

Branding Best Practices – for Businesses

Gerry Lewis:

Welcome to another episode of GLINC Outside the Box. I'm Gerry Lewis.

Now, I don't know about you, but I'm always impressed and fascinated with great branding and marketing ideas. And perhaps it's because in my line of work as a change communicator, we too are always looking for ways to differentiate ourselves and to have our messages stand out, to capture our audience's attention and to ultimately encourage them to make decisions towards action. That's what great communication does. Our podcast today explores the ever evolving world of branding and marketing and how they can help organizations reach your wider audience, differentiate you from your competitors, and keep you top of mind when deciding to purchase or to engage.

Today, effective branding requires a multifaceted approach that encompasses not just messaging and design, but also social media, content creation, and influencer outreach. Marketing strategies must consider not just traditional advertising channels, but also digital marketing, search engine optimization. So in this podcast we'll explore the ins and outs of branding and when is the right time to consider rebranding to drive renewed growth and expanded reach.

So joining me here today is someone I've known since my days at university. And let's just say that goes way, way back. When I have a brand or marketing question, there's no one else I go to for advice than Lisa. Lisa Chicules is a guru in this area and has over 25 years of experience in branding and marketing as well as organizational strategic planning across multiple sectors. Now, prior to running her own consulting firm, she's held numerous senior executive positions in the world of advertising and marketing, corporate and not-for-profit sector. Lisa's sitting down with us today to talk about how branding and marketing have evolved and merged over the years and how we can navigate through the multitude of great ideas and best practices to help us become savvier when it comes to giving our brand an authentic voice. Welcome, Lisa.

Lisa Chicules:

Thank you, Gerry.

Gerry Lewis:

Lisa, we often use the terms branding and marketing interchangeably, and I know we shouldn't. So let's start with talking about the difference between branding and marketing as a level set.

Lisa Chicules:

No problem, Gerry. Absolutely, and there is confusion because we do tend to use a lot of different terms interchangeably, but for me, branding is defining who you are, what you stand for, and the impact you want to have on the lives of those you serve. Whereas marketing is about telling the story, telling that story in a way that resonates with your audience and inspires them to action.

Gerry Lewis:

Great delineation between the two, Lisa. And in fact, when we talk about, I think brands is used a lot and in sort of conversation. And then recently I was pulled on LinkedIn on what are some of the most recognizable brands you can think of. So just for fun, I played along and I put Google, Apple, Amazon, Nike, Visa. Just those are the brands I think about. But it struck me as we talk about branding and marketing that often people associate brands with logos and we probably shouldn't be doing that, should we? So let's talk a little bit more about brand if we will.

Branding Best Practices – for Businesses

Lisa Chicules:

Yeah. Gerry, it's very common to think of the brand as a logo. So I might be working with a client and say, "Oh, we want a new brand." And what they're asking for is a new logo or a business card or a website. All of those brands that you mentioned, Google, Apple, Amazon, Nike, Visa, they're amazing brands. The logo is really brought to life by the brand that they are and how they speak to their customers and the service that you get and the products that they provide. So it becomes part of the brand, but it isn't just that.

So I can talk to you a little bit about different definitions of brand and how it really goes beyond the logo. So a brand is a perception or emotion maintained by somebody other than you that describes the total experience of having a relationship with you. This is from Seth Godin. Or Jeff Bezos said, "Your brand is what people say when you leave the room." I think it's kind of a funny one. So for example, think about a movie you've seen, a restaurant you went to, a computer you purchased. When a friend or colleague asks you, "What did you think of that?" Your response is actually how you feel about that brand, that experience that you had. And when you share your response, it is what we call word of mouth marketing, a really powerful tool. I mean, think about something like TripAdvisor or where we go online to get recommendations.

So to define a brand, you need to define kind of what's unique about you, what is it that you are offering to your customer? So I really start with kind of those you serve. Who's your ideal client, customer, target audience? For me, this really puts me in the right mindset. A mistake people and organizations can make is to talk about themselves. It becomes a monologue, not a dialogue. Think about everyday life. You know that person, this wasn't our experience, Gerry, that you meet for the first time that only talks about how great they are. Never asks you about you, what your needs are, your hopes and dreams. Not sure you're going to hang out with this person again. It's the same with brands.

