



Guide: Prioritizing Staged Experiences

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Part 1: Overview

Creating ideas for staged experiences is the easy part. Determining which ones will have the most profound impact on the profitability of your company and determining how to effectively and efficiently implement them are the most daunting tasks.

The purpose of this guide is to:

1. Provide a framework for innovating (brainstorming) potential staged experiences for your company and identifying experiences that are 100 percent in alignment with both the Brand Lens concepts that you want your company to be known for and the growth goals and objectives your company is working to achieve.
2. Provide a methodical approach for evaluating which staged experiences make the most logical and economical sense to invest resources in for implementation. Not all staged experiences carry equal weight. Some will delight employees and lead to greater productivity, which will lead to cost-savings and increased profit. Some will delight customers, leading to greater loyalty and new sales. Some simply won't have the same impact as others. Filtering through the many ideas is a critical step to ensure that the staged experiences put into your company's brand strategy are profit-focused experiences.
3. Provide a simple approach for action planning and establishing accountability for implementing staged experiences. Many staged experiences are easy to do and, thus, require little investment of people-time or money. Others are more complex and require detailed plans and employee ownership of action items in order to ensure successful implementation.

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Part 2: Creating New Staged Experiences Using Touchpoints and Opportunity Questions

Step 1: Build a Customer Touchpoint Experience Wheel

An initial step to getting your team ready to create staged experiences is to enable them to think about the key points of interaction with customers where experiences can be delivered. The approach below is presented from the perspective of creating customer touchpoints and staged experiences. Please note that the same process should be used for uncovering touchpoints and staged experiences for employees.

1. Start by sharing the Touchpoint Experience Wheel template (below) with a few employees in your company. Have them fill in as many touchpoints as they can identify or brainstorm.

Truth 6 of the *Achieve Brand Integrity* book has more information about the Touchpoint Experience Wheel. And you can find some examples of touchpoints on pages 111 through 114. Use these examples to help explain to your team what a touchpoint is.

2. Come together to review the results of each person's efforts.
 - Gain consensus from participants on the touchpoints that could have the greatest impact for delivering branded staged experiences. Indicate them as high impact touchpoints.

Customer Touchpoint Experience Wheel Template

A touchpoint represents any point of interaction that a company has with a target customer or an employee. Touchpoints are opportunities that the company can deliver its brand.

Use the following template to identify customer touchpoints throughout the four quadrants of the customer lifecycle: Pre-purchase, Purchase, Post-purchase, and Relationship Building. For an employee touchpoint wheel, change the name of the quadrants to: Pre-hire, Hire, Post Hire, and Ongoing Employee Relations.





Pre-purchase touchpoints	Purchase touchpoints	Post-purchase touchpoints	Relationship building touchpoints
1.	1.	1.	1.
2.	2.	2.	2.
3.	3.	3.	3.

Step 2: Build Opportunity Questions

Opportunity questions are thought-provoking questions written focused on a Brand Lens and an important customer touchpoint in mind. The purpose of a good opportunity question is to assist respondents in thinking about staged experience ideas that will drive key business results (operational and employee productivity, employee and customer loyalty, and new sales).

1. Pick a high impact touchpoint identified in Step 1.
2. Choose the Brand Lens concept that you think will most effectively drive an experience at that touchpoint.
3. Review the Brand Lens concept overview (beliefs, benefits, and behaviors) and pick one or two descriptions to use to generate an opportunity question.

Note: If you have not yet defined a Brand Lens operationally for your company, please refer to Truth 6 of the *Achieve Brand Integrity* book (pages 99 through 106 and 116 to 117) and download the Guide to Building and Operationally Defining a Brand Lens at www.brandintegrity.com/truth6.

4. Write an opportunity question that matches the touchpoint with a Brand Lens concept. Opportunity questions are open-ended “how-to” inquiries. For instance, “How can we...” or, “In what ways might we ...?”
 - Here is an example for a retail jewelry store:
 - The Brand Concept = The Jewelry Experience
 - > The following is a statement describing the meaning of the Brand Lens concept: “Delighting customers with a consistent welcome.”
 - The customer touchpoint = The Customer Greeting
 - **Potential opportunity questions:**
 - > In what ways might the security guard *deliver a comfortable and welcoming environment* for customers?
 - > How could salespeople *provide a consistent experience* in the way customers are greeted, leading to less intimidation and greater loyalty?
 - Note: the words in italics came right from the Brand Lens concept overview description.
5. Do the same thing for each Brand Lens concept. Create a few opportunity questions based on the touchpoints identified in Step 1.

