FocusVision + INNERVIEW

Have Your Story Straight? Why Brand Message Dilution Hurts in the Experience Economy

A joint study by InnerView & FocusVision

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Overview

Brands are spending marketing dollars at an increasing pace in an attempt to win customers with their unique message. In 2018, companies were on pace to devote $207 billion to marketing and advertising in the U.S., an increase of 5.2% over 2017 (MANGA, 2018).

However, the advertisements customers see are only part of their experience with a brand. The true faces of the brand are the people who represent the company—the front-line employees and partners who interact with customers every day. There is growing evidence that interactions with those front-line employees are driving a customer's purchase decision and their overall impression of the brand to an increasing degree (PwC, 2018).

This joint InnerView and FocusVision research set out to understand the interplay between these two forces. Companies are spending more on marketing, but the interaction is increasingly important for the actual buying decision. Marketing gets the customers interested, but the front-line employees have to get the transaction over the finish line. Is Marketing telling the customer one story, and front-line employees saying something different? What is the impact to the business if Marketing and customer-facing teams are misaligned?

To investigate these questions, we conducted a 10-minute online survey with 250 senior professionals from mid and large size companies (revenue $250M+). All within the sample work in Marketing, Customer Experience, or Product Development roles and 80% indicated having responsibility for their department's budget. In the survey, we asked respondents to share their attitudes and company tactics on three topics: customer research, brand story/messaging, new go-to-market initiatives.

Company Revenue

4%
$251M–$500M

22%
$501M–$1B

74%
More than $1B
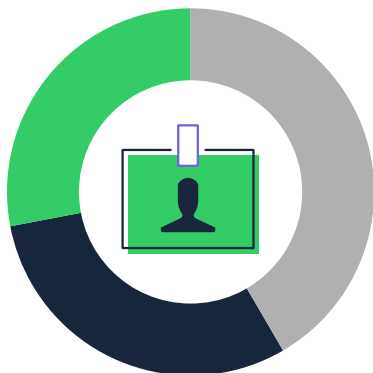
Job Role

42%
Marketing/Brand or Product Management

30%
Customer Experience
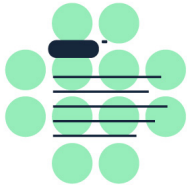
28%
Product Development

Key Findings

Crafting the Brand Story: Not all Companies Fully Leverage Customer Insight

Customer research is widely used in organizations, but many companies do not fully leverage it to properly craft and execute their brand message.

The Brand Story is Getting Diluted Internally

Marketers lack confidence that their story can be told consistently when it leaves their office.

The Cost of Dilution is Huge

Nearly two-thirds of respondents estimate the value of a consistent message at $10MM or more annually.

Speed is a Complicating Factor

The rate of introduction of new products, services, promotions, and campaigns makes alignment even harder, with more than half of companies launching products on at least a quarterly basis.

Marketers Need a New Way

The ways marketers are mobilizing their teams are outdated. Just as their external marketing has gotten more dynamic, their internal mechanisms need to catch up.

The findings demonstrate that marketing organizations **are struggling to create one consistent message across all customer interactions.** There is clear misalignment, a significant cost to companies and a lack of direction on how to improve the situation.

# The Brand Story: Not All Companies Fully Leverage Customer Insight

It all starts with the customer. Successful brands understand the importance of knowing who their buyer is; their needs and preferences; the experiences they have, how they think, feel and act. Customer insights shape the brand message and the strategies companies use to appeal and connect to their buyer.

Encouragingly, our data shows nearly 95% of firms having a customer research program, with the majority of resources devoted to customer experience research. Surveys and focus groups top the list of approaches that brands use to know their customer, but in-depth interviews and usability tests are also standard. There is nothing surprising about this finding. It is a natural assumption that a company would draw upon insights they have about a customer to make decisions around how to influence that audience.

Does your company do any customer research?
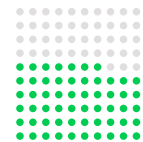
94%
Yes

6%
No
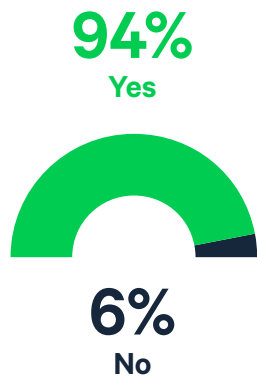
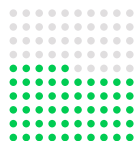## What type of customer research does your company do?
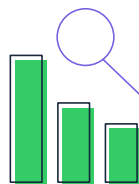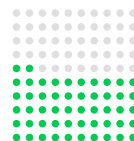
82%
Customer Experience
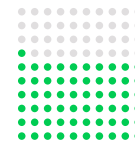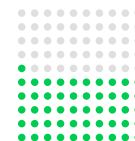
61%
Brand Awareness
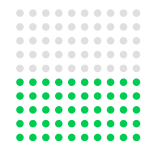
57%
Product Development

55%
Persona/Market Segmentation

52%
Advertising Messaging

51%
Brand Perceptions
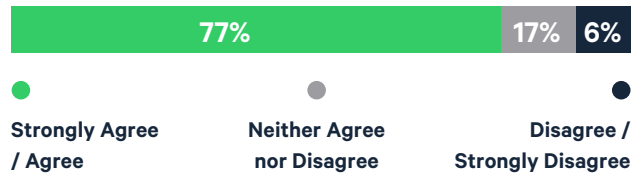
50%
Brand Strategy Messaging

However, there is room for improvement when looking at how companies are leveraging customer research. Conducting research is not enough; it needs to ask the right questions at the right time in the right way, and there is still the matter of connecting customer insights to the ongoing brand strategy.

Among all the companies conducting customer research, 90% report using it to shape their brand story; the unique value proposition that companies are communicating to their customers. Beyond this, we begin to see some drop off in what they know about their customers. Although 77% have a clear understanding of their customers' needs and preferences through research, only 53% use customer research to inform their brand and product messaging regularly. Moreover, while most companies engage in customer experience research, when it comes to understanding insights in other areas—such as brand experience, brand messaging, product development—even fewer companies are engaging their customers.