The brands need to establish a dialogue with their customer, their donor, their employee. It needs to be about those you serve, understanding the problem they are desperately trying to solve, which actually gets us into the mindset of empathy. And this is where the brand comes in. What can we do to uniquely solve their problem? What can we do that no one else can? And we do that with them. This makes sure the agency stays with them and the brand is more of a guide and a catalyst.

Gerry Lewis:

That's fantastically. So I love the two definitions by the way in terms of what is the perception and emotion and is what people talk about when you leave the room. I really also like the fact that a brand sometimes can feel like a monologue that is just telling you how great they are. But without really truly understanding that client experience, it's not a dialogue. So it's just a bunch of tell. And yes, we have met people in networking situations that just tell you how great they are and those are the people we do not connect with afterwards.

It's interesting, I just realized I spent a lot of time on LinkedIn because something else just popped up on my LinkedIn this morning and it was about, the title was Building a Superstar Brand. So it was a bit of a promo piece. But there was one line that I thought really resonated with what you just said about value proposition. It said know what you bring to the table that nobody else does. And I think that speaks to exactly the value proposition you're talking about in terms of the brand, the story, and what is that dialogue you're trying to have. So let's switch gears then. If that's what brand is, it's having that sort of conversation, it's about that perception about the value proposition dialogue, not monologue, and who you serve. Let's talk about marketing, which is about telling that story. Tell me a bit about that.

Lisa Chicules:

Branding Best Practices – for Businesses

Yeah, so for me, Gerry, the brand comes first, defining kind of what your brand stands for, who you serve, that problem statement, and then how can you uniquely solve that problem. That all together creates your unique value proposition or your unique point of difference. For me, marketing is about bringing that story to life, bringing your brand to life, telling that story in a way that resonates with your audience, those you serve to inspire them to take an action. So that could be to learn more, to buy now, book an appointment, volunteer, donate, apply for a job here.

So when you're thinking about the difference between the two, **branding is that strategy that you create what you stand for and marketing is how you bring it to life**. And then it doesn't really stop there after you've made the sale. Sometimes people make this mistake and we've all had these experiences, we buy into this story, it resonates with us, we purchase the product or we volunteer for the organization or we take that job and then we get there and we don't have a great experience, right? So I've bought something that doesn't work. They were great on the sales, but the customer support follow up, no one answers the phone. I mean, we've had those experiences.

You can think about that job that you took where, "Wow, in the interview it all sounded great, but when I got into the role it wasn't at all what I expected." So it's really important that your marketing and that brand experience, that there's an authenticity there, that it's the same because that's how we build that loyal customer base. I mean, just talk to an Apple user or any original Blackberry user like myself who desperately did not want to give up that phone because I loved the keypad, or your favorite restaurant or that ideal company that you work for and you always think about, "Wow, maybe that was the job I shouldn't have left because it was such a great experience." So we want to make sure as we're defining the brand and then as we're bringing it to life, that we're closing the loop to make sure that we're building a consistent brand experience that can really last a lifetime.

I don't know about you, but I have some brands in my life that I've purchased them over and over and over again because that customer experience, I'm never disappointed. It's reliable. We know as marketers and as business owners, it's a lot less expensive to keep a client than it is to find a new one. I think researchers have figured it out. I just came back from a trip and Eric Canada sent me a survey and really the key question they're asking on surveys is, "Would you recommend us to a friend?" So it's what they call a net promoter score, but that really tells you everything. I don't know about you, but if someone's saying, "Hey Lisa, I'm thinking of selling my house, do you have a real estate agent you'd recommend?" That recommendation, it is worth a million dollars in advertising, right? So again, I think the research companies are getting it too. That recommendation that's saying "Yes, I'd recommend it to a friend" is critical.

Gerry Lewis:

Lisa, I love so many things. I love what you say. That's why you're my guru by the way. In terms of marketing, in terms of building that brand experience that provides lifetime value, I think that is so important. There's a lot of companies, Lisa, out there that are doing some form of rebranding, whether it's a full rebrand or as many organizations are calling it, a brand refresh. What would you say or why would you say there's so many companies thinking about that right now?