Gather a team of employees and form two groups. Send each group a set of approximately six questions. (This is done to make sure each Brand Lens concept receives an equal amount of attention and to



prevent an overload of experiences to tackle when aggregating and spinning results.) Below are some things to consider when distributing opportunity questions.

Brainstorming Staged Experiences from Opportunity Questions

In the brainstorming exercise, a team of employees will be creating ideas for staged experiences. For the purpose of this exercise consider an “idea” to be anything that helps demonstrate/prove a company Brand Lens concept through the delivery of an experience for the target audience (employees or customers).

Below are items to consider when brainstorming ideas for staged experiences:

- Review the operational definition for each Brand Lens concept (beliefs, benefits, and behaviors).
- Don't worry about your grammar or spelling. Ensure participants provide enough depth so that the idea can be understood.
- Don't judge ideas too soon: To effectively brainstorm, many ideas should be collected without judgment. The time will soon come for deleting ideas that will not add value to the company.

The initial task of brainstorming ideas should be done individually or in small groups of three or fewer.

After conducting the exercise, collect everyone's work and spin the results to combine similar ideas and develop concise staged experiences to evaluate and prioritize (in Part 3).



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Part 3: Evaluating and Prioritizing New Staged Experiences

After aggregating ideas for staged experiences, evaluate and prioritize them in order to focus on a specific few for implementation.

1. Determine a prioritization team consisting of a few leaders in your company.
2. Schedule a review meeting (to conduct after the prioritization in order to go over the final list and assign due dates to each pre-work step).

Step 1: The First Review (Gut-Feel Vote)

1. Create a list of staged experiences in a table similar to the example below. For each experience determine:
 - What is the brand driver¹ (or drivers) for the experience?
 - Should the experience be considered low hanging fruit²?
 - Will the experience enable employees to buy in³ to the brand strategy of the company?
 - Does the experience “feel” right? Each participant should determine their own “gut feel” of whether or not they like the overall experience.

Explain to participants that, at this point, they should not to worry about how hard the staged experience will be to implement. Everyone should select ideas that they believe are powerful and will have a strong impact on delivering the company brand, leading to increased profits.

Staged Experience Prioritization Gut-Feel Vote	Brand Driver	Low Hanging Fruit	Buy-in	Gut Feel
Brand Lens Concepts:				
1. Staged Experience Idea				
2. Staged Experience Idea				
3. Staged Experience Idea				

¹ Brand driver: The Brand Lens concept(s) that the experience has the greatest impact on.
² Low hanging fruit: Staged experience ideas that require less people-time and financial commitment (“just-do-its”).
³ Buy-in: A staged experience that leads to employee buy-in is one that helps employees understand the brand strategy and enables them to show commitment through their actions.



Step 2: Gaining Consensus

1. Once you have each participant's top ideas, come together and review the staged experiences each participant selected as "gut-feel" favorites.
 - As a group, gain consensus and highlight the top experiences that you believe should be of high priority to the company.
 - When selecting top experiences as a group, please be sure to choose a productive amount of low hanging fruit and actionable initiative⁴ experiences.
2. Aggregate the top experiences that were agreed upon and consolidate them in one document for prioritization. A sample template that can be used is pictured after the next step.

