

BETWEEN THE LINES

TAPPING THE POTENTIAL OF
21ST CENTURY DOCUMENTS

by John M. Kelly

Sweating the Details of the Brand

Any company can make a brand promise. But only the best companies keep them.

Most enterprises do an admirable job of initially presenting themselves to their prospects. Their brand message is expressed in an interesting way; their brand image is set up well. But the brands that endure do something more—they maintain consistent, high standards throughout the customer life cycle, sweating the details at every customer touchpoint.

Effective branding is a precise and mindful endeavor that you can't fake. It's apparent in every document and at every stage of the customer experience, including pre-sales, sales, onboarding and up-selling. When you do it well, you gain a competitive advantage—customers pay more simply because of the brand.

When a brand is deeply thoughtful and carefully engineered, it provides rich, tangible value. That's the upside. The downside? If you don't manage the details of your brand well, the brand itself can be destroyed. Smart document management helps ensure that doesn't happen.

The Power of Effective Branding

There's no doubt that branding is a hot topic in offices around the world. Amazon.com has more than 2,500 brand-related books. A Google search on "brand building" turns up 8.6 million hits in a fraction of a second.

But what exactly is a brand and how do documents help build it?

To answer the first half of the question, let's consult the most popular brand in online encyclopedias. According to Wikipedia, a brand is "a name, sign, symbol, slogan or anything that is used to identify and distinguish a specific product, service or business."

Renowned marketing guru Seth Godin offers his own spin:

A brand is the set of expectations, memories, stories and relationships that, taken together, account for a consumer's decision to choose one product or service over another. If the consumer (whether it's a business, a buyer, a voter or a donor) doesn't pay a premium, make a selection or spread the word, then no brand value exists for that consumer.¹

Inherent in Godin's description is the message that a brand is not a logo or a product or a website alone. It's a dynamic combination of all those elements, plus many others, including documents, organizational culture and customer interactions.

More than just a recognizable flag to wave at the world, your brand directly or indirectly leads to revenue growth—or decline—because it elicits a response from your consumers. It's your job to make sure the response is favorable.

The executive director of the Brand Institute at Emory University, Rajendra Srivastata, puts it this way: "A brand really lies between the two ears of the consumer. The company owns the physical brand, of course. But the value of the brand really is what it means to the consumer."

The Struggle to Quantify Brand Value

In the winter of 2010, the Credit Suisse Research Institute released a report on the "Great Brands of Tomorrow." The study concluded that "companies that focus on brand-building consistently generate outsize, long-term growth, profitability and return."²

As *Forbes* writer Allen Adamson noted, the report was a milestone of sorts. It indicated that the investment community was finally recognizing the bottom-line importance of a hard-to-quantify asset: a brand.

Not that the concept is new. For years, business professors and branding agencies have pondered the financial value of leading brands. Some have concocted complex Einsteinian calculations. Others advocate a simple equation: Market capitalization minus tangible book value equals brand value.

For instance, before the recent recession, the market value of Harley Davidson was calculated at more than 100 times its book value. And the brand value of Coca-Cola, perhaps the world's most widely recognized product name, has been estimated to be worth approximately \$67 billion.³

Another often-cited reference is the Phillip Morris purchase of Kraft in 1988. Kraft's price tag was close to six times the company's apparent worth based on concrete assets like inventory, buildings and equipment. Why the phenomenal markup? The famous Kraft brand.

It's no wonder that the world's largest brand consultancy, Interbrand, likes to quote John Stuart, an early Quaker Oats CEO, who said, "If this business were split up, I would give you the land and bricks and mortar, and I would take the brands and trade marks and I would fare better than you."⁴

Ensuring Consistency at Every Touchpoint

As the preceding examples illustrate, your brand is one of your most valuable assets in the modern business world. However, brand value is not constant. And not every organization manages its brand well.

