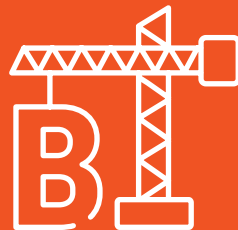


# Brand Experience

March 2016





# Foreword

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**In marketing, we are all after one thing:**

**space in a consumer's mind.**

To achieve this, a positive brand experience is required. After all, if a consumer doesn't feel a connection with a brand, then it will fail to make it into the consumer's consideration set.

The choice of brands within today's market has grown exponentially over the years. Due to this, the expectation and demands from consumers will only continue to increase. This is one of the core reasons as to why brand has evolved from a purely communications-led concept to one that needs to run through the very heart of every organisation. Ultimately, it's the customer journey that is now acknowledged as defining the brand.

It's with this backdrop in mind that CIM (The Chartered Institute of Marketing), supported by Brandworkz, commissioned this report to identify key areas within organisations that most urgently need tackling in order to enable marketers to deliver on their desired brand experience.

**These are the results.**



## Research focus

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Consumers see brands as seamless entities that should meet, if not exceed, their expectations. Brands that don't deliver this joined-up, consistent brand experience risk breaking customer promises – and in a competitive marketplace, that can spell disaster.

It's no secret that achieving this is a struggle for many organisations, which is why we decided to delve deeper and explore where exactly the blind spots, inconsistencies and challenges are that can result in a dysfunctional brand experience.

In late November/early December 2015, we surveyed over 2,200 marketers across a wide range of sectors and seniority, focusing not just on the UK, but also globally. We asked them in-depth questions that were analysed to bring you this report, which aims to provide a holistic view of what companies are getting right, what they're getting wrong, and ultimately what needs to be improved to avoid a disjointed brand experience in the eyes of their customers. The main issues surround leadership, translation and influence.

Without positioning the consumer at the heart of the brand via a smart strategy that is led from the top, and is clearly understood, developed and delivered by people from every touchpoint of the organisation, then nobody wins - least of all the brand.



we surveyed  
**2,200**  
marketers

# Executive summary

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## 1 Challenges and opportunities

Culture, resources and internal priorities pose the biggest internal challenges to marketers when it comes to delivering on their desired brand experience. Externally, competition is considered the biggest obstacle.

Customer experience is overwhelmingly believed by marketers to be a stronger driver of brand performance than communications. Yet this is an area in which organisations are falling behind.

## 2 Perspectives on brand within the organisation

While marketers see the delivery of the brand promise as cross-functional, the grasp that different departments have on their role in delivering this promise to customers is poor.

Fewer than half of marketers feel that employees understand the vision and direction for their brand.

## 3 Culture

Not enough employees are involved in helping to build the brand or instinctively act in ways that embody the brand promise.

In many organisations, employees have little knowledge as to how to deliver the brand promise to the customer – not surprising given the serious disconnect between internal brand culture.

Inductions and recruitment are particularly lacking, and a worryingly low number of organisations have any internal brand champion or ambassador programme outside of marketing.

## 4 Sharing and communicating on brand issues

Not enough organisations communicate effectively on brand. Too few employees are given the opportunity to suggest ways to improve the customer experience.

Employees care about customer insight, but it's not being shared within the organisation.

## 5 Leadership

Marketers feel confident that brand is a high priority for the entire company and a consideration in major organisational decisions. However, the level of commitment from senior leadership in reality is questionable since the strategic role of brand isn't fully understood,

and brand is not making it onto the board agenda or being discussed at a higher level.

What's more, there's a lack of coherence internally amongst leaders when it comes to brand.

Leaders often lack understanding around what brand means for their department.

## 6 Marketing influence

The marketing team isn't well respected within many organisations, nor does it have a strong enough influence on other departments. Moreover, the team lacks representation in decision-making on many cross-business initiatives.

There is a lack of alignment between the brand promise and strategic vision in too many companies – an issue that is up to marketing to drive.