While our findings show that customer research holds a place in every company, the data suggests **the value of it is not being utilized to its full extent.**

For instance, 90% of respondents report using customer research to shape the initial development of their brand story, but only half cite regular use of research to inform their ongoing brand initiatives. This indicates a lack of consistent and comprehensive application of research to understand and know the customer. In the "Achieving Consistency" section, we will see that it is a significant contributor to an effective brand story. Brands with fully integrated Research and Marketing functions have much greater success at maintaining company alignment and control of how their brand story is told.

"My company has a clear understanding of our customers' needs and preferences through research"

77%	17%	6%

● Strongly Agree / Agree   ● Neither Agree nor Disagree   ● Disagree / Strongly Disagree

EVERY TIME ━━━━━━━━━━ NOT AT ALL

9% Every time

44% A lot

How much does your customer research inform your brand and product messaging?

1% Not at all

36% A moderate amount

10% A little
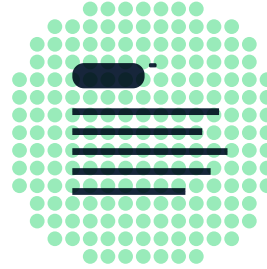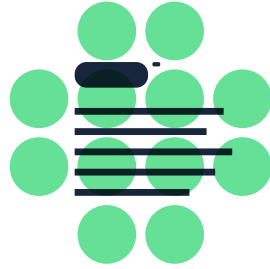
The Dilution: The Story Is Getting Lost in Translation

Without a clear understanding of the customer, it becomes challenging to craft and execute an effective brand story. Our findings show that many companies struggle in this area, with the potency of the brand story diminishing as it gets relayed inside the company. Marketers develop and control the brand message that is delivered externally. They choose what words, themes, and promises are delivered through direct marketing investments. However, it appears that many marketers are losing control of that message as soon as they start to disseminate the brand story to the internal teams and channels that ultimately handle live interactions with customers.

Twenty-one percent of the study's respondents indicate their company has not attempted to define a clear brand story for their internal teams. So more than 1 out of 5 companies have failed to take what they know about the customer and distill it into a clear message for their company, including Sales, Customer Service, and other customer-facing roles. For those companies, misalignment between their external brand promises and their brand execution is a certainty.

> When there is nothing to align to, **it is likely that each department is operating in silos and interpreting their role in serving the customer and representing the brand for themselves.**

Has your company defined or attempted to define a brand "story" that describes its value proposition?

79%	12%	9%
Yes	No	Don't Know
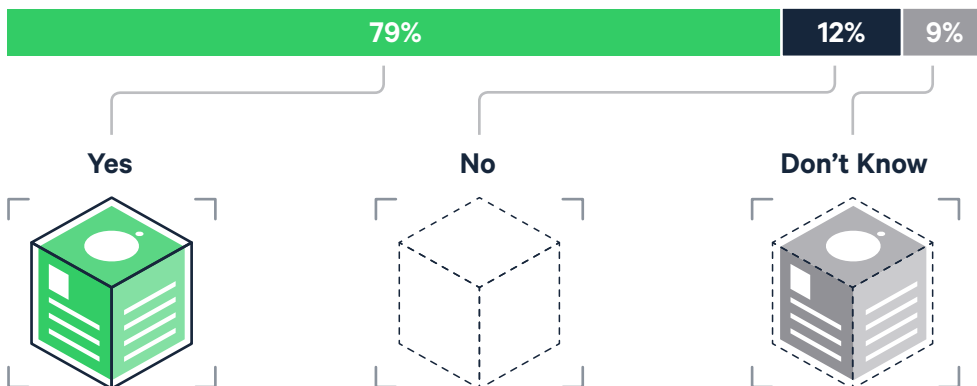
How confident are you that the people across your organization can tell your company's brand story accurately and consistently?

43%	45%	12%

● Extremely / Very Confident   ● Moderate Confidence   ● Very Little / No Confidence
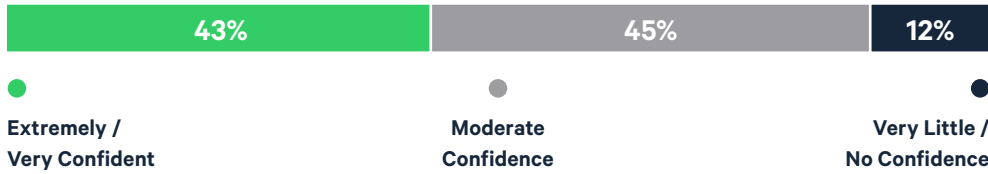
Of the 79% of companies who have attempted to define a clear brand story for their employees and brand partners, alignment remains a challenge. Only 43% of those professionals indicate they have a high degree of confidence that people throughout their organization can tell the company's brand story accurately and consistently. Another 45% express moderate confidence, and 12% share little or no confidence that they have internal alignment.

When considered together, these two factors produce a conclusion that only roughly one-third (34%) of Marketing, Product and Customer Experience professionals believe their company has defined and can tell a consistent brand story. That leaves 66% recognizing a significant gap in brand alignment.