A quick glance at Interbrand's annual list of the *100 Best Global Brands* drives home the point. In 2010, 10 companies made the list for the first time. That means 10 other well-known companies were eliminated. Even organizations that remain on the list can see their brand value swiftly evaporate. In the 2009 list, one financial services company was estimated to have lost 50 percent of its brand value in a single year.⁵

Clearly, brand value is a volatile substance. Like mercury in a thermometer, it can go up or down in a hurry. That's why it needs to be carefully developed, nurtured, managed and maintained. One way to do this is to drive clarity and consistency through all your customer touchpoints, reinforcing the value to your customers in a way that's uniquely you. Writer Ted Matthews expressed the point concisely in a post on *Canadian Business Online*:

Your company's brand is what people think of you, and that's shaped by every interaction you have with your market. It is therefore crucial to ensure that every touchpoint with your company is consistent, that you present a clear and unvarying sense of what you're all about.⁶

The touchpoints Matthews references are the key building blocks of customer relationships. They represent every personal, print and digital interaction you have with your customers in and across channels. They may be traditional interactions—such as sales calls—or Web 2.0 connections, like a Twitter blast or a mobile marketing campaign. The smart use of touchpoints is the difference between a winning brand and an also-ran.

Many companies are masters at this. They range from major multinational corporations like Disney to niche companies like Burt's Bees personal care products.

Another good example is the famed insurance company Lloyds Banking Group, better known as Lloyds of London. For centuries, Lloyds has managed to maintain a consistent, high-quality image—a single, strong brand that endures today, even with 16 million customers, 90,000 employees and 2,000 locations across 27 countries.

A portion of Lloyds' image stems from the unusual insurance policies the firm has written, such as those for Tina Turner's legs and Keith Richards' fingers. However, since its 17th century founding as a provider of marine insurance, the company has sweated the details of its brand, establishing itself as the premier provider of specialist insurance.

In fact, Lloyds is such a proponent of brand value that its website has an entire section devoted to the importance of the Lloyds brand. Here's just a sampling:

We are all responsible for bringing our brand idea to life by ensuring that it is reflected in everything we say and do during the working day. We all have a part to play ... the [brand] has to be implemented across the entire range of our communications, including our website, intranet publications, newsletters, stationery, business cards, PowerPoint presentations, events, merchandise and media relations.

And by "brand" Lloyds doesn't mean exclusively "look and feel." They're also talking about their clearly articulated values: an appetite for risk, expertise and intuition, agility and dependability. In short, a brand personality they describe as "confidence and flair."

One way Lloyds meets its branding goals is through a full range of outsourced document services. Working with Xerox, Lloyds reinforces the power and consistency of its long-standing brand through unified creative services, document production and publishing, transaction document printing, warehousing, imaging and e-print sourcing.

Xerox is comparably vigilant about its brand. In fact, we faced our own brand issues when we transitioned from a copier/printer company to a services partner who helps manage information. Brand clarity and consistency were key. So were customer needs.

Even a detail like our logo graphic was thoughtfully created to ensure meaning. The sphere provides a sense of "global" and "movement" while the lowercase "x" represents our connections to customers, partners, industry and innovation. Ultimately, our customers inform all aspects of our brand. As Xerox CMO Christa Carone aptly put it, "Our message is more powerful when spoken through our customers."

Avoiding the Disconnect between Up-Front and Follow-Up

Why is document consistency so vital to a brand? Because documents—in all forms—act as brand ambassadors. They are special diplomatic representatives of your enterprise, interacting with customers at every stage of a relationship:

They generate awareness. They help acquire new customers. They facilitate onboarding. They maintain and deepen connections. And they provide essential information and guidance about the products and services that led to your customer relationships in the first place.

It's important to use your ambassadors wisely, maximizing their impact and value in all prospect and customer communications. And the most important word in the preceding sentence is "all."

Enrollment forms. New account information packets. Benefits statements. Bills and invoices. Policy changes and updates. Loyalty programs. User guides. Cross-selling and up-selling communications. Email notifications and alerts. Mobile phone messages. And so on.

For instance, one year after one of my colleagues bought a new car, the manufacturer sent her an anniversary gift—an elegantly packaged pen with a thank-you note. She’s a customer of that car company for life because they used a direct-mail touchpoint cleverly (and she loves the car).