## 7 Measurement

Measurement is a key area in which marketers are missing a trick, with many failing to measure the right metrics of success, reward where appropriate, or share the results of brand and customer performance measures throughout the organisation.

# Main findings

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## 1. Challenges and opportunities

**Culture, resources and internal priorities pose the biggest internal challenges to marketers when it comes to delivering on their desired brand experience. Externally, competition is considered the biggest obstacle.**

Our findings highlight the challenges that marketers are concerned about impacting their organisation's ability to deliver an integrated and consistent brand experience. Internally, budget and resource pressures are considered the principal barrier, cited by 65% of marketers; whilst in second place, competing internal priorities are named by 58%. In third place is the organisational culture, which is considered a concern by half of marketers.

Also notable is the 40% of organisations identifying organisational design as an issue, supporting our belief that traditional structural paradigms and internally-oriented silos can be counter-

productive in the pursuit of a customer-oriented agenda, and a single view of the customer journey. Then there's the fact that leadership's understanding of the role of brand is seen as problematic by almost half of marketers, a challenge reflected elsewhere in this report.

Competition dominates the list of external concerns, with 63% of organisations citing this as a major issue. Whilst competition can be a general worry, a key reason for branding is differentiation, begging the question – why do marketers see competition as a barrier to deliver brand experience?

Surely competition should be a driver for an organisation to develop a strong brand and deliver on it?

Changing customer needs and behaviours are also an issue for almost half of marketers. Given the disruptive context that most industries are facing, we're surprised this number isn't even higher. We also expected the impact of social media on brand reputation to be raised as a concern by more than a

quarter of marketers, given the limited gestation period these channels have had in relation to other technologies.

**Customer experience is overwhelmingly believed by marketers to be a stronger driver of brand performance than communications. Yet this is an area in which organisations are falling behind.**

Four out of five marketers told us that experience is a stronger driver of brand performance than communications, which is consistent with our expectations and similar data from CIM's previous research into this area (Merging Promise and Experience, 2012). Yet only around half of organisations claim to be leading in their sector, or delivering their brand promise consistently across the whole customer experience. Furthermore, despite the huge emphasis placed on experience as a greater driver of brand performance than communications, the difference in capability between the two is negligible.



4 out of 5

marketers told us that experience is a stronger driver of brand performance than communications

## 2. Perspectives on brand within the organisation

**While marketers see the delivery of the brand promise as cross-functional, the grasp that different departments have on their role in delivering this promise to customers is poor.**

We asked marketers to what extent other departments impact the delivery of their brand promise through customer experience, with respondents clearly supporting the assertion that delivering the brand promise is a truly cross-functional undertaking. Among the departments seen as having the highest impact are customer service and senior leadership team, followed by corporate communications, sales/business development and operations.

However, the understanding each department appears to have of their role in delivering the intended brand

experience to customers leaves much to be desired. Most notably, barely over half of marketers believe their senior leadership team have a high understanding – a worrying number, given that it is this group/committee that ultimately 'lead from the front'. If alignment is wrong at the top, it's got little hope of making an impact when it reaches the front lines.

When we looked at those who said these functions have a high impact on delivering for customers, and whether they're felt to have a high understanding of the role they need to play, some worrying gaps emerge. In particular, HR (from an internal brand perspective), customer service and the senior leadership team are those of most concern – with 28% (HR), 58% (senior leadership) and 58% (corporate communications) of marketers saying those departments have a high understanding. It's clear that there is a strong internal communication

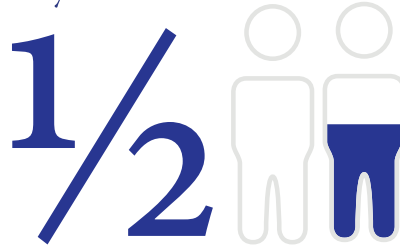
and buy-in effort required by many organisations.

