70. Marketing, Branding & Strategic Survival

With Mark DeVito, Laura Genovese, and Jonathan David Lewis

Laura Genovese: What I love about marketing is that they focus on the audience and understanding exactly who your audience is. So that when you're working, you have someone specific you're creating for.

Mark DeVito: One of my favorite quotes is, actually Jeff Bezos, who says, "A brand is essentially what people say about you when you're not in the room."

Jonathan David Lewis: How we go to market, how we communicate who we are, how we get our work done, is changing dramatically because of the pace of change.

Kendall Lott: For this episode of PM Point of View®, I wanted to explore a world I knew very little about: marketing and branding. I was trying to figure out where and how these endeavors intersect with project management, how the principles that apply to marketing and branding can be used in project management, and how PMs might benefit from actually working with a marketing team and marketing concepts. But more broadly, I wanted to hear how another discipline's professionals discuss how they do their work, their projects. Lateral thinking can help us with some innovation.

I came away with some very useful approaches and techniques that PMs can and should implement, particularly in the area of communications, perception and value. From developing personas to target an audience, to more deeply understanding our stakeholders in all their guises, their needs and expectations, the branding lens challenges us to see better ways of communicating and engaging with stakeholders. It's also about change management, and helping your project or organization maintain relevance in an extremely fast-paced environment.

I invite you to come with me on this fascinating exploratory tour.

Announcer: From the Washington DC chapter of the Project Management Institute, this is PM Point of View®, the podcast that looks at project management from all the angles. Here is your host, Kendall Lott.

KL: To unwrap the marketing/branding angle, I spoke with experts coming from three different perspectives. Laura Genovese is a consultant in the nonprofit and associations space. Through her work with the American Marketing Association of DC, she gained a deep appreciation for the benefits of tapping into the marketing approach. Mark DeVito, president of a creative agency, gets into the actual process of managing a marketing project. And finally, Jonathan David Lewis takes a wider view of organizational development and decline. Based on extensive research and experience, he has developed diagnostics and techniques to keep your brand in the game.

Laura Genovese is the founder of Genovese Consulting. She is currently on the board of the

American Marketing Association of DC, where she helps with programming and program management. Her work there has opened her eyes to the wonderful world of marketing.

KL (02:48): What is it about that discipline that stands out?

Laura Genovese: The most important thing is your audience, understanding who your bullseye target is, what they want, and then finding ways to connect with them. Really, that's what it is. It's making a connection to your audience or your customer. And so, as a project team creating this service or product or event, it's the marketers who allow you to get connected to the person it's actually intended to serve.

KL: The project managers probably have a natural affinity, or can actually do what you're talking about, in that we have stakeholders and stakeholder analysis. It's been formalized in the Body of Knowledge, and an understanding that project managers must relate to the stakeholders. And actually, that's premier.

LG: Right.

KL: Additionally, communications, communications planning, not thinking of it as a marketing thing per se, but the communications both internally and externally, planning those communications and validating the effectiveness of those communications…

LG: Right.

KL: …are part of the skills that we're supposed to know. But I don't know that we think of it as marketing. Or even marketing in the context of our own projects. So from what you've described – audience and knowing what their objectives are, and being able to connect to them – the PM point of view on that is, "Oh this is stakeholder analysis with associated communications planning. Now, I know what you're talking about."

LG: Yeah.

KL (04:16): What is it that, as a person who's had to projectize her work, and then now in the space of marketing with marketing professionals, let's talk a little bit about how you see the two fitting together.

LG: So for this specific example – educational programming…so an event – our project team was very separate from the marketing team. So of course the marketing team was aware of the event, they had the general concept of the event, and they were marketing the event for us. But my boss, one time was like, "Let's have a meeting with the marketing team," and I kind of was like, "Why?" Because of the working team does the marketing, and we do the programming, so I was kind of like, "Okay," and like "Why?" But then once we really came together, the marketing team, they have so many more thoughts, and strategy going on, that when we learned what they wanted to talk about and what audiences they wanted to reach, we were able to see first of all, "Oh, there's even more audiences you can reach," because we know the project, so well.

And also they gave us ideas on how we could improve or change our processes, too, because they even thought maybe of some audiences or some ideas that we didn't think of.

KL: So they kind of widened the viewpoint on audiences for a project manager, do you think?

LG: Yes, and understanding at least, what we discovered was, there are different segments or different audiences that you can look to, and by hearing their ideas, or narrowing down their segments, it allowed us to realize, "Oh there's additional processes we can take and we can add into our process to have a more effective or successful event." For example, the marketers, they wanted to market to first-time attendees of a big conference to inform them about our educational programming.

So that was not something that we had originally thought about as an audience. For us, it was the people coming to educational sessions, we were creating for them. So after them, kind of exposing this new idea of an audience, it allowed us to see it as an opportunity, and so we created an on-boarding or an orientation for first-time attendees. So we were able to add to our project, to add value to attendees, to try to bring more people in, and to make their experience more valuable and more effective.

KL: Because they were thinking of your audience broader than you were, or how to communicate with that audience? What do you think triggered that thinking?