Lisa Chicules:

Gerry, it's a really great point, and I would say it's really been driven by the pandemic. Think about normally people look at rebranding when there's been some sort of change, a market dynamic. Maybe there's a new competitor, maybe their customer has is in a different life stage, or you have a new product to launch. But as a world, we've gone through an incredible global change. Two years is a long time. I've noticed habits have changed, needs have changed, and available choices have changed. Some

Branding Best Practices – for Businesses

of my favorite restaurants aren't available anymore, or the way I shop is different. And then not to mention an additional economic uncertainty with the financial pressure with interest rates, some of our customer buying power might have been shifted, or their needs have changed through the pandemic. Maybe they've downsized, maybe they've simplified their lives, maybe they lived somewhere else.

So what was important to them that that problem they were desperately trying to solve may have shifted. So I think what's happening right now is organizations are realizing that and they're taking a look to see if their brand strategy is still relevant. The good news is the questions don't change. Whom do you serve? What is the problem they're desperately trying to solve and what can you do that no one else can to solve it? And in this case, Gerry, I mean I think we talk about brands, but also thinking about the workplace. We've seen a lot in the news about quiet quitting or people going to organizations and not staying because people have really started to reevaluate the role that work plays in their lives and that thing we're all chasing of the work-life balance. So if you want to retain your team in a top talent, what do they need to be successful today?

And Gerry, in working with you, I believe you've found the secret sauce, like the key in your organization. I think it's going to be announced soon that your organization Gerry Lewis Inc was named one of the top 10 organizational change services in Canada for 2023 by HR management. What I see that you've just done a brilliant job of understanding the needs of your employees at an individual level, providing the support that they needed to transition and be supported during the pandemic, involving them in decisions that affect them, which we know is a key to building trust, and then providing a work environment that's flexible based on their unique situation. I think you're a great example of a brand and an organization that said, "Hey, I need to rethink the workplace experience." I mean, I just think you've done a terrific job.

Gerry Lewis:

Lisa, first of all, thank you for that incredible shout out for that award we are about to get. So thank you very much for that. I have to credit this to my team, not just me because it's my team that feel comfortable enough to talk to me about some of these changes that would then trigger for me to say, "What are some things I need to rethink and redo in terms of making it a better place to work?" So thank you for that. A reason for change or change that's happened, you mentioned the pandemic. Certainly I think that really changed a lot. The workplace has changed. It's about when it's time for a change is when we think about rebranding, refreshing that sort of brand. So let me ask you, if I were to say, "I want to refresh my brand, I'm interested in rebranding' as an exercise, where do I start?"

Lisa Chicules:

Well, Gerry, it's one of those things where you kind of start at the beginning, really sitting down and understanding what is the problem that you're trying to solve. And Gerry, I use a similar process that you use. I kind of have four stages; discover, define, design, and deliver. You have a similar process. And really it's just understanding the why behind the need for change. So this is the time that you take to really do a thorough analysis of your business. Where are the sales right now? Is revenue up? Are engagements up? Are they down? Have I retained my loyal customers? Are my customers needs changing? Are they reaching a different life stage? Maybe they're entering into retirement. And by that, they might be looking for different types of products or they have different needs. Are there any new competitors that have entered the market? They might have some better or different product offerings. And I need to stay on top of those things to remain relevant.

And as we talked about earlier, I'm able to attract and retain great people. I can't do this alone and we need really that great team around us. What I'd say here too is we kind of need to park our ego when

Branding Best Practices – for Businesses

we do this. You need to be humble. You need to be open to what the data and the insights are telling you. I've worked with many clients as a consultant. You can do the research. It's almost they start to challenge it because the change becomes a bit scary or there's comfort in staying in the status quo.

I'll give you an example. When I worked with the Heart and Stroke Foundation, I was new to the organization and took a look at kind of their business results over the past five years. And because they were looking at expected growth numbers and maybe they had put in an aspirational target, people weren't really looking at the year-over-year revenue numbers. And it became clear to me, and again, a fresh perspective helps, that the business was actually in a five-year decline. We were losing business to cancer charities. They were raising a lot of money.

