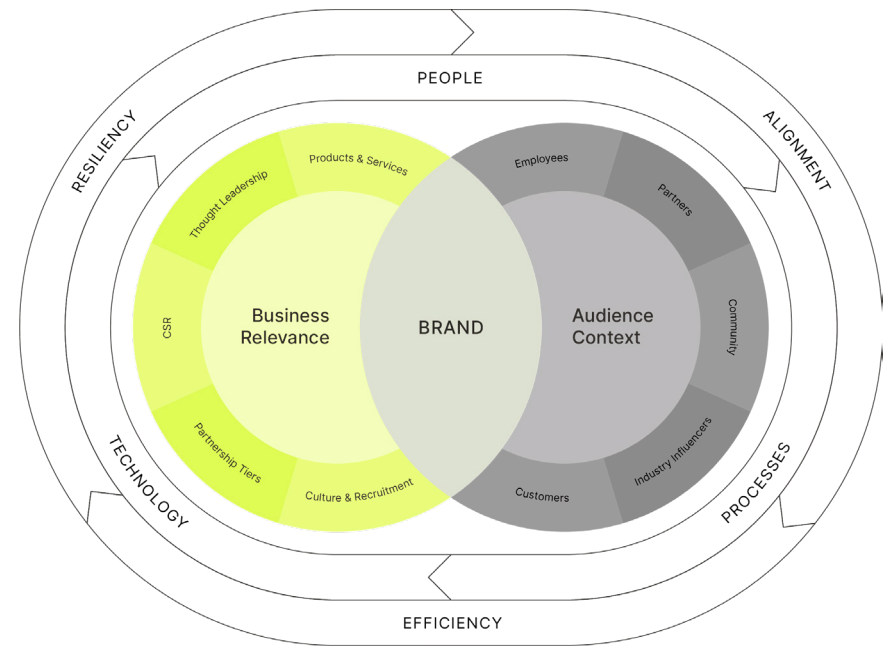
**Figure 3:**

**Revenue engine:** People, processes, and technology operationalize the engine, but a relevant brand is what fuels it.

## Shifting Brand Into Gear

### Tell a Bigger Value Story

The benefits of foundational brand work can be realized in every area of a business, for all audiences, at all times. It can identify and resolve areas of misalignment; it simplifies decision-making for revenue teams; and, when paired with the right technology, it can act as a barometer to identify changes in audience needs or perspectives.



**Figure 4:**

*Business value: Brand benefits demand generation, team efficiency, employee confidence and efficiency, and even product roadmap.*



## Shifting Brand Into Gear

### Executing Brand

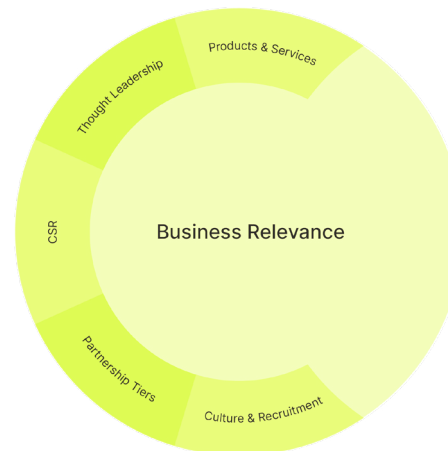
Aligning a business around a definition of brand is one thing, but executing foundational brand work can be an immense challenge, especially for internal marketing teams. We discovered the process could be guided by the three Fs: **focus**, **flexibility**, and **feedback**. These serve as foundational principles that would ultimately guide how we built our brand.

#### Partner

Identifying a business's problems and challenges can be tough because you're bringing your own experiences and biases to the issue, which is why enlisting a partner is important. A good design partner can create a sense of urgency and work as a forcing function to create alignment. We partnered with a design and innovation consultancy, Studio Science. They served as an experienced consultancy and unbiased evaluator, guiding us toward a new direction to take the Vena brand.

#### Focus: Assess and Prioritize

A good design partner provides more than colors, a tagline, logo, or sales decks. They work to understand your product, your goals, and your audiences; they identify the strategic decisions that need to be made, and they help you prioritize both the tactic and the timing. Studio Science brought an objective point of view in its assessment of our brand. This helped us **focus** and identify gaps in our value propositions.