Regardless of the touchpoint’s form, it affects a customer’s perception of your brand. Even something as simple as product packaging sends a direct message about who you are. Just ask any gift recipient whose face has brightened at the sight of an unmistakable blue box from a certain high-end jewelry store. Brand masters like Tiffany recognize that in the eyes of their customers, the package is the company.

Microsoft is equally savvy. There isn’t a PC user in the world who doesn’t recognize the Windows four-pane landmark. In fact, we worked with a Microsoft production partner, Mediaware Digital Ltd. in Dublin, to help ensure consistency in Windows 7 packaging. As Mediaware printed multilingual Windows boxes on demand, it was essential to maintain Microsoft’s brand identity across all languages.

Yet as critical as these communications may be, many companies suffer from a disconnect between “follow-up” touchpoints and the “up-front” image presented in ad campaigns, social media and other high-profile marketing programs. This inconsistency can undermine a brand by raising questions about its authenticity.

Think of it this way. A sophisticated, energetic sales rep in a crisp Armani suit walks in your door. He is completely engaging and expresses genuine concern for your best interests. He listens to you. He tells you how important you are to his company. And he offers a product or service that seems like a perfect fit. You sign on the dotted line, feeling confident and happy as the rep walks away.

The next day, a second company rep arrives. His hair is uncombed. His beard hasn’t seen a razor in days. And his splattered overalls are more thrift store than Armani. He halfheartedly installs your new product or service, finishing with a curt, “Sorry, that’s the best I can do.” When you protest, he replies, “We have a million customers. I’m not really worried about you.”

As the rep shuffles toward his battered van, your perception of the company heads south in a hurry. A simplified analogy, I admit. Yet this is the split personality many companies project when they fail to maintain brand consistency throughout their customer communications.

Keeping the Pink Panther on the Prowl

Owens Corning is a perfect example of a business that understands the importance of consistent branding.

For almost 30 years, the company has used the iconic Pink Panther character as its official brand spokesperson. The coral cartoon cat can be found spinning a globe on the website home page or peering out from a performance warranty or clutching a pawful of money on a tax credit form.

Chosen to reflect the color of the company's insulation products (dyed pink for visual contrast), the Pink Panther has come to mean Owens Corning in the consumer's mind. Even the company's phone number, 1-800-GET-PINK, reinforces the brand identity (not to mention the company's trademark on the word PINK).

So when Owens Corning made a sizable acquisition that increased employees outside the United States by 50 percent, they were concerned about potential inconsistencies and inefficiencies among their documents. A valid concern since the document pile included thousands of technical publications, HR and marketing materials, and other business communication. To ensure that no one led the beloved panther down the wrong path, the company implemented a fully integrated global document management system.

The solution included four key components:

- Centralized print production and fulfillment services that helped Owens Corning maintain consistency and achieve 100 percent on-time delivery
- An end-to-end Lean Six Sigma Document Production analysis of the document supply chain, which uncovered areas for process improvement
- Content management and translation services across a wide variety of global publications
- Digital Print-on-Demand (POD) capabilities for producing high quality documents in smaller, cost-effective quantities

Today, whether consumers are looking at documents that bear the Pink Panther, le Panthère Rose or de Roze Panter, the brand that comes through is still unmistakably Owens Corning.

Getting on Board with Onboarding

One often overlooked touchpoint in the communications process is onboarding—the stage where a company acquires a new customer or partner. According to an independent April Forrester Report: “Customer onboarding lags behind other business processes in both the quality of the customer experience and costs.

The poor state of customer onboarding results in customers abandoning the application process, loss of customers, regulatory fines and damage to the corporate brand.”⁷

Yet onboarding represents an all-important customer touchpoint. It welcomes a “stranger” to your organization and provides a glimpse of what’s ahead. Some visionary companies are preventing customers from falling through the onboarding cracks by making sure the cracks never form. Using tools like Enterprise Content Management (ECM), communication engineering and centralized document production, these prudent enterprises are leveraging onboarding to reinforce brand affinity.

For example, they’re producing highly personalized welcome kits and prepopulating forms with information customers have already provided. This immediately sends two messages: we know who you are and we’ll make life easy for you.