Less than half of marketers feel that employees, at all levels, understand the vision and direction for their organisation and brand – supporting the urgent need to get back to basics. Employees don't respond well to a lack of clarity or direction. They need to be crystal clear in their understanding of the road map for their brand if there's any hope of the organisations goals ever being reached. The finding also supports the need to focus from the top of business, where this journey must start.



barely over half of marketers believe their senior leadership team have a high understanding of brand

only around



of marketers say their organisation embraces the role of all employees building the brand

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### 3. Culture

**Not enough employees are involved in helping to build the brand or instinctively act in ways that embody the brand promise.**

Only around half of marketers say their organisation embraces the role of all employees building the brand. Whilst some may argue that brand isn't something which can be democratised or opened for any amateur to tinker with. We would assert that there is no part of an organisation – not one department or individual – which doesn't in some way contribute to creating value for the customer. To disregard certain individuals will distance them from their role in delivering for customers and can only be counter-productive.

The same number – only around half – of marketers believe that their employees' values and behaviour are intuitively aligned with the brand promise. This issue goes to the heart of brand culture – and the previously reported low engagement of HR is a further contributing factor.

**In many organisations, employees have little knowledge as to how to deliver the brand promise to the customer – not surprising given the serious disconnect between internal brand culture.**

Most troubling, but not unexpected given the low levels of leadership alignment seen in other areas of the report, is that little over a third of marketers believe that all employees understand how they deliver the brand promise to the customer, and their role in doing so. This is more than just an internal communication challenge

– it requires leadership, translation and training.

Also, consistent with other parts of the report, only around half of marketers' state that there is alignment between internal brand culture, and external brand values on which customer promises and experiences are based. There simply cannot be a disconnect between internal and external brand values. They may be articulated differently, but unless they're of the same essence and rooted in the same purpose, gaps between external promise and the ability of internal teams to deliver on that will always surface.

**Inductions and recruitment are particularly lacking, and a worryingly low number of organisations have any internal brand champion or ambassador programme outside of marketing.**



Only a quarter of marketers say that brand features prominently in employee inductions – a credible contributing factor to the lack of understanding and buy-in amongst employees to their role in delivering the desired brand experience. The old adage of 'catching them early' applies here. Getting first impressions about brand right early on in any employee experience is far easier than trying to correct behaviours which have become ingrained over time.

More than a quarter of organisations have no link between brand values and recruitment – missing a major opportunity to bring people into a business that will promote a brand culture. In addition, almost half state that brand only plays a part in certain roles, brands or businesses. If all parts of an organisation play a role in delivering value to customers, then they should be aligned with brand values and culture. You wouldn't expect to hear a CEO

saying, 'This is the kind of company we want to be, but we'll let it slide for some of you.'

When asked if their organisation has an internal brand champion or ambassador programme outside of marketing, almost three-quarters said either 'no' (68%) or 'yes', but it has little positive impact (15%). Given the cross-functional nature of brand delivery and its reach across functions, it's surprising that so few organisations seek to create and leverage a network of authentic evangelists outside of marketing, to ensure reach and ongoing reinforcement of messaging.

Deeper analysis strengthens these assertions. A cross analysis of respondents' answers looked for a connection between those marketers who report that there is a strong understanding amongst employees

of their role in delivering the brand customer experience, and whether or not employees receive detailed instructions on brand when they join – we found that was indeed the case. Another cross analysis looked for a connection between those marketers who report a strong understanding amongst employees of their role in delivering brand customer experience, and whether or not brand values and culture play a role in recruitment – again, we found that was the case.

only  
1/4

of marketers say that brand features prominently in employee inductions





more than

**3/4**

of marketers believe that their employees care about customer perceptions

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## 4 Sharing and communicating on brand issues

**Too few organisations communicate effectively on brand.**

Few organisations have moved beyond the 'easy' or 'passive' communication tools of email and intranet, to leverage technology and education/communication opportunities to help engage and align employees with the brand. No wonder that elsewhere in the report we found such a serious lack of understanding among employees around the vision and direction for their brand.