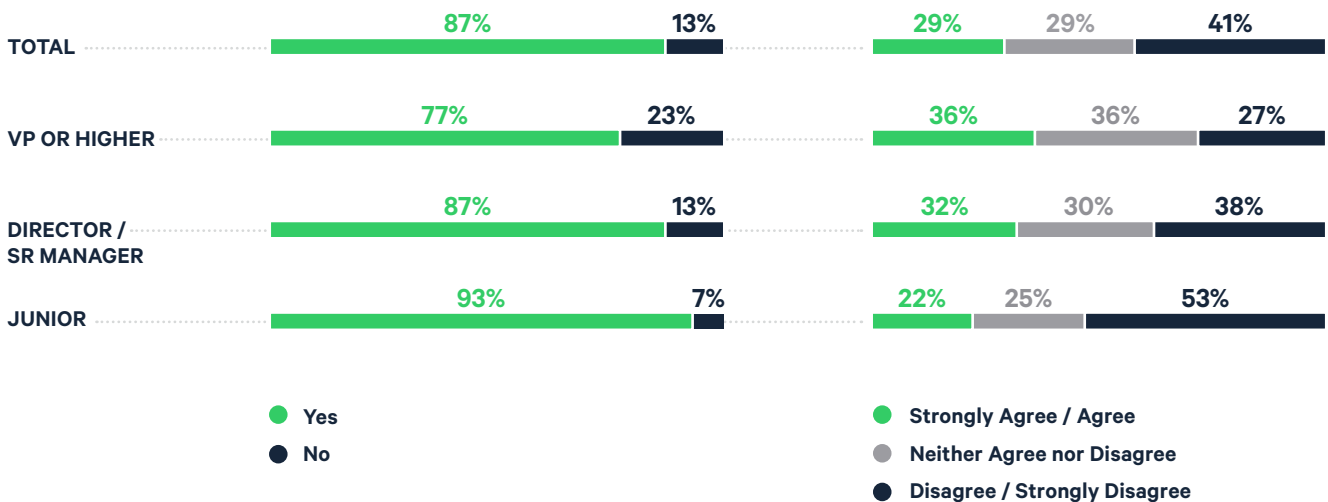Interestingly, those at the Vice President level and above were even more critical of their company's alignment. These more senior leaders are nearly two to three times as likely to say that their company has not defined a clear brand story. In addition, the data shows that the higher you go in the organization, the more likely the person is to indicate that their brand story is getting diluted as it moves through the company.

Has your company defined or attempted to define a brand "story" that describes its value proposition?

How strongly do you agree or disagree with the following statement: My brand's story is getting distorted/diluted by the time it reaches the end buyer?

	Yes	No		Strongly Agree / Agree	Neither Agree nor Disagree	Disagree / Strongly Disagree
TOTAL	87%	13%		29%	29%	41%
VP OR HIGHER	77%	23%		36%	36%	27%
DIRECTOR / SR MANAGER	87%	13%		32%	30%	38%
JUNIOR	93%	7%		22%	25%	53%

● Yes
● No

● Strongly Agree / Agree
● Neither Agree nor Disagree
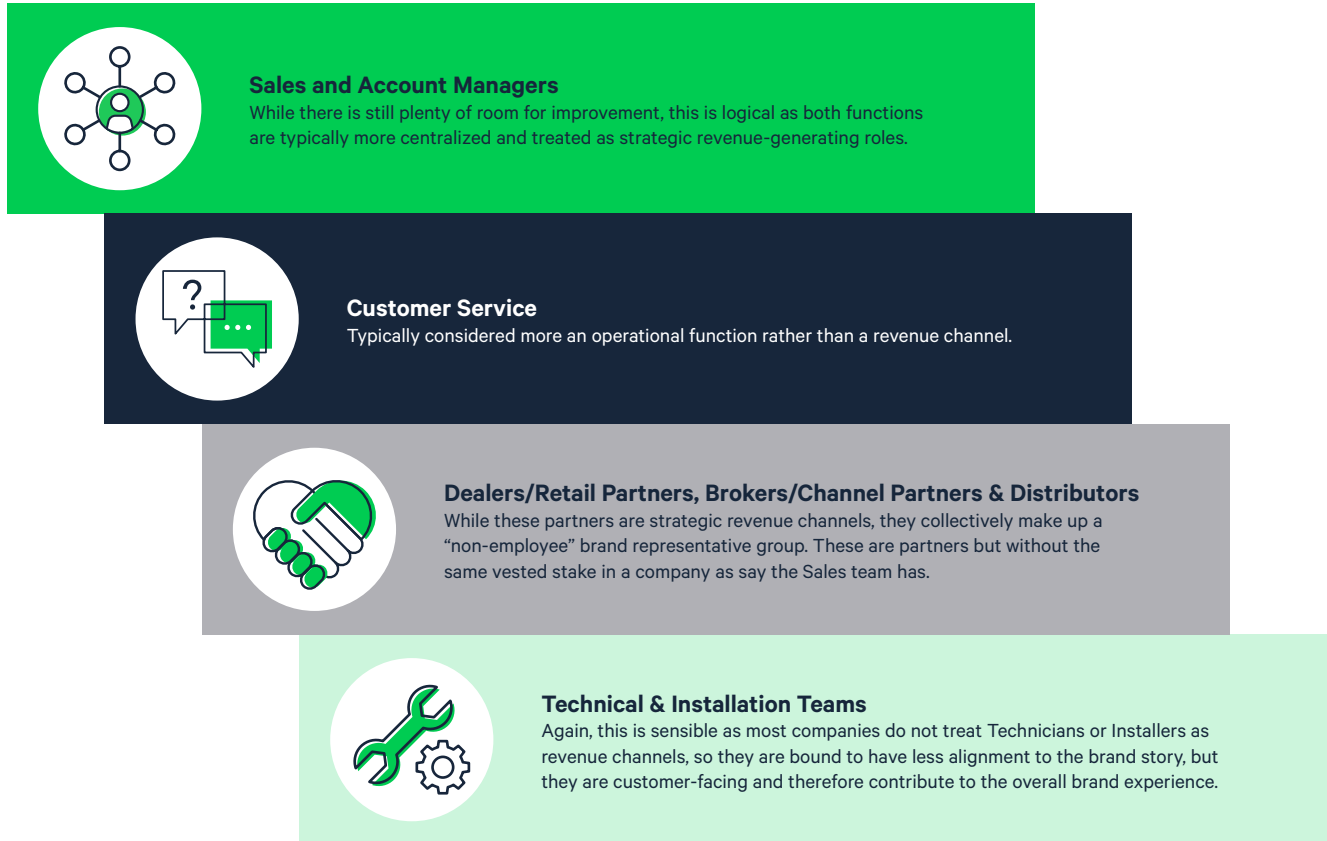● Disagree / Strongly Disagree
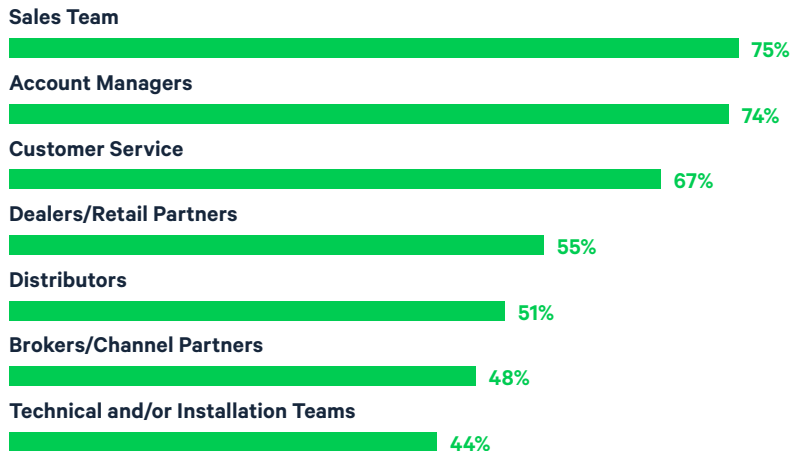
Consistency is Hard to Maintain Downstream