LG: Really both. They thought, they realized that that was an audience that they could market to, and they thought of the fact of needing to communicate. Like that was a need that they could communicate on, and then we were able to take it a step further and make it even better on-site.

KL: So PMs, this is not stakeholder management, this is actually analysis of your stakeholders. We would call that using a stakeholder salience model. What kinds of stakeholders do I have? And what are their needs, and how do they vary? So I know how to talk to them. And it has impact on scope. You changed what you had to do in your project, what were elements of the outputs of your project now.

LG: Right.

KL (07:37): What else have you seen in terms of the way they can interact? A project manager pulling on this discipline of marketing? If they could get hold of a marketer, what should they be asking them…?

LG: Yeah, I think another huge thing that helped with communicating and increasing the engagement with the marketing team or the marketers: understanding what their strategy is, the marketers explaining, "This is what we're going to be putting out, this is our calendar of promotions, our campaigns and stuff…" By understanding what they need, it did allow us to be aware of their timelines, and so we were able to make a couple of adjustments to our timelines, so that we could work together, so that there was data. Or maybe they needed attendees' information…It really can be whatever project you're working on, there could be certain data that you have, that the marketers would need. And just by having that open communication, and understanding their timelines and their goal timeline, you can connect and make sure that you're providing them what they need to be most effective.

KL: Now schedule. So now schedule and time management got altered in there. And you found that

to be helpful in producing a better product? For both of you?

LG: I think understanding what they're going to be doing with it, the data or whatever they're asking for…by knowing when they need it, to be able to get it for them, it could potentially set *your* schedule up for success as well. By re-arranging your schedule based on that, it could allow you to see a better way for the flow. Or something happening sooner…you complete something sooner and that allows you to piggyback off of another future task.

KL: So the dependency shift, if you get more information, and in fact they may be able to provide you information about some of your stakeholders. Does that also happen?

LG: Oh, absolutely.

KL: Now, because we've done this, we can give you some input.

LG: Yes.

KL: One of the biggest things with project managers is making sure they're doing what their customers want. Or with the stakeholders…people who have influence on our work…

LG: Right.

KL: …need from them and an alignment while they can perform their activities, right?

KL (09:49): The questioning between the teams. What is the nature of the questioning that you see?

LG: So the questioning is, from the very beginning, meeting with them and brainstorming on who they view as the key stakeholders, as a potential audience. And then them having the chance to ask you as well. You know a project so well, you know what's going on, you could see opportunities. And so just having that open dialogue with asking each other and brainstorming together… What I've realized is, first you need to have a marketer's point of view. You need to be aware of it…

KL: Ooo, a new podcast, Marketing Point of View.

LG: So like if you are aware of how they're thinking, or the types of strategies…

KL: Tell me more about that. How do marketers think? What is the inside of their thinking that you're seeing?

LG: It's all about experience now. It's not about just the sale, it doesn't just end there. You'll notice that brands that are very popular and are doing really well, they have really great connection, and they have reasons to connect with their customer, and they create opportunities of connection with their customers. So having the ability to put that lens on.

KL (11:06): Brand architecture. What is that?

LG: It's about really understanding who your "bullseye" target is. Who it is that every single person in the organization or company is serving. And then in addition to the bullseye target it also focuses

on deeper layers. Who do they want to be? What kinds of things do they want to create? Kind of "personas" you could say. So that way you understand who your bullseye target is... You understand what types of things they want to achieve. And then in addition to that, within your brand architecture, you also identify your organization or your company's assets, so what you can provide them, how you are meeting those needs.

KL: And I'm wanting to abstract that because I think that might be helpful for a project manager because it's pushing our stakeholder analysis a little bit deeper, past the politics, past the customer, but a little bit, what is it that they want to use? What is it that they need from my project? And deeper, how will they use it? So whether they're in oversight, so they need to get status from me, or whether they're the end user of the product, they're going to have to use it for something, they need something from me, for a reason. And it sounds like this concept of brand architecture as you experienced it was a structured way of looking a little bit deeper, identifying segments, identifying key bullseye areas, but also what they're going to do with that. That would be an interesting discipline for project managers to, even if they didn't have a marketer on the team, or a marketing project, that they could use this part of the discipline to think through that aspect of their own application of activities and skill to a project.

KL (13:01): So it's time to break down the silos. Project managers need to be cognizant in organizations, that there may be a marketing team that needs to be connected to them. There are professionals involved with content-making and outreach related to a project in many cases, with implications for scope and schedule.

Part B of this conversation, to me, is that the skill set, and the way they look at the world, is helpful. That a project manager, even if they were working in a space without a marketing team meeting, to push and promote their product. That they should be seen as a function of project management. We even have it: stakeholder analysis and management. And that this technique – I'm liking this brand architecture concept – a structured way, a beginning of a thought process for really thinking about all your different stakeholders, and the idea being that they have needs that you're trying to meet.

So whether you're doing something that has a marketing team or not, the marketing discipline, the marketing thought pattern, some of these key elements are important for a project manager in producing a project.

