DESIGN MANAGEMENT INSTITUTE

Designing dialogues

Customizing communications and communication paths to better engage customers and prospects—and to start and progress relationships

Roger Sametz, President
Sametz Blackstone Associates

By Roger Sametz

Communication strategists, writers, and designers can do much more than just make artifacts of paper and pixels that get "pushed" out into the world. By listening to and learning from constituents, and by reframing communications as an opportunity for creating and managing dialogues that engage customers and prospects, they can plan and implement "customized" communication paths and initiatives that build closer relationships—and deliver increased value to their client organizations.

Fifty years ago, age five, but knowledgeable enough to know that I couldn't let my father embark on this important errand unattended, he and I went to the local Chevy dealer to buy a new station wagon.

I think the intent was to buy one off the lot, but the salesperson gathered us around his desk and explained how the nice folks in Detroit would build one just for us. He suggested that the wagon might fit our needs better (and be a better reflection of our family) if we considered some options. Power windows? My father didn't ponder long: "Something else to go wrong." Power seats? Ditto. Night-time adjustable rear-view mirror? "We can do that ourselves." White-wall tires? "Too flashy, but your mother did say she likes the turquoise and white." So we agreed that Chevy would build a totally stripped-down, two-tone wagon—just for us. But the conversation sold a car and started a relationship; we returned to the same salesperson when rust got the better of the Bel Air.

Adding value: engaging the buyer in the design and manufacture of a "custom" product.

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Fifty years later, I'm engaged with a Porsche salesman who is also trying to make sure that the most profitable car company on the planet collaborates with me to build a car that will perfectly fit my needs. But this time the conversation is not about power windows (standard), but about the controls for the windows. Did I want the standard black plastic, titanium, or some other metal of my choosing? Did I want to look at wheel options? (Any set of four cost as much as the Chevy wagon.) How about the Porsche shield in red and gold on the wheels? (In the salesperson's opinion the black shield didn't really "work.")

While the design of cars has made mixed progress over the years, manufacturers and dealers have long understood how to customize their product, engage prospects in the process, add value for the customer (and to the dealer and manufacturer), and do all this without taking the salesman out of the showroom, or the car off the assembly line.

The process of getting to a showroom and buying a car is not a one-size-fits-all journey. People approach their purchase in different ways. For some, these purchases are rational, based on cost, *Consumer Reports*, and what they need to transport themselves and their families from A to B. For others, cars are emotional purchases, grounded in romance, and in how they'd like to see themselves (or be reflected to others). For some, the sales cycle is short: I know what I want; you have it. For others, the process is longer; there are more conversations, interactions, need for information, and more shepherding of the prospect. For still others, there's the opportunity and need for conversation post-purchase —reassuring the buyer he or she did, in fact, make the right decision.

But across these different interactions, manufacturers and dealers understand that if they can start and steer a dialogue (long or short, as appropriate) that focuses on the customer's needs, framed in language that's meaningful to that prospect, they are more likely to achieve the immediate sale—and build relationships that could deliver value down the road.

Not rocket science. In person, if you're promoting a product or service, or trying to raise funds, you tune up your pitch based on what you know in advance, and then listen…. Based on what you hear, you respond, and anticipate, to best resonate with whomever is across the table. You manage a dialogue; you dynamically customize your message and its delivery. While we all do this, more or less, when having conversations, many who plan and implement print and digital communication programs don't. Communications from most organizations—brochures, direct-mail pieces, websites—are *pushed* out into the world with the hope that something will stick. Materials communicate "to" people, but not "with" them. And while day-to-day conversations have a "back" and "forth," communications from many for-profit and not-for-profit organizations often stop after the first sally forth.

So why aren't more print and digital communications focused on starting or continuing dialogues? Our guess: organizations just haven't thought about it; they're too focused on themselves; they think about communications as "things" to make and hand off; they think it will be too difficult and too expensive ("we don't have the horsepower, dollars, or infrastructure of Amazon or GE"); or they just don't know how to go about conceptualizing and implementing more resonant, engaging, two-way communication.

In our personal conversations, we adjust what we say based on what we hear. Why doesn't this give-and-take inform organizational communications?

Where to start: thinking in different dimensions

While there are strategies and tactics that can help organizations to better communicate "with" their constituents, and to initiate and advance dialogues, for these efforts to deliver maximum benefit, often some shifts in thinking are needed first:

+
It's not about "making things"—brochures, websites, other artifacts—it's about *influencing how people think, and then act* (ideally in your favor);

+
It's not about you, it's about "them." Most organizations are good at telling their story, but it takes a conscious shift to focus more externally and *include* the prospect or client *in* the story. How do they participate? How does the story change with their participation? What are the *benefits* to them?

+
It's about balancing "push" and "pull." Every time a customer or prospect is moved to call you or to give you information, they're one notch closer to you, and you're better prepared to steer the conversation;

+
It's about communicating what people need to know, when they need to know it, in order to progress the conversation. The conventional model—go to the supply closet and stuff everything in a FedEx box and ship it—often overwhelms the recipient and doesn't provide for the next interaction, and for the one after;

+ It's about understanding that prospects and customers are not a uniform lot; they have different needs, expectations, and have different relationships with you—relationships that need to be acknowledged;

+ It's about thinking of communications as a process, not an event or as items to be checked off a to-do list; dialogues are more organic;

+ It's about engaging your organization in the process; people who don't have "marketing," "sales," or "office of resource development" on their business cards often have opportunities to advance the dialogue—formally and informally.