**Not enough employees are given the opportunity to suggest ways to improve the customer experience.**

Despite the recognition at the outset of this report on the cross-functional nature of delivering brand experience, less than one in five organisations have a closed-loop process to encourage employees to contribute to improving the customer experience. We view this as a missed opportunity which only goes to support silo working practices and is unlikely to be supportive in the development of a brand culture.


This assertion is backed up by our cross-analysis which looked for a connection between those marketers who report that all employees understand the vision for the brand, and whether or not they close the feedback loop and engage employees in customer experience improvement initiatives. We found that is indeed the case.

**Employees care about customer insight, but it's not being shared within the organisation.**

More than three-quarters of marketers believe that their employees care about customer perceptions. However, this apparent customer passion isn't being enabled, with much improvement needed in internal communication and alignment.

In fact, as champions of the customer agenda within an organisation, a key tool at a marketer's disposal is data and evidence from market and customer research. Yet few are sharing this consistently with key internal stakeholders. In doing so, marketers are arguably missing an opportunity to influence the rest of the company when it comes to the customer experience. Particularly concerning is that only 13% of marketers say they consistently share this with their agency partners.



only  
**48%** 

of respondents believe their leadership team, HR, corporate communications and marketing departments all speak about the brand with one unified voice

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## 5 Leadership

**Marketers feel confident that brand is a high priority for the entire company and a consideration in major organisational decisions. But the level of commitment from the top in reality is questionable since the strategic role of brand isn't fully understood, and brand is not making it onto the board agenda and into the right conversations.**

Positively, around three-quarters of marketers believe that brand is a consideration in major organisational decisions. And around two-thirds believe that their organisation would stand by their brand even if it meant not pursuing a business opportunity. Similarly, almost two-thirds of marketers say they believe that senior leaders place an importance on brand as an organisation-wide concern.

But we would assert that this is empty rhetoric in the face of the low levels of

shared understanding and buy-in being widely reported in this survey. Particularly worrying is the fact that despite the perceived organisational commitment to brand, there's a feeling amongst marketers that senior leaders still don't fully appreciate the strategic role and potential of brand, and are limiting their definitions to its communications-focused role. Indeed, 67% of marketers agree this is the case. Of equal concern is our finding that only around a third of marketers believe that brand performance and brand-related metrics are being discussed at senior levels.

**What's more, there's a lack of coherence internally amongst leaders when it comes to brand, with little understanding around what brand means for their department.**

Over a third (39%) of marketers report that the leadership team, HR, corporate communications and marketing departments are failing to speak about

the brand with one unified voice. This reveals an insufficiency of coherence amongst different business departments when it comes to brand, though this is to be expected given the low levels of reported understanding across the organisation.

In fact, less than half of marketers believe that leaders understand what brand means in their part of the organisation – suggesting an awful lot of work is needed to translate brand ideals into something tangible and meaningful for different business areas. We'd contend that this is at the root cause of many issues facing marketers – because of the cascade from leaders down the organisation, if the direction is misaligned to start with, it is unlikely to course-correct further down the line.

**50%** agree that their leadership team use the brand promise or positioning to guide their decisions making



of marketers say they consistently measure brand, customer-related and non-financial metrics of success

## 6 Marketing influence

**The marketing team isn't well respected within many organisations, nor does it have a strong enough influence on other departments. Moreover, the team lacks representation in decision-making on many cross-business initiatives.**

Little over half of marketers believe their function is well respected within the organisation, and around the same amount believe that marketing has an influence beyond communication. This is brought into sharp and concerning focus when we analyse the nature of marketing involvement in a range of key cross-business initiatives. Indeed, focusing just on those reporting a consistent involvement, the most troubling are NPD, new market entry, corporate strategy and corporate values/culture change programmes.

