

# Building Sustainable Brands: The Brand Management Process



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**Gelb**  
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# Building Sustainable Brands: The Brand Management Process

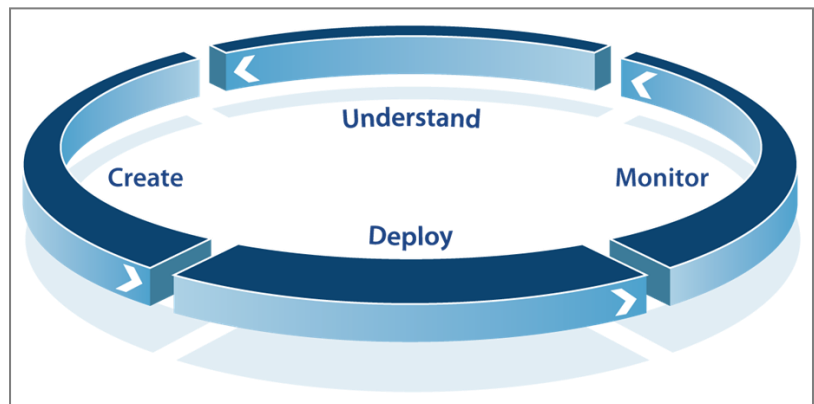
## Introduction

Your organization's brand represents a promise to employees, consumers and other stakeholders. More than just a logo or advertisement, your brand has the unique ability to unite all aspects of your organization and meaningfully differentiate you from competitors. Although perceptions of your brand are created in the marketplace, they can be effectively managed to drive growth by remaining true to the organization's capabilities, core values and heritage.

Gelb has a long history of working with healthcare organizations to create brand strategies that look beyond an annual initiative and demonstrate long-term effectiveness. Below we have outlined our brand process, which is organized into four stages: understand, create, deploy and monitor.

## Understand

Your foundation for success begins with an understanding of the objectives, how success will be measured, and who will make decisions. Lack of commitment from leadership is a common reason that healthcare brand strategies fail, so obtaining executive buy-in is also a crucial first step. You can learn more about how to begin the branding process with a solid foundation by reading our article, *Constructing a Better Brand*.



During this stage, a **brand team** should be developed. A brand team is a group that will play a critical role throughout the process – reviewing research findings, evaluating options, and ultimately making recommendations for change. Your brand team should engage cross-functional stakeholders throughout the organization. For example, if your brand includes multiple hospitals or centers, it is ideal to have at least one representative from each of them on the brand team. Members of the brand team begin to feel a sense of ownership in the process if they are engaged from the beginning planning process. This sense of ownership facilitates their advocacy throughout the process and in the period of brand change.

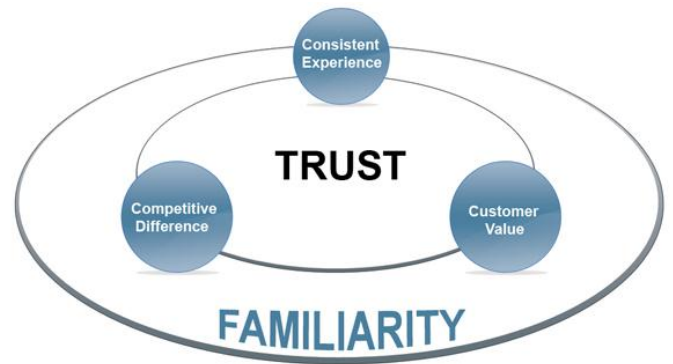
Your brand team should then define **success criteria**. When developing these criteria, keep in mind why the project was initiated and how it is expected to support the organization's business goals. To simulate discussion, you can discuss what each member of the brand team wants to get out of the project, what success looks like, and how results will be measured. Establishing success criteria is an important step, as they will be used to guide your brand team's decisions throughout the process.

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Before making any decisions or changes, a **brand audit** will give you a thorough understanding of your brand's current positioning. A brand audit involves delving into your current research and communications, as well as identifying gaps and conducting new research. Most likely, you already have research to give you insight on issues such as patient satisfaction, physician loyalty, and consumer preference. Analyzing this research will help you understand how your brand's goals compare with current performance and positioning.

At Gelb, we use our Brand Trust Model to organize these insights into key categories that establish how the brand creates value, differentiates itself from competitors, and delivers an exceptional experience. Below are examples of research that you can evaluate to provide insight about each of these areas.