Getting calibrated

Knowledge (and, often, homework) is important. Be clear about:

+ Who you're trying to engage;

+ What their needs and expectations are; what are the meaningful benefits you're offering;

+ Their relationship to your organization: the "distance" they are from you;

+ What they need to know and think in order to act in your favor—and move "closer" to you; what you need to know to move closer to them!

+ How your offerings and brand align with these key constituents; what are the likely "ways in;" what are the "resonant points?"

+ Where are the opportunities for engagement—for participating in the dialogue—for both you and your prospects and customers.

In a bit more detail…

The people and organizations you need to engage are probably a diverse lot. To take one example: those who participate in the process of applying, and matriculating, to a college often include: the candidate, his / her parents, a guidance counselor, friends, alumnae/i. Each of these groups has different information needs and different expectations.

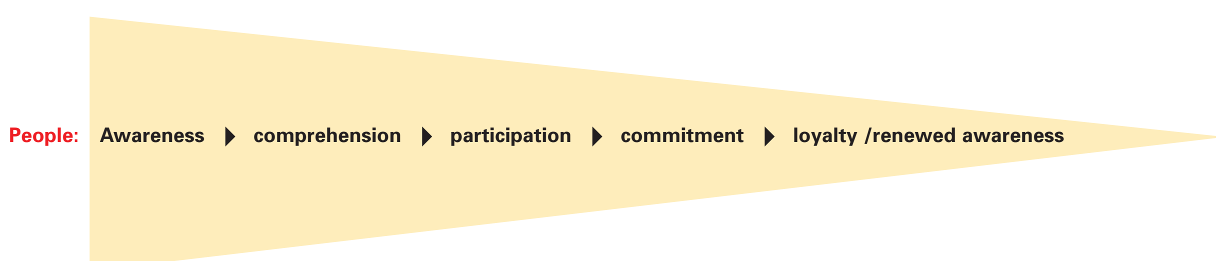
And within even a single constituency, people and organizations have different relationships with you. People can know you well and be loyal customers / donors; others may no little and have even less experience with your organization. While different terms are often used, both profit and not-for-profit enterprises need to move prospects and customers through a similar continuum *(see below)*.

It's hard to skip a step. A major donor is unlikely to be a person with little awareness and even less comprehension. A committed, loyal customer had to have developed awareness and comprehension previously, and than have participated. Depending on where a person or organization is on this continuum, they have different communication needs and present different communication opportunities. Communications can help to acknowledge these different relationships and move people closer to you.

People connect to your brand and offerings in ways that are meaningful to *them.* Sure, you've crafted a positioning statement, have brand attributes firmly in hand, and have done the requisite exercises to determine your organization's personality. But that's not equally meaningful to everyone with whom you're trying to communicate. People's expectations and needs align in different ways with your promises.

Volvo, for example, means different things—and offers different benefits—to different prospects: some connect to Volvo's historical strength in safety; some to the company's newer position as purveyor of high-performance, turbo-charged vehicles; some to the messages and products that talk to

Moving people closer to you



Whether you're a business selling products and services—or a not-for-profit trying to increase participation and philanthropic funds—prospects, customers and donors need to be moved through a continuum. The "closer" they are to you, the less your product will be evaluated solely on price; donors will stay engaged longer and invest more in your organization. Communications need to acknowledge different relationships and support progress across this "customer journey."

rugged, cross-country, all-weather vehicles. The company has different products and communications to connect to these various needs and expectations.

Few organizations take advantage of all opportunities to engage their constituents in a dialogue.

Similarly, people relate to symphony orchestras in different ways. For some people, it's all (and only) about the music; for some it's about the performance space; others care about educating the next generation of audience and performers—or about commissioning new work. Communications can open doors to these different ways in, leverage interest, and move a conversation forward.

Where? When are the opportunities to connect? Some opportunities occur naturally within a process, although most are not fully realized. For someone applying to college there are a series of touch points where communications can advance the dialogue—or not: there's the first on-the-road presentation to a group of candidates; search piece leave-behind; first web visit by candidate; request for a viewbook / application; response to this request; subsequent visit to website for more detail; arranging campus visit / interview; the visit; follow-up to visit; acceptance letter; follow-up; follow-up to response. There could also be meetings with alumni within the process. Each of these points is a chance to connect more closely (especially if the school wants a candidate), because the school is always learning about the candidate—or should be—and can shape the dialogue to be more specific and personal. The goal is to put that knowledge to work.

Often opportunities can be invented. It's easy to build a website that prompts the visitor to self-identify: "I've never been on the site before" vs "I'm a valued customer"—and then send the visitor to an appropriate "bridge" page that has content thought to be most relevant—or quick links to same. Credit card and utility companies have long understood that a bill to a customer is not just a bill—it's an opportunity to cram in all sorts of promotions and inducements. (These aren't likely to advance a dialogue unless the recipient's needs match up.)