Four out of 10 marketers acknowledge a lack of alignment between brand and the strategic vision of the organisation, which is more than concerning – especially as, we'd contend, it's down to marketing to drive this.

## 7 Measurement

**Measurement is a key area in which marketers are missing a trick, with many failing to measure the right metrics of success; reward where appropriate; or share the results of brand and customer performance measures throughout the organisation.**

Adding some colour to the earlier data which showcased the low number of organisations discussing brand performance and brand KPIs at the most senior levels in their organisation, our findings reveal that less than half of marketers admit to consistently measuring the right non-financial metrics in the first place. So even if the conversations at board level were taking place, there would be nothing robust to share anyway.

And despite much progress in loyalty measurement, less than half of marketers feel equipped to measure the impact of brand experience on business value, making internal and commercial conversations ever-more challenging.

Rewarding and valuing brand and customer-related non-financial measures of success is another area

beset with problems, with only four out of 10 marketers rewarding brand and customer-related KPIs. The old adage 'what gets measured, gets done' applies here – integration of brand and customer objectives into personal objectives for employees and even remuneration policy is a useful tool of aligning employees' interests and priorities, but overlooked here by most.

When we asked marketers exactly which brand and customer-related metrics their organisation does track, 51% measure brand awareness (people have heard of us), but less than half measure brand preference (people actually choose us). Almost the same figure (50%) measure employee satisfaction (people are happy with working conditions), yet only a third measure engagement (people are committed to the role they play). And whilst 71% measure customer satisfaction (we're OK to do business with), only about half as many measure perception (what customers really think about us).

And worryingly, only 40% of organisations are sharing the results of brand and customer performance measures sufficiently to their teams to support the ambition of shared priorities and alignment around common brand goals.

# Conclusions and recommendations

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## It starts at the top

The phrase 'getting the board on board' may seem a little clichéd, but our latest research data suggests that many efforts to improve brand and customer experience performance may be ill-fated from the outset due to a lack of leadership buy-in and understanding.

Despite the fading away of 'it's more than just a logo' argument, we appear to still lack shared understanding of the strategic role and potential of brand. Two-thirds of marketers believe that their senior leadership team see brand as a tactical, communications or identity-focused concept, a much narrower definition than its potential, and only half believe their leadership team use brand promise or positioning to guide their decision-making.

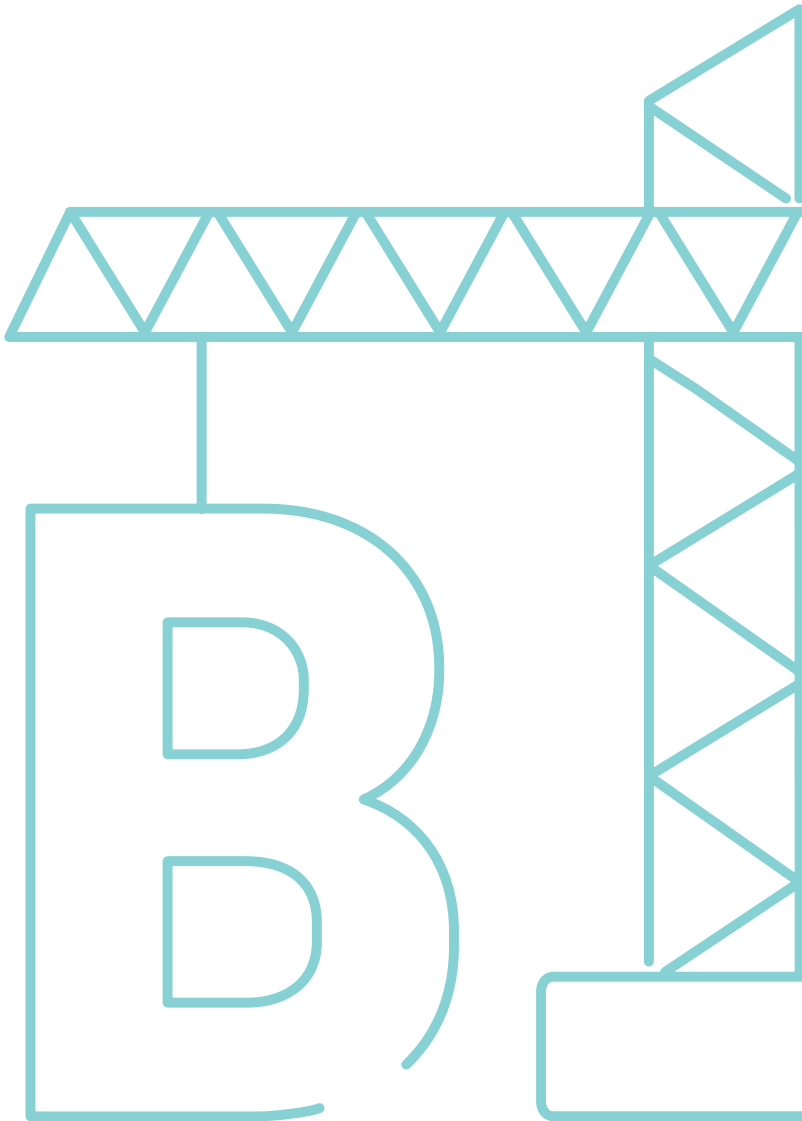
Ultimately, if there's a lack of congruence between marketing's belief in brand and the remit that the organisation places upon it, its potential will be limited from the outset.