KL: Know thy audience. From taking the marketer's point of view to brand architecture concepts, we highlight the need to get deeper into the needs of stakeholders, or even potential stakeholders. The marketing discipline gives us the insight to drive the experience, not just the sale. As always, know thy stakeholders from customers to the oversight layer, and think, "What do they need from our project from an experiential level?" And that can lead to an understanding of what they value. You can check out Laura's blog on her website, genoveseconsulting.com. And for those who do Instagram, go to genoveseconsulting.

KL (14:51): Mark DeVito has more than 20 years' experience leading brand-centric campaigns and creative content strategies. He is the president of Beyond Definition, a strategy and creative agency, and he, too, sits on the board of the DC Chapter of the American Marketing Association. His discussion of doing marketing and branding projects led us to talking about clients – that specific stakeholder that is paying you for value. Working with them and understanding the depth of the client experience, understanding their limits and power of what they know, helps you craft and

deliver a solution that gets beyond the transaction, but into the effectiveness and impact. You are hired to deliver, to solve something, that they can't get without you. Good clients understand the power of time and for all of our demands for customer intimacy, it turns out you could over-collaborate. So watch out. Mark leads us into a deep understanding of what branding components are for companies.

KL: So what do you do?

Mark DeVito: What our company, and what I do, is to try to find solutions for clients so that they can create more connectivity with their audience. We're very heavily focused on brand and what brand means today.

KL: Tell me, what is it to be doing branding?

MDV: I have a very traditional outlook on brand. One of my favorite quotes is, actually, Jeff Bezos, who says, "A brand is essentially what people say about you when you're not in the room."

KL: Right.

MDV: Right? So the perception that people have about who you are and what you stand for, and what you do, in a very short order, right? Not a lengthy dissertation of what you're trying to accomplish as an organization or what not, but the brand has, in essence, core reason to be. And to really dig into that, and to dissect that, is branding.

If you're trying to re-position a brand, you're really looking at the current marketplace, you're looking at where you want to be as an organization, you're looking at goals, you're looking at the understanding of what your audience really needs from that brand, right? And how they're going to interact with the brand. What it stands for. So, branding, today, is positioning. It's trying to figure out exactly how your message connects with that audience.

Sure, a certain part of branding is the visual component that everybody aligns to, and they think of branding as being the Apple logo.

KL: Right.

MDV: But branding is so much more than that. Like to create the essence of what brand means, means that you're really digging into perception, you're really digging into how people are going to behaviorally react to who you are as an entity. So we talk about personas a lot in marketing. The persona applies for the most part to the type of audience archetypes that you need to connect with. So these are the types of personas, this is how we prioritize them.

You know the brand persona is probably more powerful and more important than it's ever been. So who are you as an entity? What are your likes and dislikes, as a brand? What does that look like if your brand was a person or an animal or whatever it might be? What are those kind of core characteristics?

KL (18:11): Although a brand lives on and on, your role with that is, you're going to be hired to do a series of activities and thoughtful things with them.

MDV: Yes.

KL: And at some point in the future, you stop working. Your project is done.

MDV: Yes.

KL: So what does it mean to do a branding consulting gig? Just generally what are you addressing, what are you looking for, what do you do?

MDV: The most important component, to kick things off, is deep research, both internally at the organization, and that consists of everybody from your key leadership and stakeholders to, if it's a very large organization, other levels of stakeholders who have touch points to grant, right? Companies know more than they think, right? We're in there to connect some of the dots, we're in there to…

KL: Is it discovery mode?

MDV: …to discover. Yeah, we're... One of the things that's kind of a hallmark of our process is workshops. So we just did a big project with George Mason University. So we were hired to try to look at some of the different layers of their brand. Obviously, they've got a very diverse audience that they're trying to speak to, and they've got a very strong visual brand. But what are these… who are they, what do they really stand for? For other organizations, other universities, in that space, what makes them different, right? What makes them really stand out?

So, we conducted very large scale and some small scale workshops, where we bring people together. We go through rigorous exercises to try to get them to think a bit more critically. The outside perspective is always super helpful. And we then take all those results and we create this kind of deep insight.

KL: Do you do an external look at that point as well?

MDV: We do, we do.

KL: Internal and external? So a deep research.

MDV: Yeah, the external piece is very critical from a perception standpoint, right? So the external piece really digs into, sometimes if we're dealing with small companies, we're looking at their current clients, or their current customer base. Sometimes we're looking at their expired or their old customer base, or ex-customers who, for whatever reason, don't find the brand to be relevant for them.

MDV (20:38): All of these kind of research inputs, no matter where they're coming from, need to create the spongy tissue in between your bones. There needs to be the insights. And if you don't have that... You don't really have anything. Raw data, and then turning that raw data into actual actionable items that you can do for the brand, and for external communication…

KL: Is that where we get... this is really about communication?

MDV: Yes, absolutely. You're trying to find a way to tell your story best, in the most powerful and impactful way to that specific audience. We're all trying to find the best and most simplistic way to tell a story for the audience so that they can think about you in the best possible way.

Brand is really, is categorized by the art of simplicity. So the most minimal amount of words…People talk about their brand story, and waxing poetically about all the different things that you do, and start-ups are notoriously bad at telling their story, because they're like, "Well we do this and we do this, and we do this," and they can't…you know, if you're everything to everybody, you're not anything to anybody, you know really, at the end of the day. So you have to really be very specific with segmenting your audience and thinking about how you want to communicate with them independently and finding the least amount of words to do that.