The need to capitalize on onboarding documents will only intensify as customer interactions continue to evolve from face-to-face to face-to-screen. Commoditized processes are being automated with greater frequency and mandates around “wet” signatures are changing. Effective onboarding can infuse your initial customer touchpoints with simplicity and even warmth, building better relationships right from the start.

Apple: Branding’s iGenius

It is almost impossible to discuss brands without mentioning Apple. Just about every branding expert sings the praises of this innovative leader.

“It’s a really powerful brand,” wrote Robin Rusch, editor of Brandchannel.com. “The overwhelming presence of Apple comes through in everything they do.”⁸

Creativity. Originality. People-friendly technology. And an “it” factor that’s out of this world. It’s all part of the powerful Apple brand, reinforced at every customer touchpoint. Whether you’re looking at packaging, watching an ad or interacting with a Genius Bar employee, it’s clear you’re having an Apple experience. Not to mention the experience the stores themselves afford.

Branding expert Marc Gobé, author of *Emotional Branding*, describes Apple’s retail environment this way: “Filled with light and a pleasing combination of green glass, modern gray tones and

the now pervasive white products, from iBooks to iPods, the store makes you feel like you are in the California home of someone who knows everything and then some about the next wave in computer technology.”⁹

Even a person who has never seen an Apple store can probably conjure up a pretty accurate picture of the place. That’s a tribute to the power of the brand.

“Regardless of the field you’re in, you can learn something from Apple about messaging—consistency,” wrote Carmine Gallo, a communication skills coach, in online *Business Week*.¹⁰

The brand management experts at Apple work overtime to achieve their world-class uniformity, mindfully avoiding the disconnect mentioned earlier. And their results are measurable. In the 1990s, many “experts” considered Apple a has-been. In May 2010, the company shot past Microsoft to become the largest technology company in the world.¹¹

Groundbreaking, beautifully designed products are clearly the prime factor in Apple’s remarkable turnaround. But the company’s consistent brand likely claims the cherished second spot. Owning the newest Apple innovation isn’t just about product function. It’s about the personal cachet of the brand itself.

The satirical news publication *The Onion* captured this emotional need with tongue firmly in cheek when they covered the introduction of the iPad:

To ensure that its users receive the constant public attention they crave, the iPad will emit the phrase, “Hey, does that guy have an iPad?” every eight minutes.¹²

What other brand would even warrant a joke like that?

Five Possible Reasons Your Brand Isn’t Apple

If brand consistency is so incredibly important, why isn’t it commonplace? Why, instead, do we continually discuss brands using an Apple-to-oranges comparison?

Based on what Xerox has experienced with its clients, five reasons continually surface:

1. *Fragmented, decentralized communications.* In many organizations, one group handles high-level brand management, while other groups produce the “routine” documents necessary for ongoing customer communication.
2. *Cost-center myopia.* Post-sale communications are often viewed as a cost center, so organizations economize on development and production, rather than reengineer these documents to improve the customer experience.
3. *Minimal touchpoint unity.* Many companies lack a big-picture view of their touchpoints, missing the fact that each one strengthens, maintains or detracts from the brand.

4. *Taking customers for granted.* Remarkably few companies build on their brand to deepen relationships with existing customers.
5. *Ineffectual documents.* Businesses frequently send out documents that are poorly designed or vastly underutilized, hindering a short-lived opportunity to make a customer connection.

As an outgrowth of these organizational oversights, post-sale communications are frequently relegated to second-class status. They are also often unappealing, confusing or presented in a way that implies that the customer's business is a given. These are not perceptions any company wants to create, particularly in a world where social media word of mouth is becoming the most powerful form of marketing.

Maintaining Brand Quality throughout the Customer Life Cycle

The good news is that there are steps you can take to eliminate the communications disconnect and ensure brand consistency. As an added bonus, these measures can also lead to greater cost control and higher quality.

Tear down the silos. Start by recognizing that all your prospect and customer communications are brand-building opportunities. Take the silos apart and bring your communication fragments together. How? By developing an enterprise-wide strategy that unites your multichannel touchpoints.