recommendation

one:

“ marketers need to agree a clear mandate for brand within their business, and invest time in gaining consensus on this ”



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## Clarity around the brand promise

Worryingly, there is a lack of understanding as to what the brand promise means across the organisation – and this begins with leaders.

Under half of marketers think that leaders understand what brand means in their own part of the organisation, not just at a corporate/theoretical level. This means much work is required to turn brand ideals into a reality and to make them meaningful across different business areas.

We think this problem sits at the very heart of many brand issues facing marketers and without the leadership’s clear direction on this, nothing is likely to change further down the organisation.

recommendation  
**two:** “ marketers need to secure collective buy-in from leaders, translating what brand vision and brand priorities look like for both functions ”

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## Permeating the organisation

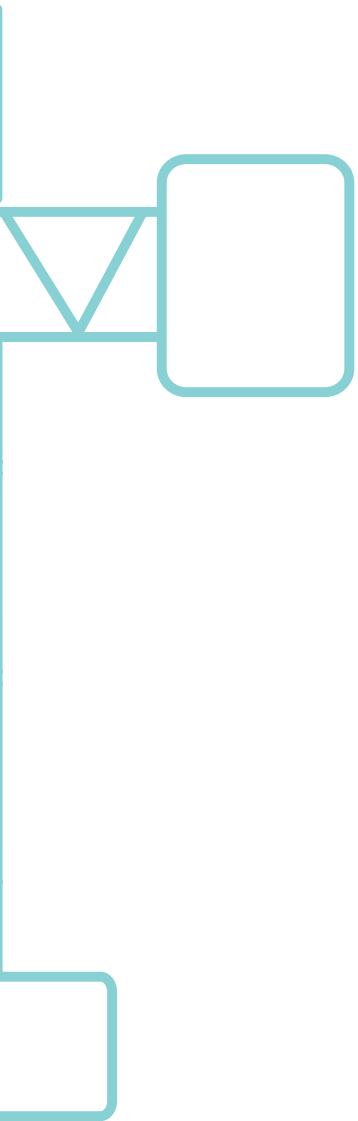
Bringing brand promise and values to life consistently across all parts of a customer experience is an inherently cross-functional endeavour, not the preserve of any single one.

Indeed, in our survey the majority of marketers said that their customer service, sales/business development, operations, corporate communications and senior leadership teams had a particularly high impact on delivering the brand experience. But when asked whether these same functions understood their role in delivering the intended brand experience to customers, some worrying gaps emerged.