KL (22:15): I am intrigued with this product that seems very...

MDV: Esoteric?

KL: Esoteric is a word. Ephemeral is a word. But is it … vague?...is a word? I don't know what I'm getting.

MDV: That's one of the biggest questions we're asked.

KL: What do you produce? And then let's weigh in with this second question right behind it: How do you scope that?

MDV: What I was touching upon earlier with the workshop, typically I like to see that outside of scope. I like to see that as kind of being prior to scope. If we can sit down and uncover where some of the problem areas are, before we actually even scope out where we're going to focus on, where all the problem areas are…

KL: We're talking about left of charter. Before you've even started.

MDV: Right.

KL: I think I want you to do something.

MDV: Yeah! And I don't want to get on a 60-minute call with a client and kind of go through this kind of deep exploration because we're not really going to get to the heart and the root of some of the things that are a little bit deeper…

KL: OK, so what is it you're going to end up trying to produce with some of these things? Do you hand in a white paper at the end and you walk away?

MDV: It's a great question. Every situation is a little bit different. What I like to think of it is, as an organized booklet. Basically it's everything from all the central messaging, all the insights that we generated, where those inputs came from, it's a report and it's designed to be an internal resource for everything that you do.

KL: Now, you just described an as-is condition there. You just uncovered how they're viewed and how you knew that. And therefore, there's a recommendation for change?

MDV: So we have a very collaborative process, where we arrive, after the insight piece, on what the brand positioning should be. And if you've done the correct exhaustive research with the right people, and that was done well, and you had the right amount of time through the project to do it, you should be able to arrive at a final focal point. You should have maybe an A or a B kind of variation on it, but for the most part, you've kind of got there, right?

MDV (24:31): And then you get into what I call our marketing roadmap, which is a list of suggested recommendations on how to then share that with the world. What's the phased approach for you to…

KL: What would be an example of that?

MDV: That could be a campaign, that could be…

KL: Go on, what does that mean?

MDV: …a specific…could be a campaign that kind of showcases your brand to the world. Digital campaign. Could be an advertising campaign.

KL: Make this commercial…

MDV: Yeah.

KL: Putting this out on your Facebook page.

MDV: Yes. If it's an association, typically, we say, "Okay you need to share the new exciting brand with your membership, right?

KL: Right.

MDV: And here's what that would look like. Maybe you do that at a trade show. So that's a very pivotal point in what the brand needs to do next, right? And it's not, "this tactic follows this tactic follows this tactic." It's a very layered approach, right? You want to update all of the external communication they use. You want to update everything you're doing internally with the brand. Your website, of course, is a huge component of that. Going out and being in environments where you're actually really literally talking about what the brand means. But using that language, that we've given you to create, to build the foundation to use…

KL: So you produce for them the messages and some things they need to do, or you would recommend that they do, to get those messages out in their context…

MDV: Ccorrect.

KL (26:00): So tell me about a branding team. How many people would have a piece of this work? I understand they may not all be full-time.

MDV: Two wings, a center, two defensemen and a goalie. That's pretty much all you need.

KL: So like, what are these positions that you typically would have?

MDV: So you have a project lead, who's like your center, who's kind of driving the path forward. You know, front lines. You have your specialties, who kind of flank that main position. If you had a project lead on a brand project, you'd have a marketing person and you'd probably even have a creative director. And those people would be working kind of hand in hand with the brand strategist or the central project lead.

Then you've got your team of resources, you've got your researchers and you've got your marketing support, and you've got your copywriters and you've got all the people who kind of need to make that work. And then you've got one person who's kind of like filtering everything. So I always think of the goalie is almost being your…

KL: What does that mean, filtering?

MDV: Filtering – translating the process. Translating how the process is going both for the client. You know, we talk a lot about customer experience, but not a lot of people talk about client experience.

KL: So explain the difference.

MDV: The customer experience is really a part of our marketing prowess, right? We need to understand how the customer thinks and feels and…

KL: The clients' customer?

MDV: Our clients' customers, right? Our clients experience is the engagement. It's a very personalized experience. And it's much more intricate. To me, the client knows more than they think, right? And it's our job to uncover their strengths and weaknesses, so that they can be successful at their job. Especially a director of marketing, like a big corporation. They're hiring the agency to not just empower their brand, but to empower them, right? To get them to the next level. To be the sooth-sayer. To be the one in the background, really, helping to amplify what they're doing well, and maybe what they could be doing a little better with their team, even.

KL(29:08): In balance, how is it working between analysis and creativity?

MDV: You know, I don't believe in the right brain, left brain. I like our analysis to be very creatively generated, and very creatively presented, and very creatively positioned. And I like our creative to have a lot of analysis in what we're actually purposely putting in front of the client.

You can't have the strategy team design the logo, for example. And you can't have the creative team do all the core research and do the brand messaging, right? But you can have them at the same table, and you can have them being a part of that process, and you can have them influencing that process, and that's where I think a lot of agencies go wrong. I think that they have their groups and there's a pass off there's a pass play.