Given the data outlined above, there are indications that the company's brand story is not trickling down from the leadership ranks to the rest of the organization. In our study, we attempted to pinpoint where some of the breakdowns might be happening.

Exploring the various audiences who have regular customer contact, who we will refer to as "brand representatives," the dilution appears to be greatest the further away you get from the C-Suite. When asked how confident they were that various groups could tell the company's brand story accurately and consistently, the findings show a waterfall of brand story dilution.

Sales and Account Managers
While there is still plenty of room for improvement, this is logical as both functions are typically more centralized and treated as strategic revenue-generating roles.

Customer Service
Typically considered more an operational function rather than a revenue channel.

Dealers/Retail Partners, Brokers/Channel Partners & Distributors
While these partners are strategic revenue channels, they collectively make up a "non-employee" brand representative group. These are partners but without the same vested stake in a company as say the Sales team has.

Technical & Installation Teams
Again, this is sensible as most companies do not treat Technicians or Installers as revenue channels, so they are bound to have less alignment to the brand story, but they are customer-facing and therefore contribute to the overall brand experience.

How confident are you that the following groups can tell your company's brand story consistently in front of customers?

'Extremely / Very Confident' Responses

Sales Team 75%

Account Managers 74%

Customer Service 67%

Dealers/Retail Partners 55%

Distributors 51%

Brokers/Channel Partners 48%

**Technical and/or Installation Teams** 44%

While this steady waterfall of brand story dilution makes sense, it should be no less concerning for those in Marketing, Product Management, and Customer Experience.

Take Dealers/Retail partners as an example. If a marketing campaign is successful and attracts customers to a retail store to make a purchase, roughly half of the respondents believe the associate that the customer encounters will struggle to represent the brand accurately. That means half of potential buyers could hear something different than the marketing that caught their attention in the first place, in turn putting at least half the sales immediately at risk. If the marketing messages promise one thing, and the person in the retail store does not embody that promise, the brand will struggle to differentiate, and the customer experience associated with that brand suffers. The next section details the customer costs incurred when this kind of brand dilution occurs. As referenced above, companies are spending more on demand-generation, but the value of each dollar spent goes down if demand cannot be turned into sales.
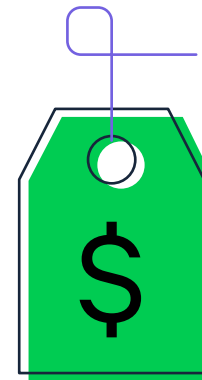
The state of the Technical and Installation teams highlights a different kind of pain. While these groups are not a primary source of sales transactions, in many cases they spend more time in front of the customer than any other brand representative. At a minimum, they have a responsibility to deliver on the brand promise and back up the experience the customer had when they made their purchase. At best, they have an unparalleled opportunity to make a lasting brand impression on the customer. That face-to-face interaction can lead to additional sales, referrals, higher customer satisfaction, and improved loyalty and retention. They might not be viewed as a "sales" channel, but they are certainly a "brand" channel.

> In today's Experience Economy, it's essential that **all groups** within the organization represent the brand and its story in the same manner that lives up to the brand promise.
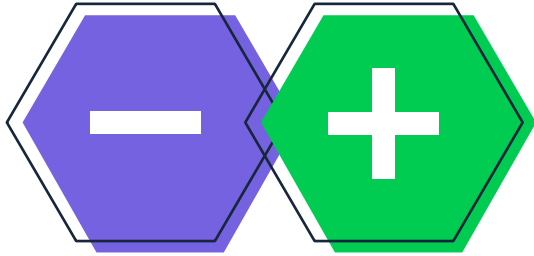
The Cost vs. The Opportunity:
What is Brand Consistency Worth?

There are two sides to the brand story. The cost incurred—revenue lost—due to dilution, and the opportunity cost—revenue gained—due to consistency. We explore both below.
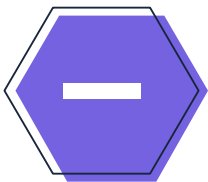
The Cost

If the brand story dilution data above sounds like it could be costly for companies, it is.

Study respondents were asked to evaluate the cost of dilution along with the value of message alignment. While this might seem like semantics, the data tells an interesting story.

> A total of 59% of the respondents agree that their brand story **is getting diluted before it reaches the buyer.** When asked to quantify the cost of the message dilution, more than a quarter (28%) say the cost is at least $10MM annually, with another 24% estimating **$6-$10MM in lost revenue**[1].

In conjunction with this question, respondents were asked what impact the diluted message has on the customer experience. Not surprisingly, roughly half of the respondents believe there is a negative effect on the customer and the company, with consequences including **leads to unmet customer expectations** (53%), **causes customer confusion** (51%) and **leads customer to consider alternative options** (49%). On top of the estimated direct impact in dollars, all these negative outcomes directly damage the brand's reputation.

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1 All respondents were from companies $250MM in revenue or larger, so company size was not a primary driver of the cost impact.