We found that little over a third of marketers believe that all employees in their organisation (regardless of level) understand how they deliver the brand promise to the customer, and their role in doing so. Only half of marketers believe that their employees' values and behaviour are intuitively aligned with their organisation's brand promise.

To understand where there might be an opportunity to improve this, we looked at three practical steps marketers can take to build a stronger understanding of brand at all levels in the organisation: inductions, recruitment and having a brand ambassador (or similar) outside marketing.

We found that those organisations who invest in these three initiatives tend to significantly improve employee understanding of brand experience and their role in delivering it.



recommendation

**three:** “ partner with HR to integrate brand much more closely into people and change initiatives ”

## Being part of the right conversations

Our research shows that marketers are lacking data, influence and the presence in key business decisions.

Little over half of marketers believe their function is respected within the organisation and around the same think that their marketing team has a strong influence on what other departments do (beyond just communications).

We looked at 10 major organisational decision areas ranging from culture change to NPD, and found that marketing's involvement is inconsistent at best and, in some cases, isolated. These areas aren't aspirational, yet all have implications for brand and customer value, and should take the brand proposition and customer voice into consideration.

recommendation  
**four**:

“ rather than banging on the door asking to be let in, marketers need to identify specific instances where they have something to bring to the table – be that in the form of customer insight, market or competitive intelligence, or brand performance data ”



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## Creating more meaningful measurements and sharing the results

Our research found brand measurement to be a significant area of weakness. Less than half of marketers feel equipped to measure how the quality of their brand experience impacts business value. This is in spite of much progress in the field of measurement, analytics and supporting technologies, and can only serve to make internal and commercial conversations ever more challenging. Less than half of marketers believe their organisation consistently measures brand and customer-related non-financial metrics of success. This relegates any brand performance measurement to a tactical level.

So we looked specifically at what marketers are actually measuring in relation to key brand KPIs, and what's done with the insight these generate. Put simply, most organisations are measuring what's easy, not what counts.

Moreover, few organisations are sharing the results of brand and customer performance measures internally. No wonder that only around a third of marketers say that brand performance and brand-related metrics are regularly discussed at the most senior levels.

“ partner with finance, IT and customer services to develop a dashboard of brand KPIs which go beyond the easy metrics and, more accurately, help understand how the brand is being delivered across the customer journey, as well as the effect this is having on value. Make sure this dashboard has longevity so that data can be viewed over time and trends/forecasts extrapolated. Finally, make sure this information is shared regularly, in a structured way and with as much transparency as possible ”

recommendation  
**five:**

# About the companies behind this initiative

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## **CIM**

### **(The Chartered Institute of Marketing)**

For more than 100 years, CIM has been supporting, representing and developing marketers, teams, leaders and the profession as a whole. Our networks have an unrivalled breadth, depth and diversity – making this not just the largest community of marketers, but one with impact. We're independent, trusted and connected, with access to unmatched ideas, insights and resources to help marketers navigate from problem diagnosis to practical solutions.

Our vision is for marketing to be recognised as playing a pivotal role in business – constantly harnessing, integrating and acting on collective intelligence. And our role is to be the catalyst of that.

For more information visit:

**[www.cim.co.uk](http://www.cim.co.uk)**

## **Brandworkz**

Brandworkz is a brand experience management platform. It is the central hub of your marketing ecosystem that enables brand, marketing, customer service and any other internal teams to deliver a unified brand experience.

There can be a disconnect in communication between internal teams within companies which means the brand promise sometimes doesn't get as far as the consumer and their brand experience is not consistent.

### **Brandworkz solves this problem by enabling businesses to:**

- **Promote & educate** by aligning internal teams behind the brand promise
- **Share & distribute** the right content at the right time with industry-leading digital asset management
- **Govern & automate** by enhancing marketing processes to enable consistent brand promotion

For more information visit:

**[www.brandworkz.com](http://www.brandworkz.com)**



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