Of course, understanding who you're talking to, their needs and expectations, their relationship to you, and what they need to know next in order to move in your direction does take some research, tracking, and an understanding (or re-structuring) of the opportunities to listen along the way. But expensive, quantitative research is not the only way to gain this understanding. We often find that people within organizations, especially those whose jobs keep them close to prospects and customers, often have a wealth of useful qualitative information. (What are the questions a telephone support person gets asked most often? What questions do they have a hard time answering? What are common misconceptions?) Small focus groups can also help to inform the process—as can conversations with people who did not buy a product or service, who decided not to donate to the annual fund this year, or declined your acceptance to join the class of '0X. What put these people off? What are the impediments? How are your offerings and brand perceived by these people? What are the benefits that they were looking for?

You, your staff, and ambassadors have to be both expert and comfortable with your messages. It's not enough to know your tagline.

Setting up a framework to advance dialogue

To keep the conversation moving, relevant, and welcomed, there are some communication infrastructure needs:

+ Messages and content readily available—content that can become more specific in direct proportion to what you're learning—and to changing relationships;
+ A brand system that has the ability to "tilt" by constituency or initiative;
+ An integrated architecture of vehicles for delivering this content—and for encouraging feedback and input—across media.

Building a content model that meets people where they are—and moves them closer: Harvard Medical School

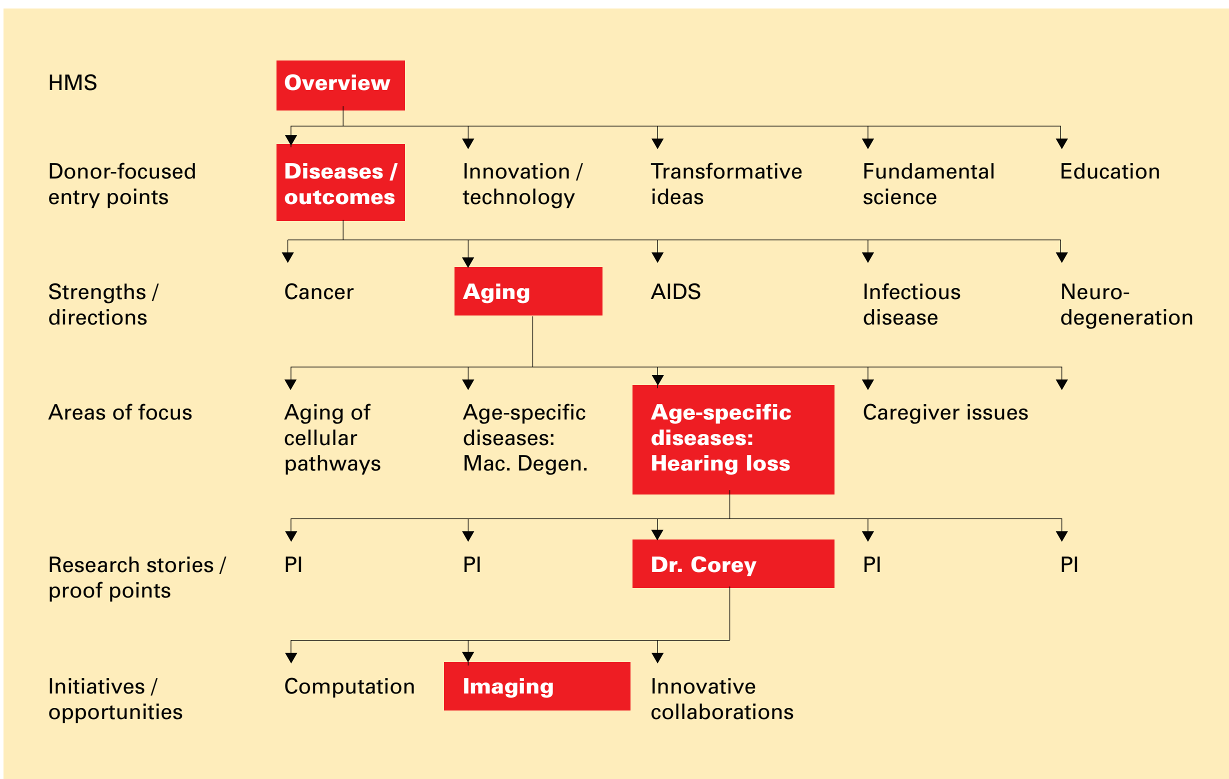
Working with a core team at Harvard Medical School, we identified different "ways in" for prospective donors. For some, "disease / outcomes" are important reasons to invest; for some "innovation / technology." Others resonate with being part of "transformative ideas," "fundamental science," or "education." For each, there are logical content tours.

"In the past," says project leader and Director of Development Communications Tamsen McMahon, "development officers were tasked with 'selling' an initiative. They took what communications were in the supply closet and hit the road. With this new system, after doing some homework, staff and ambassadors can offer different ways in, listen, and then marshal detail and stories that will resonate with a prospect. They have the knowledge and flexibility to begin and steer conversations that are all about the donor—and to continue the dialogue across time to build meaningful relationships."