Communicate on a one-to-one basis. Customers and prospects want to be treated like individuals. It is more critical than ever to speak to them in a personalized way. One-to-one programs can be developed with the help of outsourcing partners who handle everything from data management and creative development to production and multichannel distribution. When done well, personalized communications are invaluable in promoting brand allegiance.

For example, recipients of a highly personal New York Mets mailer were delighted when the team used XMPie technology to add each fan's name to a photo of a Mets jersey.

A story I heard at a recent Xerox meeting further illustrates the point. A colleague of mine met her husband while both were attending Syracuse University (a school with its own distinct brand—any particular color come to mind?). They married after graduation and updated their alumni profiles.

Since then, the couple has received an annual Valentine's Day card from their alma mater. Inside the card is a note wishing them well, a reference to a local hot spot they may remember and, of course, a donation form. Using basic database information, S.U. is able

to make a personal connection and position itself as Cupid. What happily married couple could resist saying thanks?

Leverage your 95 percent readership rate. According to InfoTrends market research, documents like invoices, account statements and benefits sheets have a remarkable readership rate of 95 percent in North America and 98 percent plus in Western Europe.¹³ Billions of these documents are distributed every year, representing a prime brand-building opportunity. With the help of content and design experts, you can reengineer these communications to include personal information, aid in up-selling or cross-selling, advertise third-party solutions and otherwise captivate your captive audience.

Add color to the play-by-play. Your brand is presented in color on TV, in ads and across the Internet. People expect to see color. Why not add it to operational communications like invoices, emails and manuals? New print-on-demand capabilities and color production technologies make it easy and affordable. You'll not only reinforce consistency, but also potentially increase sales.

Engineer perplexity out of the process. The operational documents mentioned above often cause customer confusion. How much do I owe? Which benefit program is mine? This can lead to costly call-center inquiries and payment delays. The situation grows worse when customer documents don't match the support rep's on-screen forms. Resolutions slow down as customer frustration heats up. But when documents are redesigned to simplify comprehension (e.g., highlighting action steps, due dates, etc.) and are aligned across all channels, you can deliver greater customer value and enhance your brand.

One Xerox client, Aliant, a leading Canadian telecommunications provider, did just that. The company recast its invoice as an effective brand-building tool, while reducing call center demands in the process. Another client, Northwest Airlines, was able to slash customer calls by 50 percent—and promote brand fidelity—with an online self-service solution developed by our ACS team. And the Regence Group turned a complex health benefits form into a powerful customer retention tool (see *Strengthening Brand Loyalty*).

Keep the conversation going. The goal of a sound brand strategy isn't to support a single touchpoint. It's to merge all your pre- and post-sale communications into a continuous, two-way conversation that improves customer loyalty, deepens your understanding of customer needs and improves the overall perception of your brand. Once you've started talking, don't stop.

Strengthening Brand Loyalty with Communication Engineering

The Regence Group, an award-winning health insurer, was experiencing unexpected document pains. Its explanation of benefits (EOB) form—which offers transactional information about plan use—was causing confusion among the company’s 2.5 million members. Customer service specialists were fielding a flood of unnecessary calls from members who had trouble understanding their benefits and costs due to a jumble of jargon and codes.

Realizing that member exasperation could erode customer loyalty and lead to member loss, the company developed a remedy. No easy task. EOBs are complex documents that include dynamic information on a multitude of products and services, drawn from a variety of databases. They are also heavily regulated, which means legal, marketing, IT and other stakeholders needed to be involved.

The Regence solution involved communication engineering, a specialized service that uses design and content development techniques based on behavioral insights into the human communications process. Working with Xerox, Regence conducted a series of Knowledge Exchange Workshops with all key stakeholders and collected Voice of the Customer input. Then we worked together to develop and refine a prototype form.

Comprehension stumbling blocks were identified and eliminated. Form navigation was simplified. Critical information and calls to action were highlighted. And new information, such as year-to-date benefits and out-of-pocket expenses, was added. In short, the form was redesigned to present information of greater relevance in a clearer, more logical way.