If you were to guess, what's the annual cost to your company as a results of a distorted / diluted brand story?
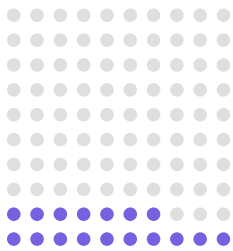
17%
Less than $1M
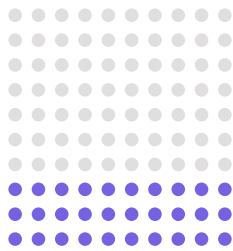
30%
$1M—$5M
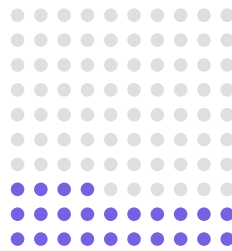
24%
$6M—$10M
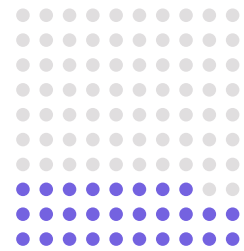
28%
More than $10M

How does the distortion / dilution of your brand story affect the customer experience?

Causes customer confusion

51%

Leads to unmet expectations

53%

Leads customers to consider alternative products / solutions

49%

No affect on customers

5%

The Opportunity

While the costs of dilution appear to be high, the reality is those struggling with misaligned messages possibly do not know the true value of a consistent brand story.

For the 34% of all respondents expressing significant confidence that their company is telling a consistent brand story, that confidence correlated with notable upside in terms of revenue, customer experience, and overall company health.

For example, 62% of those say that brand message consistency is worth $10MM or more per year. That is more than double the 29% of professionals who estimate the cost of dilution at $10MM or more. While the perceived cost seems bad enough, the reality of having an aligned story appears to be even better than anticipated[2].

The same positive trend is seen around the effect of a consistent brand message on the customer experience.

> Every respondent indicates consistency has a positive impact on the customer experience, with **improves customer engagement** (86%) and **improves customer satisfaction** (85%) selected the most frequently.

The benefits of internal alignment on the brand story extends beyond the bottom line and the customer experience to enhancing the workforce by building internal morale and loyalty. One respondent states, "It improves staff morale, connects employees with company's mission and fundamental values, also helps those who sell our services (products), by allowing them to have the comfort of working for a renowned company." While another notes, "it energizes people and increases morale. It also helps keep the work on strategy." Many share these sentiments.

> The key conclusion from this data is that those professionals that have experience with **a consistent brand story see tangible value that outpaces the perceived pain of those lacking consistency.** The companies who are struggling underestimate the benefits that come along with internal alignment around the brand.

2 Company size did not have a material impact on the estimated dollar value of internal consistency. Higher revenue companies ($1B+ revenue) did not make up a disproportionate percentage of the $10MM+ estimates

If you were to guess, what's the annual sales benefit to your company when people across your organization can tell your company's brand story accurately and consistently?

2%
Less than $1M

17%
$1M—$5M

19%
$6M—$10M

62%
More than $10M
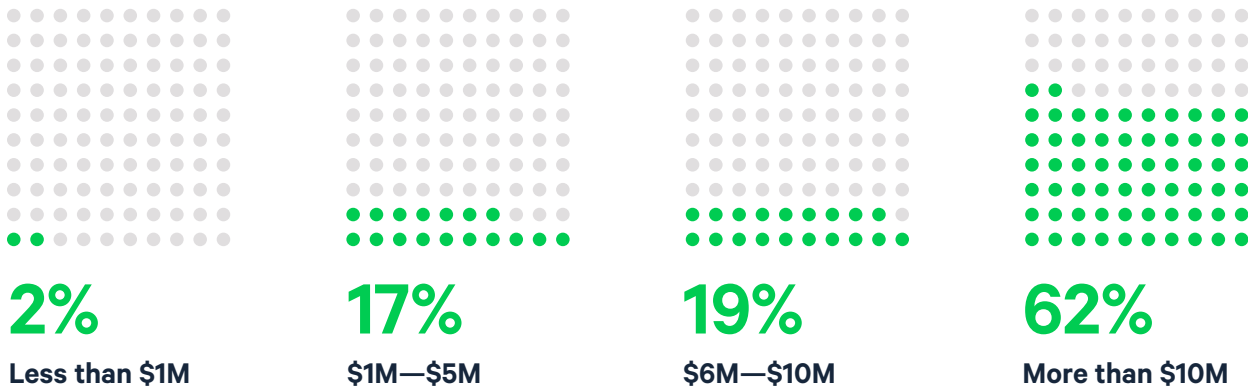
When people across your organization can properly tell your brand story, how does this affect the customer experience?

Improves customer engagement / lead generation

86%

Leads to customer satisfaction

85%

Leads customers to retention

72%

Increases sales

## 71%

No affect on customers

0%

The Culprit:
Why is Consistency so Hard?

It is easy to point to all the benefits of a consistent brand story. The challenge is understanding the root causes of the breakdown so marketers can close the gap and take advantage of the upside potential.

We asked the respondents for their views on "why" their company was struggling to achieve consistency. Three themes emerged from the verbatims—company size, a "siloed" operating structure and frequent changes in the marketing message.
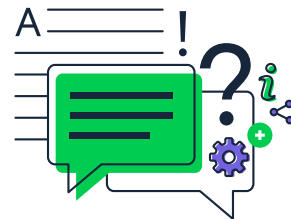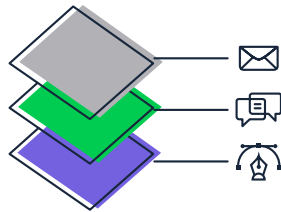
Company Size	Siloed Operating Structure	Frequent Changes to Marketing Message
"With 80,000+ employees it would be difficult to ensure everyone could clearly articulate."	"Our advertising area is completely separate from most operations and does not coordinate their messaging or campaigns with most of the organization."	"Our story is brand new. It's an evolving message. Employees can talk about products, but the brand story is a bit longer and harder."
"We are a large company, so it is hard to ensure absolute alignment on anything."	"Although Marketing has it figured out and is well versed, the rest of the company has a low adoption/awareness level of our brand story."	"The brand strategy has changed multiple times throughout the years but is starting to streamline. Each new brand strategy was communicated with a big launch, so the entire company knows - however, we have had many launches in the last six years."
"With our large workforce, in very different jobs, it might be difficult."	**"The company is a collection of divisions and acquisitions that are not centrally managed."**	**"We've had a shift in story over the past three years."**

Company Size

Companies with revenue $250MM–$1 Billion express slightly higher confidence in the consistency of the message throughout their organization than companies with revenue higher than $1 Billion, but not to a significant degree.