The hypothetical "tour" below first introduces a prospect to Harvard Medical School and presents the five "ways in." If the prospect is interested in "diseases / outcomes" there are strengths and directions that add specificity to the discussion.

If the prospect is interested in "aging," the development officer can lead the conversation to identified areas of focus—"hearing loss," for instance.

The development officer can then follow up with specific research stories that prove Harvard's commitment and progress in this field—right on through to initiatives that need a donor's support: new high-powered "imaging" equipment.



A content system

To be able to nimbly anticipate, respond to, and steer the direction of a dialogue, you and your staff (and any corps of ambassadors) need to be both comfortable and expert with your messages and content. It's not enough to know the organization's tagline. Most often, dialogues move from the general to the specific, but this progression may lead down very different paths. Drafting the most likely "content tours" (and getting all within your organization familiar with them) goes a long way towards building comfort and expertise. And, ideally, you want to quickly recognize a prospect's or customer's relationship—their distance from you—and have a conversation that grows from that relationship. Content can then be delivered through the most appropriate channel: a chat, a print-on-demand data sheet, a relevant web page.

It's a very useful exercise to draft a message hierarchy—one that can then be promulgated across your organization:

+ Your main message;
+ How that might that tilt for different constituencies;
+ Your areas of focus;
+ Programs and initiatives that support these areas;
+ Stories that humanize and prove the value of these initiatives.

A brand system that can tilt

While brands can be defined around a conference table, they don't actually exist until your constituencies "get it"—until they pair the expression of your brand with the meaning you're trying to communicate. Brand expression encompasses your identifiers (logo, logotype), combined with how you use language, color, type, imagery, and design—across media.

Because your constituents are often not a monolithic group, the extent to which your brand identity system can "tilt" to better resonate with different target groups, the better chance you'll have to connect and begin or advance a dialogue. That is, without changing your promises or what you want to mean, you may need to ratchet up intensity of color or activity of typography for a younger group—and tone them down to connect to an older group. To anthropomorphize, you, personally, are your own "brand"—with your own positioning, attributes, capabilities, brand personality, and, maybe mission and vision. But you express your brand differently as needed: you're likely to greet and converse with your elderly aunt differently than you will with your old roommate, or with a "living legend" whom you meet at a conference. Building flexibility and consistency into your brand system will help you to start, and carry on, different dialogues successfully.

Craft a brand system with volume and tone controls so that it can be tuned to the interests and expectations of different constituencies.

An integrated, modular architecture

People's information needs change as their knowledge of, and relationship to, your organization changes. Anticipating how conversations might evolve, and having an architecture of materials at the ready to deliver appropriate content enables you to be responsive.

An architecture tries to anticipate the value and use of different media: when is print useful, when web, when media relations, when is a personal conversation necessary? (What's needed to build awareness; what's needed to encourage participation; what's needed to renew awareness of someone who has not been in touch for a while). For example, awareness is often best built through "broadcast" initiatives: advertising, public relations, direct mail, buzz marketing initiatives. Increasing comprehension can be done through appropriate web pages, print brochures, personal chats.

We know, for example, from work with several academic institutions that prospective students first look to the web, then print, then back to the web for more depth. They visit (ideally) and leave with additional print materials; they check the web again for more specifics; they are then influenced by the form of an acceptance letter / package.

Creating and deploying a modular architecture—both in terms of content and delivery—provides the flexibility to manage different dialogues, gives people the information they need when they need it, and saves money. For instance, instead of using your budget to produce a costly, thick, bound capabilities brochure and video (both with fixed, something-for-everyone content) to promote sales of ________, think in terms of:

+ A much scaled-down overview (that supports why the customer would want to do business with you, but that is not about products or services specifically), combined with…

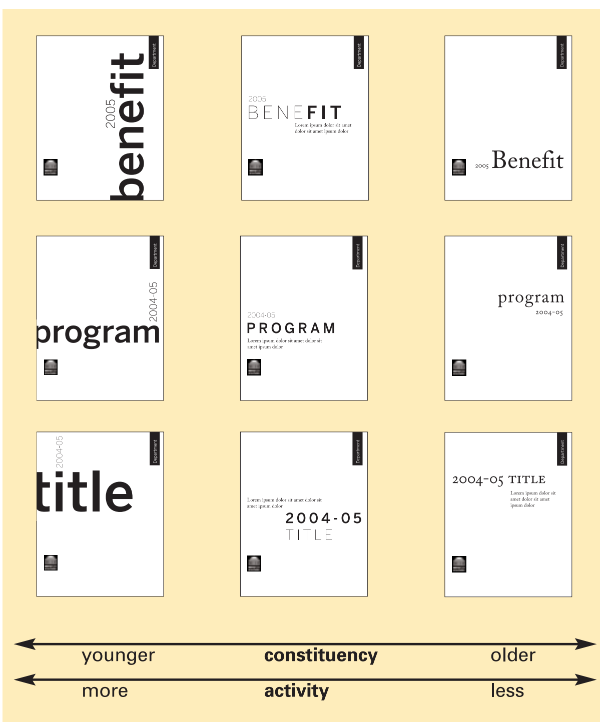
Configuring a brand system with volume and tone controls: MIT Sloan School of Management

Every school thinks they “need” a brand to succeed. And even if they’re not quite sure what a brand is, does, or how to get one, most organizations and their consultants believe that one size fits all—that a school’s brand is expressed and understood identically by a range of constituents.