1. **Customer Value:** Examines the criteria healthcare consumers use to choose among local hospitals an importance of each criterion. Also investigates drivers of overall preference. For example, consumers could be asked their level of agreement that you offer the latest medical technology, have a wide range of medical services, provide the best patient care, or have the best nurses.
2. **Consistent Experience:** Targets those who have used services at your hospital and examines overall satisfaction in areas such as communication with nurses or doctors, or responsiveness of hospital staff.
3. **Competitive Difference:** Evaluates the strength of associations consumers make with your brand and competing hospital brands, with questions focused on consumer awareness/preference, advertising recall, and current market share.
4. **Familiarity:** Measures overall awareness and knowledge, such as how many people have heard of or previously used your organization.



After reviewing and organizing your available research, it is likely that you will need to conduct additional marketing research (quantitative and qualitative). These efforts will help you fill information gaps needed to best create your brand strategy. It is risky to create a healthcare brand strategy without gathering data to show what motivates your stakeholders and drives their loyalty. It is also vital to develop an understanding of critical success factors for gaining buy-in from your internal audience.

The following tables outline examples of research that can be crucial to understanding your current brand positioning and developing prescriptions for growth.

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External Brand Audit	
Audience	Purpose
Community Leaders & Donors (Qualitative interviews or focus groups)	Review their experience with your organization and competitors, evaluate marketing effectiveness, opportunities for improvement, and prescriptions for growth
Referring Physicians (Qualitative interviews)	Determine satisfaction with current referral process, perception of your organization and competitors, opinions regarding current brand strategy, and recommendations for change
Consumers (Focus groups or online survey of primary and secondary service areas)	Examine current preferences, attitudes, satisfaction and ways to improve familiarity, customer value, experience and competitive difference

Internal Brand Audit	
Audience	Purpose
System and Program Leadership (Qualitative interviews)	Review consumer research; determine critical success factors and criteria for gaining buy-in
Employees (Focus groups or online survey)	Understand gaps between consumer research and employee perceptions; determine alignment with the organization's goals and willingness to adapt to organizational change

Also included in this phase should be a **messaging review** of your publicly-available marketing and communication materials. Examples of materials to review include advertising (print, online, TV, radio), social media, websites and patient education materials. If your brand has multiple names, logos or symbols, these materials should be organized and reviewed. The goal of reviewing these materials is to create an inventory of how the brand promise is expressed. By creating this inventory and understanding how your healthcare brand is being expressed, you can identify key messages and visual vocabulary, as well as identify any gaps in consistency, tone, keywords, etc.

### Create

During this stage, information that you have learned from your brand audit and messaging review should be synthesized into a presentation that will serve as a basis for a discussion with the brand team. Your brand team should be brought together in a **brand scenario workshop** devoted to analyzing the research and brainstorming new ideas. It is important to maintain a collaborative environment in which the team has freedom to suggest ideas, ask questions and develop agreement around decisions. A collaborative approach enables the team to take ownership of decisions and ultimately act as champions for the brand.

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Below are discussion topics for the workshop:

- Research Review
  - What were the key takeaways from the research?
  - How is the brand perceived today?
  - What are the opportunities for the brand?
  - In what areas have we been the most successful?
- Business Strategy
  - What guidance is provided by your business strategy?
  - How do your visions/mission/values align with your strategic priorities?
  - How do we reflect the brand through interactions with our customers and stakeholders?
- Possibilities
  - Who are we today? (current strengths, weaknesses, perceptions)
  - What should we be in the future?
  - How will we measure success?

Using insights and ideas from these discussions, brand scenarios can be created after the workshop is completed. Each scenario should include visual metaphors, a value proposition and positioning statement, service standards, the brand promise, and key messages. After the scenarios have been completed, the brand team comes together again for **brand scenario evaluation**. To provide a framework for the discussions, the scenarios should be evaluated based on the success criteria that your brand team outlined at the beginning stage of this process.