Now in this sector, all causes are important and good and valuable, but when you start to see that the revenue is not there, there's time for concern. Can we invest in the research we need to keep Canadians healthy? So we needed to understand why. What was the problem we're trying to solve? The brand was well respected. People knew Heart and Stroke Foundation, they trusted it. That wasn't the issue. But through doing some research, what we uncovered is that the disease, heart disease and stroke, was no longer seen as urgent and relevant. People were much more afraid of cancer.

So with this understanding, we were able to develop a brand and marketing campaign that resonated with our core demographic, our boomer audience, and we were able to make heart disease and stroke urgent and relevant to them. The great news is that the result was we were able to increase revenue by 20% where it was integrated. Someone once said to me, "A problem well-defined is half solved." And I think taking that time upfront, and I know we're impatient, I know we just want to get to the answer, I know we want the solution, but if we don't take the time upfront, we're going to waste a lot of time on the back half kind of redoing the solution or reanalyzing. So probably one of my difficult jobs as a consultant, I'm sure you experienced this too, Gerry, is the patients required to do the work you need to do upfront, which we know is going to save a ton of time later on.

Gerry Lewis:

Lisa, that's great. I'm just going to pause you here because I think that the discovery is such a critical part of this process because very often when we talk about rebrand or refresh brand, we go to solution. What do we want to do? What's going to change? But if we don't take that hard look, and I love what you said about being humble, and that's hard because you're looking at yourself in the mirror and saying, "Where are some of the areas I really need to focus on?" So discovery is key. Let's move to your next stage. You talk about, I believe you said it's defined, in defining the solution. What goes into that?

Lisa Chicules:

Yeah, absolutely, Gerry. So now this is the bit where your branding kind of comes in. So you've defined the problem. Now how are you going to solve it? I'll share this through an example and one that I think might be close to your heart because I know you've got extensive expertise working with banks. So I worked on the Scotia Bank business when I was in the advertising industry. We were given a challenge to come up with a new product to help Canadians manage their contribution room, which by the way, at the time, I had no idea what that meant for their RSPs. And again, we asked similar questions. So what is the need for the change? Why do we need to create this product? Well, many banks were offering similar loans to Canadians to help them kind of close that gap, their contribution room for their RSPs.

With Scotiabank, what we needed to do for them was how could Scotiabank uniquely solve that problem? It's not easy in the banking industry because it's highly regulated. So the product is kind of determined. There's no real technical advantage. However, how we talk to those we serve, our customers, and how we bring it to life, the brand, was completely open and provided us with a

Branding Best Practices – for Businesses

wonderful opportunity to create something quite unique at the time. So we delved into the customer mindset, what's the problem our customer's desperately trying to solve. And through our research we discovered the Canadians did want to put more money into their RSPs, but they found it overwhelming. Finances were a point of stress, and they didn't really fully understand their options.

So basically what we said to them is, we created this product, we called it the RRSP Catch-Up Loan, how to catch up on Your RSPs. So really simple. We didn't use language like contribution room. People understand this need to catch up, and they were feeling behind. It was such a simple name. When we started to talk to customers about it, we saw them relax. You could feel like it was actually possible to save for retirement, and it was a hugely successful product for them.

Gerry Lewis:

Lisa, I had no idea, and I've known you for a long time. I had no idea that you were a part of the RSP Catch-Up Loan slogan. I think that's fantastic. I think that's exactly as you described it, it was in their terms and everyone wants to catch up. And the possibility to catch up I think is what made it such so successful. I did not know that. See, there are things I still don't know about about you after so many years. Take me through the next stage. What's your next one? How do you actually bring it to life then?

Lisa Chicules:

Yeah, so the design stage or the marketing part. So now you have the idea. So now we had... I'll use Scotiabank, I'll continue with that. How do we bring that to life? What's that marketing strategy? How are you going to tell your story? We created an integrated marketing campaign. At that time we did TV commercials, which you would now do videos. I mean, social media isn't where it is now. And it featured people just like them. They were up late at night procrastinating. And this is very timely as we're all in tax season right now. We're procrastinating doing their taxes, pulling out or accessing that file mark taxes, trying to find your receipts, all of that good stuff, and delivered the solution and language that people could understand. So what we talked about, like catching up and we know that this is a stressful time.