Passing really shouldn't be a part of our process. We should be a very cohesive team that's all in it together, that's along for the ride, that understands every part of the process. And so no matter where your focal area comes into focus along the route, you've been riding shotgun the whole time.

KL (29:24): Sometimes though, the barber has to cut their own hair.

MDV: Yeah.

KL: Because it could be there's a project management group out there, told we have to redo our project management organization.

MDV: I think the hardest thing is that, if you reposition yourself, you're not just repositioning your name and the way that you describe yourself. You are changing how you do business. If you're really kind of shifting your paradigm, that's the hard part. Because not only now are you having to match the way you're marketing and promoting what you do, but you're also having to do it, right? You're also having to shift the mindset of the people who work here. You're having to the shift how we talk about ourselves, and how we actually do some of the work. Because a lot of times the innovative piece of branding incorporates a new methodology, a philosophy a new…

KL: So it's a change management problem.

MDV: Yes! Exactly!

MDV (30:26): So people's expertise isn't going to change, but how they work together, and how they create something even bigger with that expertise. It's like Legos. You can have a whole big tub of Legos and you knew all the sets that those came from, and one of them could have been very specific to this or that or this, but until you really dig in and start to see how they all sort of fit together, then you can create something that you never even perceived was possible.

KL: How do you think that through as a leader?

MDV: It's hard! It really is hard. And it requires…

KL: Are you looking at their personality or are you looking at the nature of work?

MDV: I think it's a little bit of both.

KL: It sounds a little like it's an adaptive system. That once you get started, you're going to see a change.

MDV: Yes, probably it's a 50-50 split between trying to really understand what's working in your team, and then doing some deep analysis to develop a deeper understanding of what's possible. And that's not instinct. That's really kind of living and breathing and working with some of these people and seeing the types of work they do, and seeing how they're interacting with people and clients.

KL: And that would be true with any client you would go in to help, I would imagine.

MDV: Yeah. Sure.

KL: You're having to…that's your deep research. That's part of your push in there, right?

KL (31:45): So, what makes a good client for a branding project?

MDV: Oh my, that could be a whole episode unto itself.

KL: We can schedule that one later. Give me the teaser.

MDV: To me what makes a good client is one who knows where their own weaknesses are, and doesn't try to over-compensate for what they do and they don't know. They're hiring us to augment their process, to complement what they're trying to accomplish. And if they're forthright with themselves, right, and how this missing piece in their current environment is going to be solved by bringing in people who do what they do best, and they're vulnerable there, then it's usually a really good dichotomy of our personalities and what not.

It's also a client who understands the power of time, right? That things take time, right? And there are certain things, and I'm the child of urgency, coming from the television and political spheres, and all these things that require just a quick-paced approach to pretty much everything we do. But I also really respect time. Radical Candor, a book that I'm currently reading, talks about how different successful people have different tactics, and one thing that really resonated with me is the CEO who scheduled a two-hour block three days a week in their own schedule for just thinking time.

Because sometimes you just... You need that space, that brain space.

KL (33:25): What makes harder clients?

MDV: You know, it's funny because we often talk about partnering with our clients with deep collaboration. I'm starting to change my mindset on that. I think that we *do* need to collaborate with our clients; I think that you can over-collaborate with your clients. And I think that clients who want to over-collaborate tend to be bad clients. I think that they need to let the agency do their work, and that doesn't mean that we're doing it in a dark shrouded closet, and then we reveal it to them in this big monumental way that scares them.

I think the way to avoid it is to have a very structured understanding of where we're going to be mind-melding, right? It's not going to be all the way through the process; it's going to be here, here, and here.

KL: It's scoping, not just the points on a schedule, but the areas…

MDV: …the areas that require your insight, that require your investment. Because I don't want to just show you stuff, you know? I want you to think with us.

KL: To learn more about Mark's company, Beyond Definition, visit their website, beyond-definition.com.

KL (34:51): And now, for a deep dive into organizational life cycles and how to stay relevant in the

current marketplace, we turn to Jonathan David Lewis, Vice President and Strategy Director at McKee Wallwork and Company. They specialize in turning around stalled, stuck, and stale companies, and it has a branding lens.

Jonathan D. Lewis: I work heavily in business models, business strategy, and help organizations take that and actually implement it over time, in a very different, very challenging world we all live in.

KL: Oh, you're thinking it's different, in terms of technology advances of late? Or what kinds of changes are making you think different right now?

JDL: The pace of change has changed the game. Fundamental principles have remained the same largely, but how we go to market, how we communicate who we are, how we get our work done, is changing dramatically because of the pace of change, and it requires us to be more iterative, more agile, more open to failure and learning, the very different concepts that really have risen out of Silicon Valley that the rest of the business world needs to understand and adopt because every business is not only being disrupted today, but, as the saying goes, the core of every business is dying. So what are you doing about it?

KL: Wow, I hadn't heard that saying. So now there's shivers down my back.

KL (36:19): How is this a branding problem?

JDL: When we say the word brand, it's a reputation, not self- defined, but defined by your customer.