**Figure 5:**  
*With insight and consulting from Studio Science, we began to assess and prioritize the most critical elements of our brand.*

## Shifting Brand Into Gear

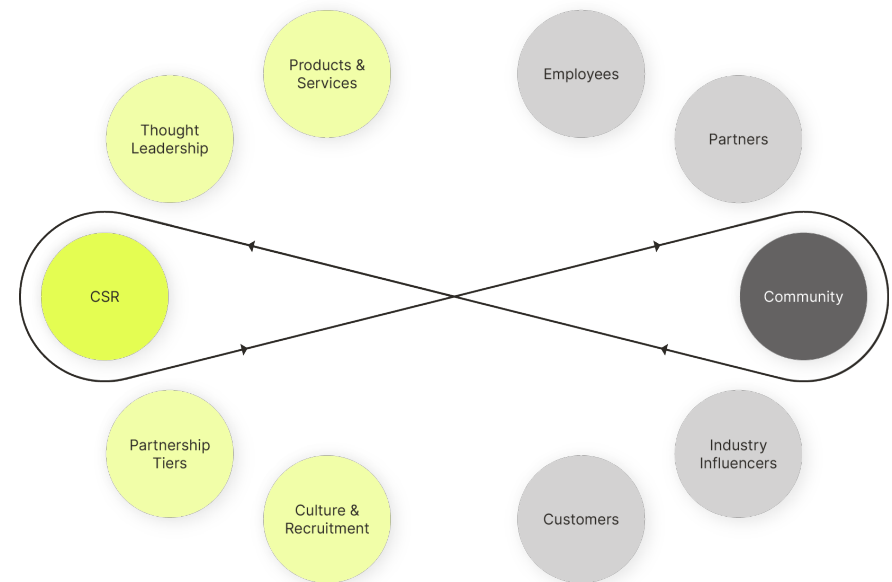
### Executing Brand (cont.)

#### Flexibility: Approach it Incrementally

Traditional brand agencies often have a lengthy onboarding period, keeping your stakeholders and approvers in limbo for months before seeing any identifiable wins. Studio Science's modular approach to building the Vena brand offered us the **flexibility** to address our most critical needs, and gave us quick-hitting wins along the way to keep our stakeholders enthused. We addressed each element in turn to execute and iterate on before moving on to another aspect.

#### Rapid Focussed Feedback

Taking an incremental approach to brand helped us develop rapid **feedback** loops with internal subject matter experts and external audiences. Our agency partner was able to prototype positions and messages for our sub-brands. This helped us prioritize by channel and market conditions, and craft GTM materials that delivered our core messaging for specific audiences.



**Figure 6:**  
*Iterate consistently: Rapid focused feedback loops.*

## Shifting Brand Into Gear

### Operationalizing Brand

Customers, their goals, and the markets are always in some stage of change. It's up to marketing leaders to weather each storm and to lead their organizations toward stability and strategic growth. That requires a clear understanding of your company's brand and how that brand shows up in the marketplace.

#### Rollout

A strong core brand is built to last, which means you don't have to refresh it every time the market changes. As customer and market demands shifted, so did we, focusing on a single brand element and leveraging our short-term agility for long-term growth. We were able to quickly finalize GTM kits for each element of the brand, using our brand identity as the core and tailoring them for areas like employee brand.

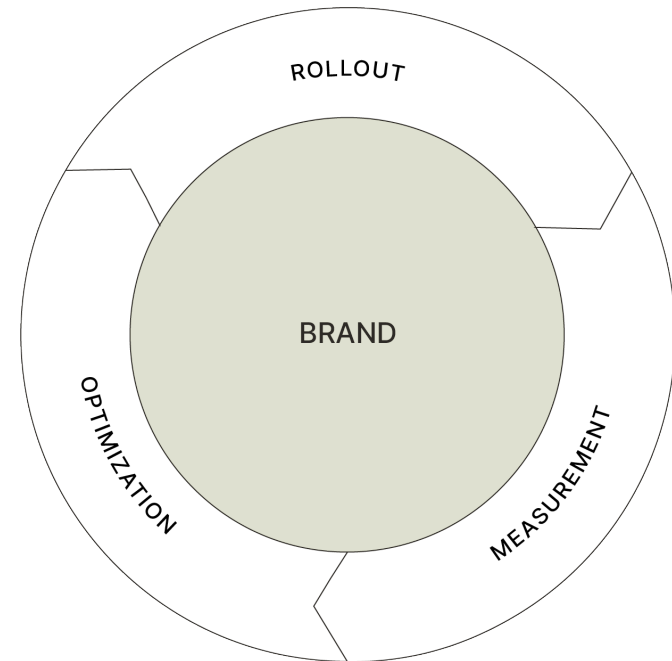


Figure 7

## Shifting Brand Into Gear

### Operationalizing Brand (cont.)

#### Measurement

Most boards and executive teams expect sentiment metrics, which are notoriously nebulous. And knowing that efficiency metrics tend to lag, it's important to adopt other metrics; correlating gains in early indicators such as increased reach, engagement, conversion, velocity, and ultimately revenue throughout the buyer's journey, customer lifecycle and partner experience. We had the opportunity to align our tech stack to our strategy of iteration and optimization: software like *6sense*, *Wynter*, *Microsoft PowerBI*, and even *Vena* gave us the insights to support our business case.