Not true—or effective. The MIT Sloan School of Management needs to talk to undergraduates, candidates for MBA degrees, applicants to their Fellows program, and prospective PhD students—as well as to alumni, current and prospective donors, corporate partners, recruiters—and a rich mix of internal constituents. These groups have different needs, are coming from different life situations, and have different expectations.

Rather than develop a 1960s-Mobil Oil monolithic brand, Sametz Blackstone collaborated with a cross-program / cross-functional team to develop and express a brand for the school—positioning, messaging, print and digital materials—that could be “tilted” as appropriate for each group: different spokes comfortably aligned inside an over-arching umbrella.

“The beauty of the system,” according to Margaret Andrews, Executive Director of Marketing, MBA Admissions and Alumni Relations, “is that the system has volume and tone controls. We can make the typography more edgy and employ hotter colors for MBA materials; we can dial down the type, color, and imagery for Fellows materials; we can be quieter still for some development materials. The system gives us the tools to meet different constituencies on their terms, offer the right handshake, and continue a conversation in a voice that resonates. Not incidentally, the flexibility of the system also encourages buy-in, internally, across the organization. People were able to see that “their” constituencies were all of ours—and that communications could be both targeted and work hard to build the brand and image of MIT Sloan.”



Approaches to typography, color, imagery, language, and design moves were evolved to communicate the positioning and attributes of MIT Sloan to all constituents across programs—and to have volume and tone controls to tune communications to effectively resonate with specific audiences. *Shown above left:* typography can be modulated from more active to less so; recent viewbook for MBA candidates; the quieter annual report from the Dean.

+
Producing a series of short pieces that talk to your main offerings or initiatives… (with the idea of only delivering the piece that's most relevant…)
+
Combining this with a feedback mechanism (or follow-up call), so that you can then deliver…
+
More detailed, specific product or data pieces...
+
Point to the web for specs and user stories….
+
Send or serve up targeted media reprints and authored articles that support your brand premise as thought leaders in your space…
+
And proffer an invitation to a seminar on how _______ can improve your company's performance—at which you present your "custom" PowerPoint presentation (also crafted from "modules" and re-shuffled to speak directly to what your prospect cares about, based on all that you've learned).

Electrons and pixels: "narrowcasting" within a "broadcast" medium

The internet created a level playing field for enterprises of differing shapes and sizes, but it also leveled communications. Prospects, customers, investors / donors often get served up the same site; someone with a long-standing relationship lands on the same pages as does some "stranger" who Googled his way to you.

But people aren't looking to be homogenized; their interests and needs are specific, and if they have a relationship with you, they'd like it to be acknowledged. And you're looking to advance relationships and to move people closer to you—not to tell people what they already know, or assume they know something they don't.

"Personalization" was one response to the homogeneity of the web experience. But for many organizations, such solutions are too costly. And in addition to the high cost of entry, the equally high cost of sustaining such systems and murky return-on-investment data make it difficult for most organizations to justify building sites that can really be personalized. (Do you buy the book that "the system" suggests?) Today, these systems continue to be resource-intensive and lack enough standardization to offer managers confidence that investing and operating personalizing systems will allow them to remain focused on their core competencies—and really add value to the customer experience.

But the alternative to sophisticated, costly, personalization and to customer relationship management systems is not to just deliver broad-based messages and experiences—not to mount print brochures on your site. It is possible to open, advance, and steer dialogues without spending a lot of money and without building complex systems. When planning (or renovating) the navigation of your website:
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Think in terms of "tours." A customer might want to go to this page, that…. an investor or donor would have a different tour;
+
Consider a sub-navigation that lets visitors self-identify: "I am an… investor, reseller, donor"..., or identify their relationship: "I'm…a first-time visitor" or "I'm a long-standing customer." You can then set up "bridge" pages on your site that pull together what might be of most interest to these different visitors;
+
Write (and think) to different levels of depth. Someone who has awareness of your enterprise, but little comprehension, needs an overview. A visitor who's knowledgeable and loyal is looking for much more specific information—and to feel that his / her past decisions have been the right ones;
+
Employ typographic best practices. Set up information with clear hierarchies of heads and subheads so that pages can be quickly scanned—creating an implicit navigation within a page;
+
Give valued customers / donors / investors their own password-protected space. Increased access to information —and a sense of being in a more exclusive space—acknowledges close relationships;
+
Give people reasons to come back, reasons to continue the conversation. Providing information and insight that goes beyond what is needed for any specific transaction makes you into more of a resource;
+
Build in opportunities for feedback so that you can learn, respond, and anticipate;
+
Re-think "about us" and "what's new." It's about them and you don't want to promote that 98% of your site is "what's old."

Just because your website is available to everyone doesn't mean that each visitor should get served up an identical, homogenized experience.