According to Carol Rouzpay, Regence Director of Member Operations, “One of our core strategies is to enable our members to make informed decisions about their health care. And this redesigned EOB gives us the opportunity to provide members with transactional information as well as educational and health-related information.”

Equally key, a routine document is now a cost-reducing brand loyalty tool.


The sidebar on the next page helps illustrate the concept:

Regence Communication Engineering: Explanation of Benefits Form

Before

[illegible]

After



Regence

Print Date: 01/03/08
Plan Subscriber: MARY A SAMPLE
Subscriber ID: 123456789012
Group Name: GREEN LANDSCAPES...
Group ID: 33445566

Explanation of Benefits

This document shows how benefits were applied to recent claims. It also calculates member responsibility.

THIS IS NOT A BILL.

We processed three claims on your behalf.

Contact the provider(s) to arrange payment, if not already paid.

Total Regence Paid: \$80.00
Other insurance paid \$20.00

Total Member Responsibility to Provider(s): \$50.00

Claims Detail How your benefits were used to pay for your claims.

Date of Service	Service Description	Amount Charged By Provider	Amount Not Covered	Regence Member Rate	Co-Pay	Deductible	Remaining Amount	Member's Co-insurance	Member's Responsibility To Provider
12/22/07	Medical	\$80.00 =	\$20.00 =	\$60.00 =	\$0.00 =	\$300.00 =	\$30.00 =	\$6.00 = 30.00 x 20%	\$36.00 =
Pricing is based on the maximum allowance for the service billed by this provider.									
12/22/07	Radiology	45.00 =	15.00 =	\$30.00 =	\$0.00 =	\$0.00 =	30.00 =	6.00 = 30.00 x 20%	24.00 =
Pricing is based on the maximum allowance for the service billed by this provider.									
12/22/07	Medical	55.00 =	15.00 =	40.00 =	\$0.00 =	\$0.00 =	40.00 =	8.00 = 40.00 x 20%	32.00 =
Pricing is based on the maximum allowance for the service billed by this provider.									
Totals for this claim								\$80.00	\$50.00

Patient: MARY A SAMPLE
Patient Year of Birth: 01/01/78
Patient Account with Provider: 67867867-2223334444
Claim ID: 886677766888

PROVIDER: STRONG MEMORIAL HOSPITAL, OUTPATIENT CLINIC
Expense DAYTON ID 83664

Claim ID: 886677766888

Claim ID: 886677766888

- 1 Use of color to aid in customer comprehension
- 2 3 Promotion of alternative choices to member's advantage
- 4 Financial impact of member's provider choice
- 5 Explanation of document purpose – what it is and isn't
- 6 7 Immediate clarification of contract payment and member's responsibility

Bringing the Best of Your Brand to Every Touchpoint

While great creative and a solid strategy are essential to exceptional brands, they're really just a starting point. What makes a brand beloved are its details, the way it's deployed and managed, the standards it maintains—the quality of printed materials, the consistency of message, the touches that define products and services, and the personal connections that set the brand apart. Documents are essential to all of it. Integrated, enterprise-wide management of your pre- and post-sale communications is an invaluable way to reinforce brand authenticity and impact.

The need to do so cannot be overstated, particularly in an age where Facebook “Likes” are as valid as expert endorsements, and disgruntled Yelp reviewers can tarnish a business's reputation in a day. It is more difficult than ever to control the market's conversation about your brand. Therefore, it is more important than ever to manage your brand well.

In *Lovemarks: The Future Beyond Brands*, A.G. Lafley, the former chairman, president and CEO of Procter & Gamble, said:

The best brands consistently win two crucial moments of truth. The first moment occurs at the store shelf, when a consumer decides whether to buy one brand or another. The second occurs at home, when she uses the brand—and is delighted, or isn't. Brands that win these moments of truth again and again earn a special place in consumers' hearts and minds; the strongest of these establish a lifelong bond with consumers.¹⁴

Regardless of whether your organization produces consumer goods, every company has its moments of truth. They are represented by your customer touchpoints. And documents can help you maximize them.

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