So again, building that empathy and understanding. And then in bringing it to life. What was also important was to engage the people at the branch level. Because if you remember back then, certainly... Okay, I can't quite remember if there was online banking back then, but anyway, yet you were definitely going into the branch and meeting with the tellers to talk about the opportunity to create a catch-up loan. And what they did, which I have to say my creative team initially was not happy with, which turned out to be such a great idea, is they put ketchup bottles at their kiosk to spark the conversation when customers came in going, "What's that about?"

"Oh, you want to catch-up on your RSPs? Ha-ha-ha." And it really kind of broke the ice again, made it very accessible and also at the branch level kind of gave them a tool to engage and made them feel part of the solution, which we'll talk about I think in maybe the next section around getting that engagement, getting the buy-in is a really tricky piece of the puzzle. So, so thrilled that the branch staff came up with that idea and that it worked really well for them.

Gerry Lewis:

So we've covered the discovery, which is what's the problem. The design is what's the brand. The design, which is what's the marketing strategy. By the way, I remember the ketchup bottles. I didn't quite use the line you told me. I actually leveraged another organization. I said, "Oh, we're like McDonald's. You want fries with that?" That was a joke. I actually did a lot of catch-up loans. Let's take it

Branding Best Practices – for Businesses

to our final stage. So once we have that, the discovery, the brand, the sort of the marketing of it, what happens next? What's in deliver? What is so important about deliver?

Lisa Chicules:

So deliver is probably the hardest part. I mean, already it's very hard. Imagine we've defined the problem. We know who our customer is, what their needs are. We've come up with a solution, but we now need to implement that in the marketplace through the marketing campaign. And we need to do it in a consistent way. We know today how many messages people are bombarded with. We need to find a way to break through to stand out in that sea of sameness. We're not going to do that if we're shouting a bunch of different messages at our customers in different ways. The most challenging part too is to get your team internally on side to integrate into every area of your business.

And it's critical if you want to have that consistent brand experience. You know that we talked about earlier when you meet that friend, you want to make sure that every time you meet them, they seem like the same person and you're just like, "Wait a minute, it doesn't feel the same. I feel like I'm having a different experience. I'm working with a different part of your bank or different part of your organization and I'm not getting that same experience."

So for me, one of the greatest challenges I've had with any of the campaigns that I've mentioned is really getting everyone on side. And from my experience, it takes time. It takes longer than you think. And as the leader of the project, you need to be super resilient and determined and you need to listen.

So I'll give you an example. When I was working with the Terry Fox Foundation, they were doing their 40th anniversary. This was during the beginning of the pandemic. So it was April 12th, 2020, so right at the beginning of the pandemic. And it was a very tricky time. We were trying to do things we'd never done before. And for such an important cause and a brand, Terry Fox is a person that we really had to respect those values.

When there is resistance, it's important to understand why. So sometimes we can get trapped in, "Well, if I just keep telling them over and over again, I'll convince them." But really we should be asking the question and listening. "So why doesn't this work for you? What is it?" And in my experience, there's an underlying fear, a fear of making a mistake, getting it wrong, disappointing people. It could be as extreme as a fear of losing your job. So we have to remember that these fears are real and that as the leaders of these initiatives, we have to be respectful of those feelings and help them to see the opportunities and give them the confidence to move forward. So I found that certainly having the conversation, identifying those barriers, those fears, and then overcoming them by involving them in the process. Kind of like the branch managers as an example, but also doing some research.

So in the case of Terry Fox, what we did was... And again, remember global pandemic, never been through this before and we're going to go out and ask people for money? That's not right. I don't know if Terry would've done that. So we said, "You know what? Why don't we do a small test? Why don't we spend a little bit of money? And it wasn't a lot to send an email to some of our close and current donors, put a little bit of it on social media and see what happens?" Well, the amazing news is that Terry, as a brand, and the importance of this cause knows no bounds and people wanted us to ask because we were in a time where we wanted to help, we wanted to make a difference. But the results not only told us we were going in the right direction, but it all gave us the confidence to move forward together. And that's critical because to be successful, the team's got to be all working together because it does take all of us to get to those results.