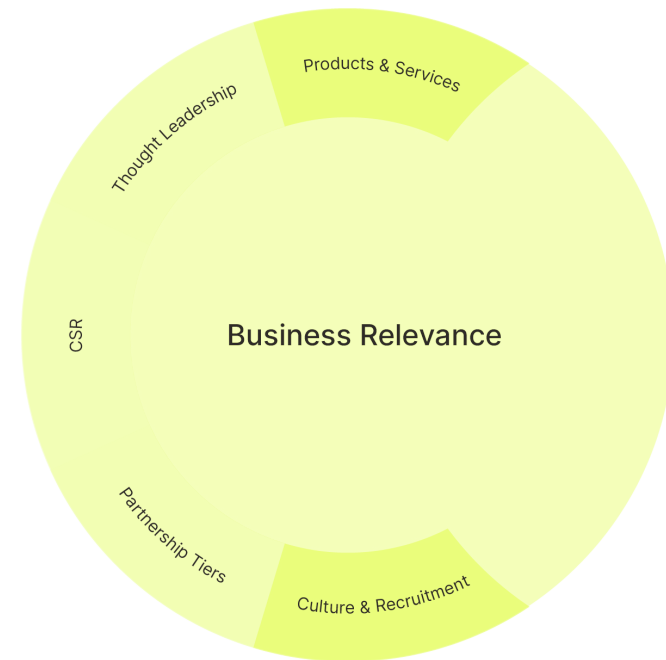


Figure 8

## Shifting Brand Into Gear

### Operationalizing Brand (cont.)

#### Optimization

No matter which tactics you use, they won't convert if they're not relevant to customers and prospects. In a previous brand exercise, we focused only on optimizing for the people, processes, and technology; but we failed to optimize our positioning and messages. You can't truly optimize one without the other. With rapid iteration, customer feedback, and deployment, the Vena marketing team was empowered to deliver marketing strategy that was both effective and easier to measure. ●

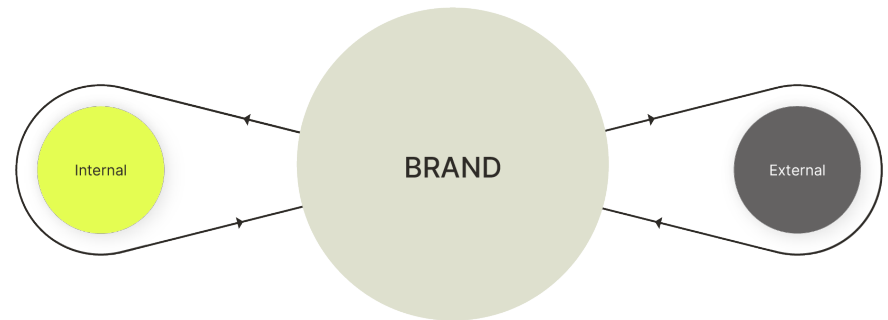


Figure 9

## Assembling Your Brand's Building Blocks

### A Step-By-Step Approach

Our exploration of brand offered us several lessons. We learned that adversity compelled us to look for executable solutions while also focusing on foundation, requiring a balance of tactics and strategy. We also learned that status quo is an efficiency killer; in times of crisis, it's easier to go back to what's always been done rather than search for new solutions. But a modular approach to brand can help develop healthy habits for marketers, giving each element the attention, resources, and creativity necessary to fuel our go-to-market engine.

### Build Your Business Case for Brand

We're all bound to face new and different challenges in the near and long term. That's the default for SaaS companies in general and marketing leaders in particular. By using this approach—and by engaging with a knowledgeable partner—you can weather any storm. ●

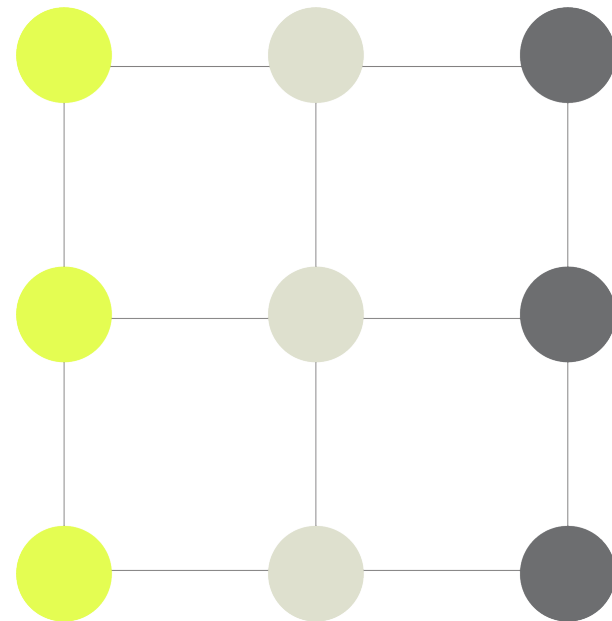


Figure 10