All respondents represent companies of $250MM or more of annual revenue, so it appears that scale at or beyond that threshold leads to complexities around message delivery and consistency. It stands to reason that larger companies will struggle with communication, but it is worth noting that if it is a problem for everyone, the companies who recognize and address the gaps have the opportunity to reclaim some lost value.

Siloed Operating Structure

There is some evidence in the study that message consistency is not transferring between departments. As we saw in the earlier section "The Dilution: The Story is Getting Lost in Translation", there are challenges with getting the message downstream to specific audiences.

While there is relatively high confidence in the consistency with Sales teams, there is a noteworthy drop off down the line to Customer Service, Dealers/Retailers, Distributors and Technical/Installation audiences. Despite these channels playing an important role in the go-to-market plan for companies, they often operate with a very different set of goals and metrics from Marketing. We conclude that the lack of messaging consistency with these channels is just as likely to be the result of not treating them as key brand contributors as it is about the organizational structure.

Frequent Changes to Marketing Message

When asked how often marketing introduces new initiatives—new products, new services, promotions, and branding campaigns—to their front-line teams, there is evidence suggesting that the marketing message may be frequently shifting for some companies. We delve into this more below.

52%
are introducing **new products** on a quarterly basis (82% annually)
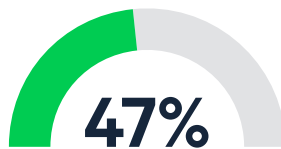
47%
are introducing **new services** on a quarterly basis (82% annually)
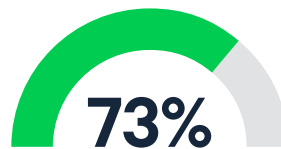
73%
are introducing **promotions** on a quarterly basis (86% annually)

29%
are introducing **branding or re-branding campaigns** on a quarterly basis (55% annually)

With product and service offerings changing for roughly half the responding companies on a quarterly basis, the front-line representatives are not even getting 90 days to get comfortable with it before they are asked to embrace another. Add promotions to the mix, and nearly three-quarters of the companies are changing their offer strategies each quarter. Price changes and promotions affect the value proposition, so this is another important variable to consider around message consistency. The pace of branding or re-branding campaigns is slower at 29% quarterly, but these also represent more foundational shifts. Changing or refreshing a brand position is a disruptive event, as seen in the comments.

When all factors are considered together, the essence of the brand story—product/service offering, price, and positioning—is changing to some degree on a quarterly basis for almost all the responding companies. This reality puts strain on the front-line teams and appears to be a significant barrier to adoption and alignment. However, as we will see in the next section, those companies with high confidence that their messaging is consistent throughout the organization employ several tactics to navigate these challenges successfully.

Achieving Consistency:
The Old Way Isn't Working

The challenge facing Marketers is transferring their story across large, siloed organizations and doing it with agility to account for the ever-evolving message. The obvious question is how? Another question is what role should Marketing teams play in improving consistency throughout their organizations.

To that question, we found that 71% are either "heavily involved" or "directly responsible" for getting the brand story out to the front-line teams. In addition, 80% of all respondents believe that the customer-facing representatives are critical to the success of new marketing initiatives and 80% also say the success of their role depends upon the ability of these teams to tell a consistent story. The connection here makes sense. Marketing and Product teams are doing consumer research and developing the strategy, but for their products, services or promotions to achieve commercial success, they need others to execute the plan. Marketing owns the message, and they will be judged on the results. Closing this gap should be a priority, especially given the costs and benefits detailed in a prior section.

So what tactics and strategies are the most successful companies using now to drive consistency and alignment with the front-line teams? Two key themes emerged: research and experiential techniques.

Understanding Their Customer Truth

Our findings show that the most successful companies employ extensive and ongoing customer research for driving brand consistency and alignment. Customer insights data is used not just to derive insight and shape the brand story, but to achieve collective "buy-in" across the organization. When the brand message is backed by actual customer experiences, people tend to pay attention to it. "Customer Research" in fact, leads our list as producing the most ROI for improving marketing and customer experience efforts. In the tables below we separate the companies that are successful at maintaining brand alignment from those that struggle. Customer research is especially valued at the companies at achieving brand alignment throughout their organization.

We discussed earlier that most companies do some form of customer research, but successful ones go the extra mile; they tie the research to brand/product messaging; they use multiple research approaches to get at the heart of how a customer thinks, acts, and feels. Not just surveys and focus groups, but successful brands go further with online qualitative research and in-depth interviews. Truly understanding the customer through the right research strengthens the brand story within the organization as they all become customer-centric rather than marketing-centric.

In short, customer research is a discriminating factor between companies reporting brand consistency and those that do not. For the former, **customer research is integral to their overall marketing strategy,** and it is done in a comprehensive and consistent manner.

Which of the following research methods do you use?