Supporting the customer journey by communicating what people need to know, when they need to know it: Goodwin Procter LLP

"Not so long ago, marketing for professional services firms, and law firms in particular, was somewhat random, focused almost exclusively on tactical approaches, and driven by the objectives of individuals rather than by firm-wide strategies—or by an understanding of what people needed to know, when, in order to make decisions in a firm's favor," says Anne Malloy Tucker, chief marketing officer of Goodwin Procter LLP.

"As law firms have become more adept at marketing and business development, they have begun to shift focus from inward-facing, generic brochures to communications that better address clients' and prospects' needs and concerns.

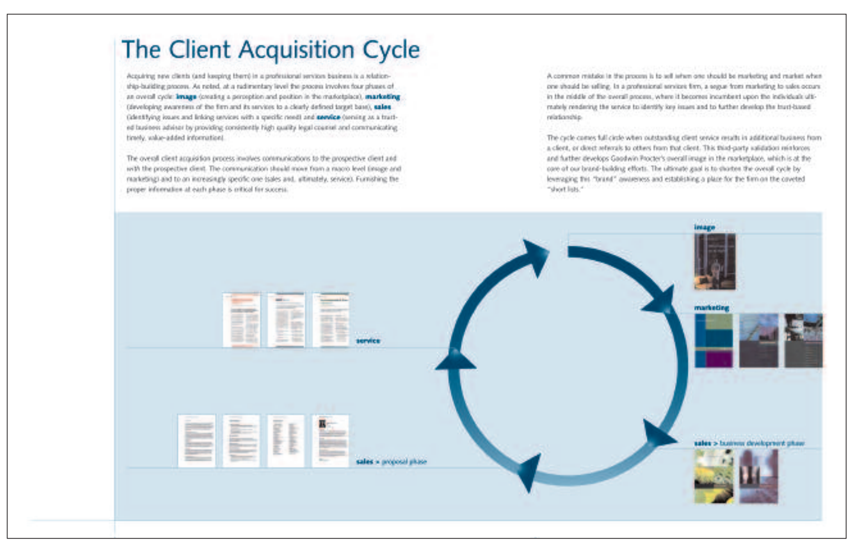
"In collaboration with Sametz Blackstone Associates, we've developed a system of brand-building communications that helps our attorneys to foster connections and build relationships while maintaining a unified image and visual identity for the firm. We now have an architecture that is consistent without being rigid or boring. We have the thinking and materials to support our sales cycle—and the meetings and conversations that build interest, comprehension, and trust."

Communications map to the needs and opportunities of customers and prospects; they help move the conversation along and map to the sales cycle.

unqualified — qualified — increased depth / cross-selling — loyalty

Above: **high-level image piece that addresses head-on what drives prospects to look for legal counsel (What keeps you up at night?); marketing piece for a focus area; more specific sales piece for a practice area; client advisory that maintains ongoing communications reinforces the value of the entire firm, and helps to cross-sell.**

Right: **to get everyone in the firm familiar with the new brand materials—and how to use what, when, to best advantage—we created tools to build internal awareness and comprehension.** ***Shown:*** **spread from print piece that explains the new architecture and how to use it.**



The ability to have dialogues—to have interactive, two-way communication—has long been a strength of the internet. From blogging, to instant messaging, to discussion threads, to simple e-mail, people who use electronic media now expect some sort of opportunity to exchange ideas with site owners. These options need to be considered within your wider architecture. To ensure that you're actually advancing a dialogue, and not just offering up bells and whistles that no one wants to ring or blow, be sure that:

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You have the resources—people and time—to facilitate the dialogue you're looking for. Many organizations make the mistake of believing that software can substitute for people. And while the software may offer the technical connections, it's not smart or personable enough to advance most conversations;