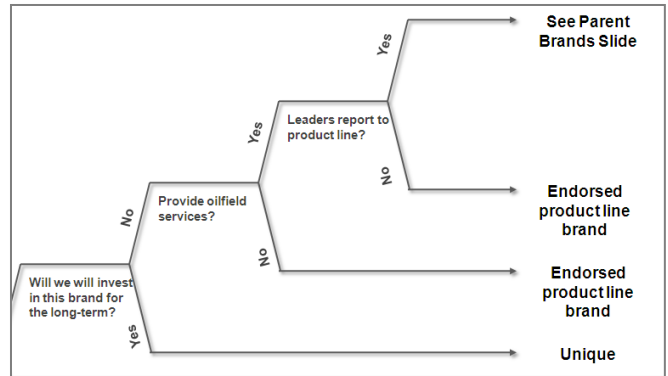
Below is an example of a spreadsheet for scenario evaluation.

Criteria	Low Performance	Moderate Performance	High Performance
Supports mission			
Believable			
Memorable			
Focus on customer needs			
Focus on business benefits			
Consistent messages			
Consistent images			
Recognizes current perceptions			

Once a brand has been chosen, documents can be created to guide decisions regarding the brand and to communicate brand standards. The following paragraphs and images describe these guiding documents.

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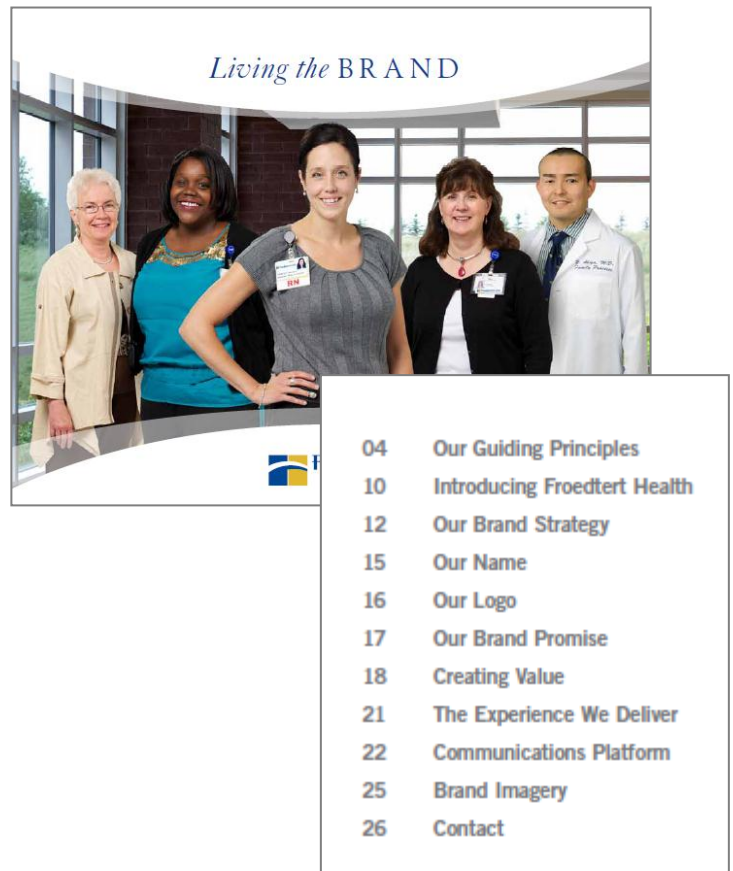
**Brand Architecture:** This will guide decisions regarding entities of the organization that could benefit from the brand. This is particularly important if your organization has multiple facilities or partnerships, as it establishes the differences among current brands. This image (right) outlines the structure of a Brand Architecture.



**Message Map:** This will guide future communications from the master brand and any affiliated brands. Based on collective thinking from the brand team, you will outline how the brand is perceived today, how you want it to be perceived in the future, and how you will convince them. This includes attitudes to overcome, attitudes to reinforce, differentiating messages, reasons to believe and how to leave a lasting impression. The image to the right outlines the contents of a Message Map.



**The Brand Book:** This document provides guidance for marketing communication and executives. It is used as a guide to stakeholders in developing external and internal communications. Included should be your brand definition, reasons for change, how decisions were made, current perceptions, value proposition, positioning statement, service standards, brand promise, expectation of staff, and success measures. It should also be used as an opportunity to empower your stakeholders to become brand advocates who understand their role in bringing the brand to life and buy into the strategy.