	Brand Alignment Top 2 Confidence	Brand Alignment Bottom 3 Confidence
Survey	84%	89%
Focus groups	62%	61%
In-depth interviews	51%	43%
Usability studies	35%	42%
Online diary, bulletin board or community	38%	20%
Ethnography or in-home/onsite research	25%	22%
Other qualitative methodology	34%	40%

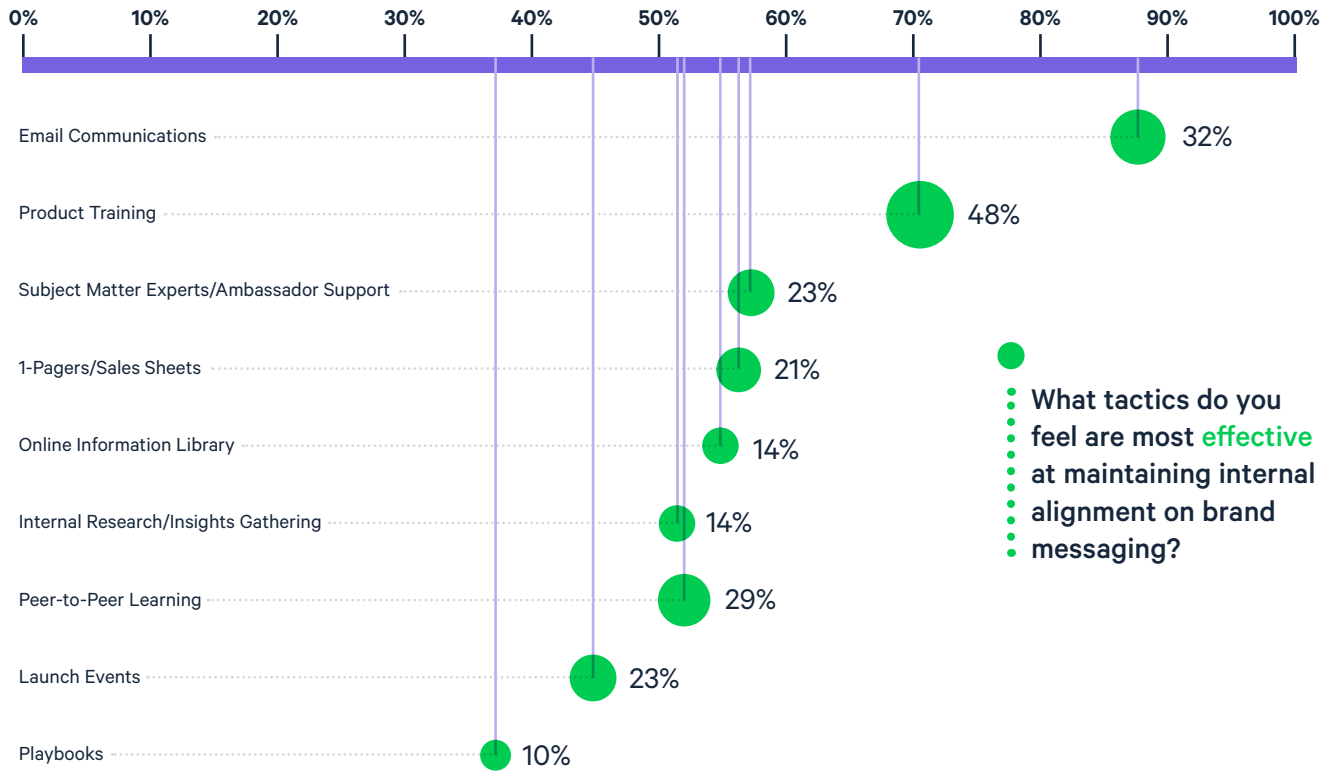**How much does your customer research inform your brand and product messaging?**

	Brand Alignment Top 2 Confidence	Brand Alignment Bottom 3 Confidence
Top 2	**73%**	**45%**
Every time	14%	4%
A lot	59%	41%
A moderate amount	19%	43%
Bottom 2	**8%**	**12%**
A little	8%	12%
Not at all	0%	0%
Mean	3.80	3.37

Engaging Employees with Experiential Learning

Beyond customer research, we also examined other marketing and organizational tactics used most frequently and the ones believed to be the most effective in gaining message consistency (see results):

How **frequently** does your company use the following tactics to mobilize customer-facing teams around new initiatives? '**Always / Often' Responded**

	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%

Email Communications — 32%

Product Training — 48%

Subject Matter Experts/Ambassador Support — 23%

1-Pagers/Sales Sheets — 21%

Online Information Library — 14%

Internal Research/Insights Gathering — 14%

Peer-to-Peer Learning — 29%

Launch Events — 23%

Playbooks — 10%

What tactics do you feel are most **effective** at maintaining internal alignment on brand messaging?

Here we see the same two tactics topping the list for both **"frequency"** and **"effectiveness"** —**Email Communications** and **Product Training**. Anyone who has worked in a corporate environment would agree that these sound like logical responses for the most frequent tactics. However, it is possible that the regularity around using those tactics is driving a bias around whether or not they are effective. If those are the most commonly used methods, and they are the most effective, why does the gap in message consistency exist? One may argue that this is a problem without an absolute solution. This is true, but when only 34% of respondents have confidence that people throughout their company can tell a consistent brand story, there is room for improvement. You have to wonder if the methods currently being used are partially responsible.

The data shows there are other tactics that appear to have a stronger link to message consistency. **Peer-to-Peer Learning, Launch Events,** and **Internal Research/Insights Gathering** have the largest gap between respondents with high confidence and those with moderate to no confidence in their company's message consistency. While **Email Communications** and **Product Training** might be the most prevalent, the data shows that these tactics are further down the list of ones that are moving the needle on message consistency.

Tactics Driving Message Consistency

	Brand Alignment Top 2 Confidence	Brand Alignment Bottom 3 Confidence	Gap (Top 2–Bot 3)
Launch Events	64%	27%	37%
Peer-to-Peer Learning	74%	38%	37%
Internal Research/Insights Gathering	71%	38%	33%
Product Training	85%	58%	27%
Playbooks	52%	26%	26%
Online Information Library	69%	44%	25%
Subject Matter Experts/Ambassador Support	65%	43%	22%
1-Pagers/Sales Sheets	66%	52%	14%
Email Communications	91%	79%	11%

Consider this data in the context of the problems we identified in the previous section—siloed organizations and a frequently changing marketing message. Which tactics seem best suited to combat these issues?

Peer-to-peer learning can be done on the fly, allowing front-line teams to be adapting in real time rather than waiting for another training or one sheet. This mechanism helps teams manage the pace of change with the messaging.

Similarly, launch events are an experiential tactic. Marketers have been increasing investments in experiential marketing as a way to connect brands and their customers (Intellitix, 2017) so it is not surprising that internal events have a similar effect on internal audiences.