KL: Yup.

JDL: And a brand is simply, if I were to walk up to your customer and say, "Hey what does X, Y or Z stand for? What are they?" It's their answer. That's your brand. If you ask anybody on the street does your reputation matter? The answer is yes, it totally matters. It matters more than anything.

Organizations are coming to us, they might walk in the door through marketing, but their problem is at the business model level, or even, often, the culture level. So, we as an organization, have had to take a step back. We've had to beef up our consulting and be able to have these conversations and have actual research around it, so we can step in and say, "Okay let's work on your brand as defined as your culture, your business model you're positioning, and your go-to-market strategy.

It is who you are, that is what your brand is.

KL: I like this point, by the way you're making, which is, you don't brand something. You are *branded*. Where does the brand come from? Is it purely in the customer service and product?

JDL So something that we think about a lot, and we talk about a lot, is most businesses begin by focusing on their product and doing good work, and over time they build a reputation and that is your brand. Whether you're intentional with it, or you understand it or define it, you actually have one.

What the opportunity is, is once you've built your reputation, smart companies take it, make it, mold it, and use it to then further drive their business, and their product. It's not this thing where you sort of just make it up and, Okay, hopefully, the world, will buy it. No, it's about who you are already.

JDL (38:10): Patterns arise quickly with any mature industry, and actually there's wisdom in the patterns and there's opportunity in going against the patterns.

KL: It's very Zen-like. Give us an example.

JDL: Yeah, so death care is going through disruption as we speak. Clearly, people are still passing away, but what's happened is the preferences of the culture have shifted wildly. More and more people don't want burial, they don't want services, and that's where the business lies. So, the pattern in the business was to be very conservative, very careful, very risk averse and serve this declining segment in the marketplace.

The first thing we've done with our death care clients is we went in, we actually worked with 13 of the biggest funeral homes around the country, to do a marketplace study and understand the trends. That then gave us the perspective and the confidence to make some pretty tough decisions. The first one was to disrupt the industry. We actually started a company called Passare. You can look them up right now, passare.com, which is... It's like an Amazon for death care.

And so that was the first solution. Let's actually…we know we're being disrupted. let's lead that charge, instead of accepting the disruption. Then the second thing we did was actually to refresh the dying core, as we said earlier, right? Refresh the core of the business that exists today.

And that was through our YODO efforts where we... we actually completely redefined the marketing for a major funeral home. YODO, being You Only Die Once, was the main campaign. And we were trying to raise awareness among a younger set of people that death care is serious, obviously, that it's important, and that grieving is important.

It was very much focused on becoming relevant to a new generation. And both of those things in tandem – business model solution with Passare, and then current marketplace solution with YODO – has served the industry and our clients very, very well. It's really turned things around.

KL (40:30): Tell me more about this. What are you seeing through these disruptions and what's happening?

JDL: This really goes back to the research we just conducted, and what we were able to do is really map out our disruption, cycles. We all go through this beginning phase – high growth, if we're successful – we begin to mature and have to learn new, more sophisticated systems. But then there's a point where growth stalls, where we saturate marketplaces, and eventually become very commoditized. And if you're not careful, what most of us do when we're commoditized, is we tend to sort of cling to what we know and hope we can stay alive as long as possible and resist disruption.

But you see kind of two paths for companies there: they die a slow death, or they're immediately disrupted and go out of business. The third path, which some companies are able to do, like Apple, Lego, Marvel, is actually to disrupt yourself and remain relevant for whatever new future arises.

Now the core challenge that all of us are facing, in the entire economy, this disruption cycle is going faster and faster. So it used to be, especially pre-digital, you used to be able to spend a majority of your career going through the cycle. You could start perhaps in an industry that was in high growth and mature with it and maybe it slows down and gets commoditized by the end of your career, but it's still a viable career.

But that doesn't exist anymore. Entire industries are going through the disruption cycle in 5 or 10 years. We can't sort of rest on old ways of doing business, long planning cycles, different things that we used to do. We have to really change how we operate, and I think the pace of change is one of those key things that's driving why we have to do things differently today.

KL (42:31): Is there a sense where you are working with your company that you intervene depending kind of… if they're the beginning of seeing that problem, they're in the middle of it, or something's already gotten critical for them?

JDL: First and foremost, you need to understand where you are in the disruption cycle. So are you highly commoditized? Is your growth slowing? Or perhaps you are on the front end experiencing high growth and kind of enjoying that. So depending on where you are, the kind of the core truth behind this concept, that the core business of all of us is dying, is that it's about balance. It's about balancing your core dying business. Whatever is paying the rent, keeping the lights on with R&D, with learning, or investing or testing in whatever the new emerging market, new emerging product, the new emerging opportunity is for you. If you're highly commoditized, and you see disruption coming or it's already happened, there's new competitors, new platforms…If you're in that role then you need, the balance needs to be tipped towards the R&D. You've got to jump on that pretty quick.

If you're maybe a little higher in the cycle, maybe you're in the maturation phase, you're still doing alright, you're still making healthy margins, you're not highly commoditized, then the balance is don't take your eye off the core business and you... You're tipping the balance further in that direction. So your R&D budget, it's there, it's not neglected, but it's not necessarily the core emphasis today

KL (44:04): Is there a problem with being in the commoditized role itself? I mean, we know that sounds like lower margins, but it also sounds very stable.