Gerry Lewis:

Branding Best Practices – for Businesses

Lisa, you bring up a really interesting point because we spend so much time and effort in projecting the brand and marketing outwards. So much of it has to do with inwards as well. There's a whole bringing everyone in line aligned to that same message because you can be spending so much money on your advertising and social media channels, but if the internal team is not communicating with that same empathy, that same confidence, it falls short. Something happens. And I think your whole point of Terry Fox and taking that little pilot and making sure people were good with it, built up that confidence internally to give them not just the permission but the confidence to ask. "I'm okay to ask." And I think that's very powerful.

All right, we're always running out of time. So let me just ask you this, Lisa, we talked about so many things in terms of branding and marketing, bringing everyone on site, all towards the importance of finding the authentic voice. That is the whole point of branding and marketing. So my last question to you is one piece of advice you would give to someone who's about to enter into a rebranding project. We covered a lot of really good ground, but what's one piece of great advice you'd like to leave us with?

Lisa Chicules:

I'd say celebrate the wins. Take the time to acknowledge how far you've come as a team. These projects are not easy. Change is hard. It's tricky. People resist. There's risk that people will give up. "Oh, this is too hard. Status quo is so much easier." But as business owners and leaders, we know that innovation is critical to our future success. We need to stay relevant. So I just say take the time to celebrate the wins.

And I'll give you an example. When I was working at the Heart and Stroke Foundation, we launched a new product called the Calendar Lottery. It was a lot of work. So we had two lotteries and then we were launching a new product and we said, "You know what? We're just going to celebrate the fact that we're ready to launch." Just getting the innovation out the door. We didn't know if it was going to work or how successful it would be. Certainly, we did all the research, we had all the right things in place. But you don't know. It's a new product and you can't really test these products in market because with the lottery and gaming corporation, it's complicated. You just have to decide you're going to do a lottery and you have to do it and see what happens.

But we as an organization knew how to evaluate the results. We had done it before and that would come later. So we said, "You know what? We're going to throw a party." And we did. Cake, balloons the whole bit and acknowledged the hard work. And the great news is, spoiler alert it, we sold out in record time and the product grew over the next three years.

So all of the right work was done, but taking the time to celebrate the wins after a launch when you're successful, it's so easy to say, "What's next? We got to keep going," but take the time. When I worked on the Nike business, when you think about training for a marathon, it's kind of like you do the training, you do the performing, and then you have like, "Did you win or did you lose?" But you got to get into the celebration of that. And then you need to recover, take some time before you pressure the team again to do the next big win or the next big launch. You're more likely not to burn out your team and to get the team rallied around that next big opportunity.

Gerry Lewis:

Lisa, I think one of the things in speaking with you and in talking more about rebranding or branding and marketing is that it is truly a journey and there's no one perfect way. I think that it takes a lot of hard work. You talk about the change, you also talked about fear. I think there's going to be a lot of fear when it comes to rebranding because am I making the right decision? Should we be doing this? Celebrating the wins along the way is so important because if you are feeling that fear, imagine your stakeholders, internal and external.

Branding Best Practices – for Businesses

So the ability to kind of continue to believe, know that innovation will never be the wrong move, it's always about innovation and celebrating the small wins allow you to keep that momentum. And who knows? It may be a complete success, it may be a success years from now, but you have to believe in that momentum. So I think that that is one of the things I really picked up from this conversation. Lisa, I love speaking with you. You know that. I just want to thank you for your time today. It is been really insightful. Thank you so much.

Lisa Chicules:

Thank you, Gerry. It's been great. So great to be connecting with you and I'm so happy to be a part of your podcast.

Gerry Lewis:

I also want to thank our listeners. I know it's been a while since we put on our podcast. I hope you enjoyed this one. Happy rebranding everybody. Thank you very much. You've been listening to GLINC Outside the Box. Once again, I'm Gerry Lewis.