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## Deploy

Near the completion of the previous stage, a detailed timeline should be created for deploying the new brand strategy to employees and consumers. This is an important opportunity to communicate about your brand to your target audiences. Deployment will typically last between three and six months, depending on your needs, and includes:

- Strategic and tactical planning
- Defining success criteria and establishing benchmarks
- Developing training materials, web site content or sales collateral
- Determining the ideal customer experience (you can do this by using a qualitative research process called Experience Mapping, which engages consumers in in-depth interviews to understand their current and ideal experiences. You can learn more about Experience Mapping by reading our article, *Experience Mapping – Growing by Understanding*)

An important part of deployment is an internal launch that promotes understanding of the brand and how employees should enact the brand in their everyday behaviors. When employees feel included in the process and responsible for participating, they are more likely to buy into the changes. Sustaining long-term momentum will require routine communication that supports the brand and a commitment from management to make decisions with the brand in mind. Therefore, be careful to avoid the all-too-common mistake of thinking brand-related communication is minimally important after this stage has been completed.

Below is a list of resources for deploying the brand to employees and customers.

Employees	Customers
<ul style="list-style-type: none"><li>• Brand book</li><li>• CEO letter</li><li>• Launch video</li><li>• Business cards/stationery</li><li>• Intranet</li><li>• Proposal/folders/collateral</li><li>• On-site brand visits</li><li>• PowerPoint template</li><li>• Worksite posters</li><li>• Building signage</li></ul>	<ul style="list-style-type: none"><li>• Questions/answers document</li><li>• Video</li><li>• CEO letter</li><li>• Brochure</li><li>• Tradeshow exhibits</li><li>• Print advertising</li><li>• Website</li></ul>

## Monitor

Transforming branding initiatives to long-term cultural changes requires holding your organization accountable for results. Regular communication about the brand and setting expectations about how the brand will be protected through everyday decisions and service standards is of utmost importance. Some organizations create brand experience training programs that all new and current employees must complete. Experience training workshops

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should include personal action plans in which employees develop specific goals for enacting the brand promise. Management then uses these personal action plans during employee evaluations. Or, action plans can be developed as a team and regularly referred to in team meetings. In this way, the promise of the brand is regularly talked about and monitored internally (for more information about this, read our white paper *Developing a Customer Focused Culture with Experience Mapping Workshops*).

A particularly effective way to quantitatively monitor the brand is through online dashboards. They allow you to monitor employee alignment, customer satisfaction and touchpoint performance. Dashboard systems are hosted online, so they can be accessed anywhere, anytime. Most importantly, situations that may place the organization's relationships "at-risk" are escalated for service recovery. Below are activities that can be measured through a dashboard.



1. **Customer Experience Dashboard:** Continuously monitors the customer experience and escalates at-risk issues via email. Our experience dashboard efficiently distributes information in real time for internal benchmarking and online reporting.
2. **Touchpoint Performance Dashboard:** Our touchpoint performance dashboard using standard measures to test each new and existing touchpoint. This dashboard distributes information in real time to identify best practices and cost-effectively test new advertising (including TV and radio) before launch.
3. **Organizational Excellence Dashboard:** Monitors employee commitment to the organization, prevailing attitudes and alignment with corporate goals. This tool is also used to monitor satisfaction with support functions within your enterprise.

You can learn more about dashboards by reading our article, *Action Marketing: Patient Experience Dashboards*.

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## About Endeavor

Endeavor Management, is an international management consulting firm that collaboratively works with their clients to achieve greater value from their transformational business initiatives. Endeavor serves as a catalyst by providing pragmatic methodologies and industry expertise in Transformational Strategies, Operational Excellence, Organizational Effectiveness, and Transformational Leadership.

Our clients include those responsible for:

- Business Strategy
- Marketing and Brand Strategy
- Operations
- Technology Deployment
- Strategic Human Capital
- Corporate Finance

The firm's 40 year heritage has produced a substantial portfolio of proven methodologies, deep operational insight and broad industry experience. This experience enables our team to quickly understand the dynamics of client companies and markets. Endeavor's clients span the globe and are typically leaders in their industry.

Gelb Consulting Group, a wholly owned subsidiary, monitors organizational performance and designs winning marketing strategies. Gelb helps organizations focus their marketing initiatives by fully understanding customer needs through proven strategic frameworks to guide marketing strategies, build trusted brands, deliver exceptional experiences and launch new products.

Our websites:

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