Step 3: Prioritizing Top Experiences

1. Create a list of the top experiences selected in Step 2 to send to your leaders for further prioritization. The list should include:
 - The brand driver(s) identified for each experience.
 - Any low hanging fruit or employee buy-in experiences.
 - Impact Criteria: This is where you mark the impact that each experience will have on the key result areas of the company. These criteria are ranked on a scale of 1 to 5 where 1 is low and 5 is high. Some sample criteria to rank per experience include:
 - > Increase Revenue and/or Decrease Cost
 - Will this experience help the company increase revenue or decrease costs?
 - > New Customer Acquisition
 - How much of an impact will this experience have in driving sales and/or reaching new customers?
 - > Employee Loyalty and/or Productivity
 - Will this experience have an influence on employee loyalty and/or productivity?
 - > Customer Loyalty
 - Will this experience have a positive impact on customer loyalty?
 - > Measurable
 - Can the company easily measure the success of this experience (through revenue generated, satisfaction feedback, etc.)?
 - Resource Criteria: This is where you mark the impact that each experience will have on company resources. These criteria are ranked on a scale of 1 to 5 where 1 is high and 5 is low. Reversing the ranking scale here enables the total score to reflect the optimal experiences to consider for implementation. Some sample criteria to consider when ranking include:
 - > People Time
 - How much employee time will have to be dedicated to developing and doing this experience consistently?

⁴ Actionable initiative: Staged experience ideas that require a greater investment of time and money and an organized process in order to ensure consistent execution.



- > Financial Commitment
 - How much financial resources are required to consistently do this experience?
- 2. Have each leader complete the prioritization matrix by scoring each of the staged experiences based on the criteria provided. Then come together as a team and average the results.
 - The scoring of experiences is not a perfect science, so don't get caught up in trying to get everyone to agree on the exact score for each set of criteria. Briefly talk through each experience and take the group's average score for each experience. Feel free to use fractional amounts where applicable.
- 3. Based on the priority ranking, you will now have your top 5-10 low hanging fruit and top 2-3 actionable initiatives for implementation in the coming 6-12 months.

Sample template

Staged Experience Criteria & Priority Matrix				Impact Criteria					Resource Criteria		Total Score
				1 = Low; 3 = Medium; 5 = High					1 = High; 3 = Medium; 5 = Low		
Brand Lens Concepts:				Buy-in	Increase Revenue and/or Decrease Cost	New Customer Acquisition	Employee Loyalty and/or Productivity	Customer Loyalty	Measurable	People-time	Financial Commitment
1. Staged Experience Idea											
2. Staged Experience Idea											
3. Staged Experience Idea											



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Part 4: Implementing Staged Experiences

A team-based approach to managing execution of experiences has proven to work best. Amazingly, actions get done more effectively when names and dates are attached!

Form teams for implementation

- For each experience, form small teams of two to three employees from throughout the company who will be responsible for ensuring the experience is implemented.
 - > For some experiences, you may only need one person to implement the experience.
- In addition, assign ownership (an “Experience Leader”) and timing for the implementation of each experience. Below is a simple table that can be used for managing the implementation of each experience.

Staged Experience Implementation Tracking

Staged Experience Description	Leader	Team	Status Update	Due Date
1.				
2.				
3.				
4.				



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Part 5: Planning Experiences and Actions

Below you will find a suggested framework for planning an initiative such as a staged experience. For multi-step and more complex actionable initiatives, you should plan to complete a planning process in order to further define and understand how to implement the staged experience.

Ideas into Action™ Planning Framework

1. The Objective

What is the objective of the staged experience and why should our company implement it?

Time is spent uncovering the true “purpose” and need for the staged experience. The staged experience should be defined clearly and a targeted direction as to its impact on the company should be provided.

2. Action Steps (Macro Level)

What are the key steps and in what order should they happen?

Conduct a focused brainstorming session to identify all the potential steps that will be necessary to implement the objective.

3. Tasks (Micro Level)

What are the more detailed tasks required to achieve the action steps?

Further document the details of each action step to ensure clarity and success.

Note: It is often easier to brainstorm as many steps and tasks as you can and then divide them into action steps and associated tasks.

4. Timing

When will the action step or task be completed and does it have a hard deadline or process flow timing?

5. Ownership

Who owns management/execution of the experience and each associated action step?

6. Communications Plan

Who / To Whom / How / By When

Create a detailed communication flow chart that plans out specifics on how to ensure effective communications to enhance the execution of the staged experience.

The following offers a sample template for capturing Action Planning steps and assigning ownership.



The Objective:		
Today's Date:	Target Objective Completion Date:	
Action Steps and Tasks	Owner	Timing
1.		
•		
2.		
•		
3.		
•		
4.		
•		
5.		
•		
6.		
•		
7.		
•		
8.		