Internal research/data gathering is perhaps one of the more powerful ways to collect insights and inform decision making. Understanding the different departments' perceptions and needs can help remove barriers or "silos" between teams and improve the flow of the brand message. The data collected from front-line teams can also provide great insight into the reaction's customers are having to the message. This can help marketers adjust and improve message effectiveness. Just as customer research is shown to drive confidence around message consistency, it stands to reason that doing similar research with internal audiences can improve alignment.

The connection between these three tactics is that they all involve a two-way flow of information, which helps build agility and responsiveness. Whereas email and product training are typically "push" tactics, these three highlighted strategies give the front-line audience a chance to interact with and experience the brand story.

> Marketers are having a dynamic conversation with customers, and **it appears that employing more dynamic tactics with customer-facing representatives is key** to aligning the internal and external view of the brand.

Tales from the Front Lines

Comments from respondents who work at companies that achieved brand alignment across their organization corroborate our conclusions.

Accomplishing brand alignment is a dynamic process that employees must participate and experience. Successful companies have a deep understanding and connection with their customer. They have undertaken research to understand their customer truth and create the brand strategy around it. Then there is the process of building the company culture that lives and breath the message. In the words of one respondent, "we spend significant resources, time, and money to understand and articulate this."

Customer Research

We're a 100+–year–old brand that does a lot of research to stay in touch with the consumer.

We have validated our results through multiple methods.

We do a ton of research to really understand things.

Lots of Communication

Many people across the organization have engagement with the new products going to market. Therefore, people across all tiers of the organization understand these products, their value, and how the public influence helped evolve them into what they are.

The company has extensively shared the brand story with employees through in-person workshops, intranet articles, and training.

We communicate it often. The brand and its messaging is preached company-wide at staff meetings and other meetings throughout the year.

It's Ingrained in the Company Culture

It's part of the culture - We have been around for over 100 years. It's part of everything we do.

We are all about customer service and customer experience, and that is something the company as a whole focuses on daily. So everyone should be able to explain that.

We spend significant resources, time, and money to understand and articulate this.

Conclusions

Brands are evolving quickly, and so is their messaging. At the same time, it is more important than ever that brands deliver a consistent brand story and brand experience to the customer. It is that experience—that live interaction with a company—that is shaping how consumers view a brand more than ever.

What happens if the person the customer is talking to does not have their story straight? What if the experience does not match the advertisement they saw? What if the brand promise does not match reality?

We learned in this study that 66% of Marketing, Customer Experience and Product Management professionals believe there is a gap between what customers hear through marketing and what they experience with their company. We learned that while the perceived costs of that misalignment are high, the estimated value of a consistent brand story is even higher, with nearly two-thirds of the respondents placing the value at greater than $10MM a year.

The challenge starts with establishing a cohesive and compelling brand narrative. Less than a third of companies we sampled state having "a clear understanding of our customers' needs and preferences through research," and only half say that customer research consistently informs their brand and product messaging. Without using extensive and ongoing research, it becomes guesswork on what customers value and what makes them connect to a brand. The companies who have a widespread understanding of the customer are more effective at rallying the company around the single story.

We also see that the speed of change and the complexity of these organizations is driving misalignment. Neither of those factors is likely to change for most consumer-focused brands, but improvement is imperative, both in terms of company performance and customer perception.

How can companies prevent their brand story from breaking down as it moves from department to department and eventually reaches a front-line associate standing in front of a customer?

Answering this requires framing the challenge differently. In their article, "How to Sell New Products," Thomas Steenburgh and Michael Ahearne highlight the struggles companies face when bringing new products or services to market (Harvard Business Review, 2018). The speed of introduction and the evolving capabilities of each new offering require agility that most companies and front-line teams do not possess. The "old way" of equipping teams is no longer
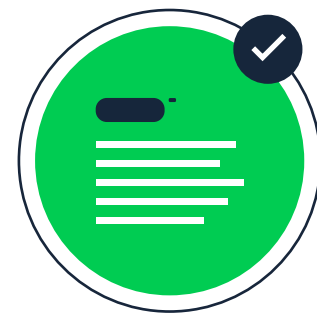
sufficient to achieve success. The training of the past does not enable people to tell a new story. The solution is not more training or better training. The opportunity is to look for something different than training altogether.
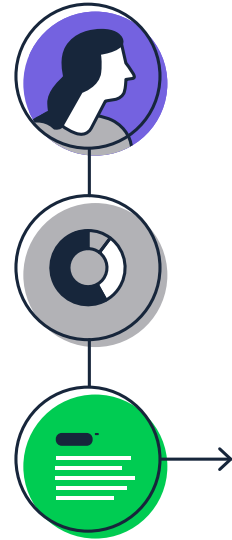
Our study supports their conclusions. While tactics like Product Training and Email Communications are used frequently and perceived to be effective, the data shows that a more dynamic set of engagement tactics, including Peer-to-Peer Learning, Launch Events, and Internal Research/Data Gathering are greater drivers of internal consistency around the brand story.

Our findings also demonstrate how critical it is to have customer research integrated into an overall marketing strategy. Successful brands spend a great deal of effort testing and gathering information on their buyer; who they are, what they value, and how they behave. Only with that understanding can a compelling brand narrative be shaped to connect with the customer and demonstrate lasting value as part of company culture or mission.

> Consistency around the brand message starts with **fully understanding your customer and engaging the people talking to the customers** in ways that can help them experience the brand for themselves.

All of these tactics taken together are, or lead to, something more experiential. They involve more two-way communication than training and email. They provide an opportunity to experience the brand story and adjust in real time. They help create an environment that is more adaptable, or to use Steenburgh and Ahearne's word, "resilient."

While these tactics are drivers of consistency for our respondents, they are in no way a complete list of ways companies can improve the delivery of their brand story. What they do highlight is where the opportunity for greater alignment exists. It is not in providing more of an outdated method. The opportunity is to see that companies are engaging customers in new and dynamic ways, and that consistency around the brand message starts with fully understanding your customer and engaging the people talking to the customers in ways that can help them experience the brand for themselves.

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