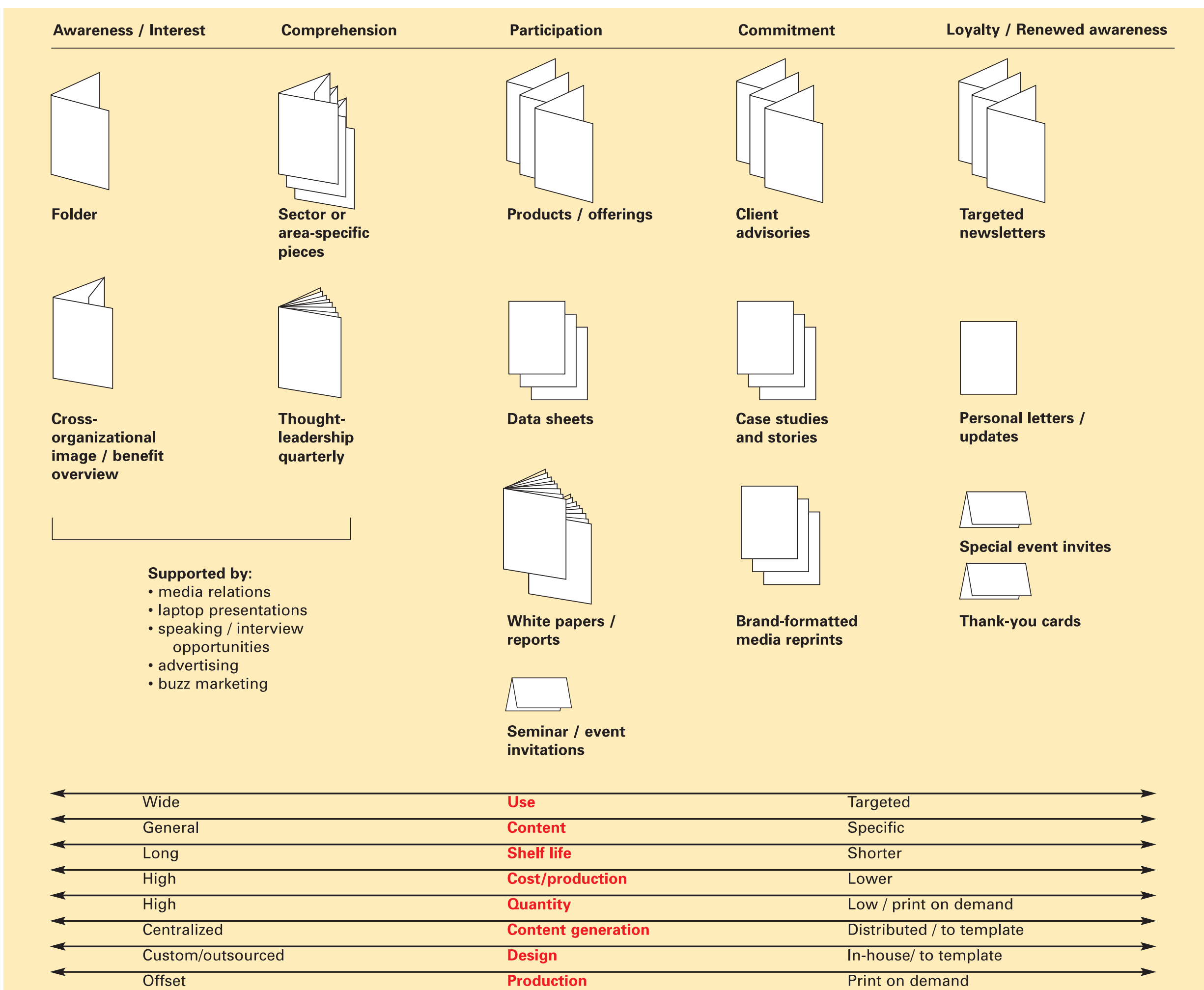
+
Responses are timely and within communicated expectations. If its e-mail: set a clear expectation that all e-mails will be responded to within __ hours, otherwise people will just think they're not being heard;

+
New software applications have useful / actionable data gathering, measurement, and reporting—systems that can help to monitor and measure online activities and support learning, development, and decision making;

+
"Shrink-wrapped" interactive applications (for discussion threads, instant messaging systems, blogging, etc.) will integrate with your current technical infrastructure (or you're willing to invest), have technical support available, and can be customized to your visual and verbal brand system;

+
New online initiatives will work for your customers and prospects. Will they fit within their current engagement / process / workflow? Will they be easy to use? Is there a value to people taking the time to use them?

Designing an integrated, modular, rational print architecture to support and progress different dialogues



Begin the dialogue…internally

Putting in place the infrastructure, content, and opportunities for starting and continuing dialogues only delivers results if those within your organization know how to listen and know what to say, and when. Training people—around strategy, tools, and content—is important for success. It's hard to be convincing in a conversation if you don't know what you're talking about.

Communicate, or, even better, develop collaboratively:

+ Shifts in thinking, needs, and strategies that are driving a more interactive, externally-focused approach to communication;

+ Different "ways in" to your organization and offerings, and the different constituent groups you're targeting;

+ Possible "customer journey" maps: what content and materials are most useful when;

+ Your communication architecture—print, digital, interpersonal—and how these different modalities can complement each other to advance understanding and relationships;

+ Tools that support understanding internally: wallet cards, role-playing, incentives.

Consider, also, engaging some of your best customers or donors in the process of developing and testing new vehicles and content. You'll gain valuable advice and get these people more engaged—and closer to you—in the process.

Engage and train your organization. It's hard to have a convincing conversation if you don't know what you're talking about.

An integrated architecture, continued

While a larger communication architecture helps you to plan for and use print, web, laptop presentations, e-mail, environmental, and interpersonal communication opportunities, a more specific architecture for print materials allows you to plan these pieces rationally, based on the parameters outlined at the bottom of this sample architecture.

A organizational overview brochure, envisioned as the lead piece in any number of scenarios, might be planned to have wide use, high production values, an outside writer, designer, and photographer. To justify this investment, and because it needs to help start a range of dialogues, it necessarily has to have general content. Good news: with general content the piece won't date; it can have a long shelf life and the investment can be amortized.

But this overview may only be useful at a few points in a dialogue—starting it, establishing credibility, providing a tool for the person you're talking with to start another with a colleague—to sell you internally, or back up a decision. Most often, more specific content will be needed to advance a conversation. Data and story sheets, for instance can be low-cost, printed on demand, templated, with a short shelf life. If these materials serve their purpose for one day, that's fine.