JDL: I think the conception or the idea that there's safety there is an old idea, simply because that relies on a level of certainty, a level of longevity in marketplaces that just don't exist anymore. We don't spend as much time in the commoditization phase as we used to. The other issue with commoditization is the internal aspect, what it does to a company when you're commoditized.

And one of the key things we wanted to understand through our research was, how do business leaders view themselves? What are the behaviors and the self-reflections they have in the different phases? And what we learned was, in acceleration and maturation, kind of these higher growth areas, the organizations were healthier, they had a more positive outlook, and they were very focused on marketplace issues.

When you're tipped over to saturation, and certainly in commoditization, when growth slowed and you were commoditized, everything turned to inward. First, everyone began to question leadership,

began to lose their focus, lose their nerve, and became paralyzed.

KL (45:28): And so, I'm a PM, I'm in an organization that may be moving into saturation, or perhaps even commoditization. From a business perspective, we're going to see unhealthy behaviors. What all would you describe in terms of a team's dynamic?

JDL: What we've learned through our three rounds of national research now, is that there are seven factors that affect growth. Three of them are external. So there's things like the economy or competition, somebody has out-positioned you, or is out-hustling you. And the third one is disruption. So that can be…you know, a new tax law might put you out of business or Uber comes along and just changes the game.

But four of the seven factors that influence growth are internal. And so those four factors are things like a lack of alignment among leadership, a loss of focus, a loss of nerve and inconsistency in how organizations go to market. As we go along the disruption cycle, we mapped out these seven factors and asked our key questions among this group. Organizations that were in acceleration or maturation phases, these high growth phases, they weren't perfect, they had problems, but they internally were very healthy among those four factors. They were aligned, they had focus, they had nerve. As organizations tipped into saturation, and especially commoditization, every one of those measures dropped into the unhealthy zone.

Teams that are in commoditized industries tend to struggle with all four of those things. There's no alignment, there's no focus, and these are the things that ruin any sort of initiative.

KL (47:10): This alignment, or lack of alignment of the management. Tell me a little bit about that real quick.

JDL: Alignment, honestly, is probably the primary issue here. You can have the best plan, you can have the best strategy, you can even have very talented people. But if the team isn't aligned around what you're trying to achieve, you will struggle or fail. It's just a fact. And we see this across the board.

In some of these fascinating case studies, over and over, the alignment was the key issue. Not even strategy, but are we even rowing in the same direction here, folks?

KL: And I think it's because alignment is really touching on our cultural issue, isn't it?

JDL: I think alignment is something that's deeper in culture. Something that I really respect from Amazon, which is "Disagree and commit."

KL: Yeah.

JDL: So alignment isn't about everybody agreeing. It's about everybody deciding they're going to go in the same direction, which begins with everyone being heard. It's about leadership. These are fundamental issues that precede strategy, precede project management, precede even focus, nerve and consistency, although in reality, you can't really pull them all apart, they're all working together at some level.

KL (48:36): Not being focused. How did you see that as a weakness?

JDL: You see this over and over as well. Lego almost went bankrupt in the early 2000s/end of the century. And it was because they had totally lost their focus, and were investing in every side product on earth. I mean they had basically taken their eye off of their core product, which was the Legos themselves, and were investing in anything you can imagine.

And to turn that ship around, they actually had to cut things, re-focus on their core product, which had become unmanageable. Now, the same is true of Marvel, which did go through bankruptcy in the 90s. Lost everything. And their solution was to cut all of this unfocused fluff; rehire all of this talent that were focused on the comic books; and re-focus on the common books. And that then gave them the creative force to then learn how to get into the movie-making business, which then led to the $4 billion acquisition by Disney.

Every time you see a wayward organization. Apple, IBM, and others, the solution relied with strong leadership, a team that disagreed and committed. (Even if they didn't totally agree, they still committed to going with the leader.) And then a refocus of what the organization was about.

KL (50:04): Where do you observe the loss of nerve, and how does that play out?

JDL: You can feel it when an organization is paralyzed. Usually what's happened is, is there's a lack of information and a lot of risk involved, which makes us all very uncomfortable. And so the very natural response is to shut down and do nothing. And organizations who get to that point, and can't get out of it, are in a very dangerous position.

You see it come to life in everyday decision making, from organizations who know who they are, invest in themselves, invest in training, invest in people, invest in marketing, invest in R&D…There's a value understood outside of hunkering down and trying to make it through the day. Organizations who get that, have a level of courage and the level of vision for the future, and so they will invest in the things that they understand will get them there.

KL (51:10): You talk about inconsistencies going to market as an internal phenomenon, how did you observe that weakness?

JDL: So this really has to do with opportunism. So organizations who are acting opportunistic versus strategic tend to become very inconsistent. And so some of the famous examples will be something like Burger King vs McDonald's. Burger King, for 25 years now, has really struggled, where they've gone through CEO after CEO, vendor after vendor, ad agency after ad agency. They're all over the place. Their product line's been all over the place. They're extremely inconsistent because they don't know who they are. They're not aligned. If you look at any of their successes, it's usually been opportunistic short-lived short-term.

You look at McDonald's, on the other hand, over that time, even through their own disruption cycle, they are very consistent, very focused and strategic. And it really goes to the core of their ownership and their franchisee structure, where they're really a real estate company. They own all of the land that their franchisees operate from, which gives them leverage over the franchisees, and allows them to have a level of control. So, there's structural issues here that enable some consistency.

But even if you look at how they go to market, they're getting very aggressive. They've done the coffee thing. They're changing how you order. Now, if you walk in, they're looking at automated ordering, they deliver. All of these things are changing, but the food has remained very consistent, the marketing has remained very consistent. They're evolving the things that need to be evolved. They're not being opportunistic in that; they're being very, very strategic in it. It's a simple measure of, Why are we doing this? "Why are we taking this action?" is the key question. Does it align with everything else that we're doing and that we know we should be doing?

KL (53:10): So which comes first in the observation? The managers of an organization begin to recognize there's no growth and then these things begin to happen to them internally? Or, as a project manager for example, I might start seeing these behaviors, the lack of alignment the lack of focus, and without intervention, begin to realize we're about to become limited in growth.

JDL: So you're touching on a really interesting observation that came from our research here. We actually believe there's an early warning system in place that's measurable. This isn't just a gut feeling here, it's actually measurable. So when you look at the saturation phase, there are key characteristics. They all identify as growth slowing, certainly, so if that's happening, you need to pay attention. But they also feel lost, they tend to over-think things, they become very opportunistic, they focus on speed over quality.

And we actually have a self-diagnosis survey that we conduct with clients, that's available, that you can take the survey and identify those very same behaviors... So what we're now advising is, if you're paying attention to your behaviors and your internal culture and you're actually measuring it every so often, every three months, every six months, you can watch for these key signals. And when you identify two or more, that's when you need to take a moment with key leadership and take a step back and say, "Okay what's going on here? What do we need to do?" It's not the sky's falling, but there's a moment where you can take corrective action before it gets too bad and you're stuck in the commoditization zone, where really there's probably some more drastic measures that need to take place.

KL (54:59): What are the interventions that people can participate in with those things, as you highlighted, we can control.

JDL: Organizations, when they are in these high-growth phases, they report external problems. So things like competition, technology, regulation, all these external themes is what the leadership was worried about. When organizations tip into saturation or commoditization, their biggest challenge, self-reported, is internal. They start complaining about leadership, communication, miscommunication. All of these things that are very self-focused, the moment that organizations are the most relevant to the marketplace, they're the most focused on the marketplace.

So one of the key interventions here is to step back and get perspective outside of yourself. Because commoditized organizations and teams are self-centered. Stop thinking about yourself and start obsessing about how to solve your audiences, your target, your clients' problems. Obsess about *them*. That is the first step.

KL: And so the project managers could also be participating in that – this idea about what should we really be focused on.

JDL: Project managers are in a key position. They have an insight, an opportunity and an exposure to the marketplace, to the customers and the clients. They feel the pain. They have an opportunity to learn what is necessary to remain relevant, and to be relevant, and to regain focus and get your nerve. I think project managers are in a position within organizations that hold more power than they may even realize and actually hold more insight than some may realize as well.

KL: To explore some of these topics in more depth, check out the podcast, "Business Wars," which covers the Netflix/Blockbuster battle. Also, there is a book that I highly recommend: The Work of Leaders: How Vision, Alignment and Execution Will Change the Way you Lead. And if you want to take the survey Jonathan mentioned, to determine what stage your organization is in, go to mckeewallwork.com. It's right on the home page, and takes roughly 60 seconds. What have you got to lose?

So branding and marketing are as much science as art. You have to do the research, analyze, the data, and then focus your efforts on your bullseye target – all your stakeholders past present and future. And remember, PMs are uniquely and strategically positioned to have insight. With access to the external/customer point of view, as well as internal insights, you can play a key role in identifying shifting demands or needs from your customers, as well as symptoms of distress within the organization.

Special thanks to my guests, Laura Genovese, Mark De Vito and Jonathan David Lewis.

Announcer: Our theme music was composed by Molly Flannery, used with permission. Additional original music by Gary Fieldman, Rich Greenblatt, Lionel Lyles, and Hiroaki Honshuku. Post-production performed at M Powered Strategies.

KL: PMPs who have listened through this complete podcast may submit a PDU claim for one PDU in the talent triangle "Strategic," with the Project Management Institute's CCR system. Use provider code 4634 and the title "PM POV0070 Marketing, Branding and Strategic Survival." You can also use the PDU claim code 4634 DJ9EXJ.

Be sure to tune in to next month's episode on Negotiation.

Myles Miller: What's mutually beneficial for both of us? It's all about relationship and rapport, because that's what determines the success of a negotiation.

Mari K. Eder: And going into the session, having that vision and understanding where you want it to go, leads you to how you set everything up for it. You've already done the homework, you know the person you'll be talking to. It is setting the conditions to have a positive conversation.

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