Short-run, easily-edited modules can be informed by what you've most recently learned and acknowledge the relationship the "other" has with you. Not only do they help to move the conversation forward, they help to avoid awkward non sequiturs. ("Why did they send me this when we were talking about___?")

Internally, a temporal flowchart can be laid over both the cross-media and print architectures: piece A is most useful to build awareness; pieces B1-2-3 add needed comprehension; piece D is handy for those who knew us ten years ago, but who are not up-to-speed around where we are now. With a modular, flexible architecture of print pieces in place (even if many live only on hard drives) you'll be able to create the value and efficiencies that the car companies learned to do: with the input of your customer or prospect, you will be able to generate and deliver customized communication packages, using processes and technologies you're already familiar with, to increase value to your customer or donor and to your organization's bottom line. Template-based, demand-print pieces can add as much specificity to the dialogue as your knowledge allows, but they can all be done on the same "assembly line." And if all these different vehicles are informed by shared approaches to typography, color, imagery, language, and design—they can read and look like they were conjured up specifically for your customer or prospect and work hard to build recognition of, and meaning in, your brand.

Results

Engaging constituents in your communications—and customizing content and delivery to be more in sync with people's needs and different relationships—will deliver results, but you may not be able to tally these tomorrow. Benefits need to be looked at in several dimensions:

immediate ⟷ long-term
tangible ⟷ intangible
external ⟷ internal
organizational ⟷ departmental

That is, while increased monthly sales or contributions to an annual fund can be measured immediately, building increased engagement among customers or donors will continue to improve the health of your organization over a longer term. And while your main goal may be to increase understanding, participation, and loyalty among external constituencies, building understanding and participation internally will also have significant and on-going pay-back.

Measurement systems need to match up with what is being measured. Often this is simple: good website traffic monitoring programs can tell you a lot about what part of your site is being visited, by whom, and for how long. If there are boxes and boxes of your capabilities brochure in the closet, that is useful information. Measuring whether engagement among key groups is deeper, or if the meaning of your brand has been internalized by a certain constituency, will require more qualitative measurement tools.

Peers talking to peers; creating opportunities for constituents to contribute to communications: Telem

TELEM means "moving together" in Hebrew. It's also an acronym in Hebrew for tenuah tz'i'rim mitnadvim, Movement for Youth Volunteers. Sponsored by the Jewish Community Relations Council of Boston and Combined Jewish Philanthropies, TELEM is an innovative program for Boston area Jewish teens that integrates community service, learning, and reflection—and provides opportunities for teenagers to help others, expand their understanding of the world, and effect real change.

And while there are "good" reasons to sign up and commit to a year of service learning, the marketing of TELEM had to move beyond "good." We had to position TELEM as fun as well as fulfilling, as a way for kids who may not be the coolest in their class to differentiate themselves, and to speak in a visual and verbal language that would resonate.

The marketing of TELEM is all about kids talking to kids—through print, html e-mail flyers, and the internet—beyond their school and towns to a wider community. In "Our scrapbook" teens post their photos and stories. Of course, a healthy competitive spirit helps: if your classmate has his / her story online and you don't, then there's ample incentive for you to add to the scrapbook.

According to Rebecca Sweder, Director of TELEM: Jewish Youth Making A Difference Together, "We knew, to succeed, we had to involve our teens in the marketing of TELEM; we knew we had to engage them in the conversation and not just push materials out into their already very noisy world. Our new brand and campaign is creating the buzz we needed; in the six months since we've launched the program, we've enrolled 25 percent more students than we initially projected."

Start the conversation

It's unlikely that you'd walk up to someone, say something, then turn and walk the other way, except with theatrical intent. Or say something, receive a response, and then say the exact same phrase again—as if you'd heard nothing. Or hand someone a page full of text and turn heel. Yet communications from organizations often do just that.

As communication strategists, writers, and designers, we, with our clients, are poised to do much more. By thinking more holistically and systemically about the goals and opportunities for communication—and by listening to and learning from constituents—we can, using the expertise and technology that we already have, "customize" communication paths and initiatives to launch and advance dialogues. We can design more value into the process of communication and into a range of print, digital, and interpersonal opportunities; we can raise the value of offerings and organizations to customers and prospects—and deliver increased value to the organizations with whom we work. ■

By listening to and learning from constituents, you can design more value into every interaction—and add value to your organization.

Reframing the conversation and including constituents in the dialogue at every point of contact: Illume

For this provider of travel services to faith-based organizations (primarily Catholic organizations), it was the nearly perfect storm. Before 9/11, planning and buying travel services had become increasingly commoditized; if you could book it on the internet, then thoughtful counsel was not needed; price drove decisions. After 9/11, the entire travel industry constricted radically, especially travel to the Middle East. Add to this the turmoil within the American Catholic Church.

We worked with this organization to re-launch the service under a new name—Illume—with a new set of brand promises. We helped them to broaden their focus and to appeal to a wider constituency: people who saw themselves as curious, open, caring, citizens of the world.

1

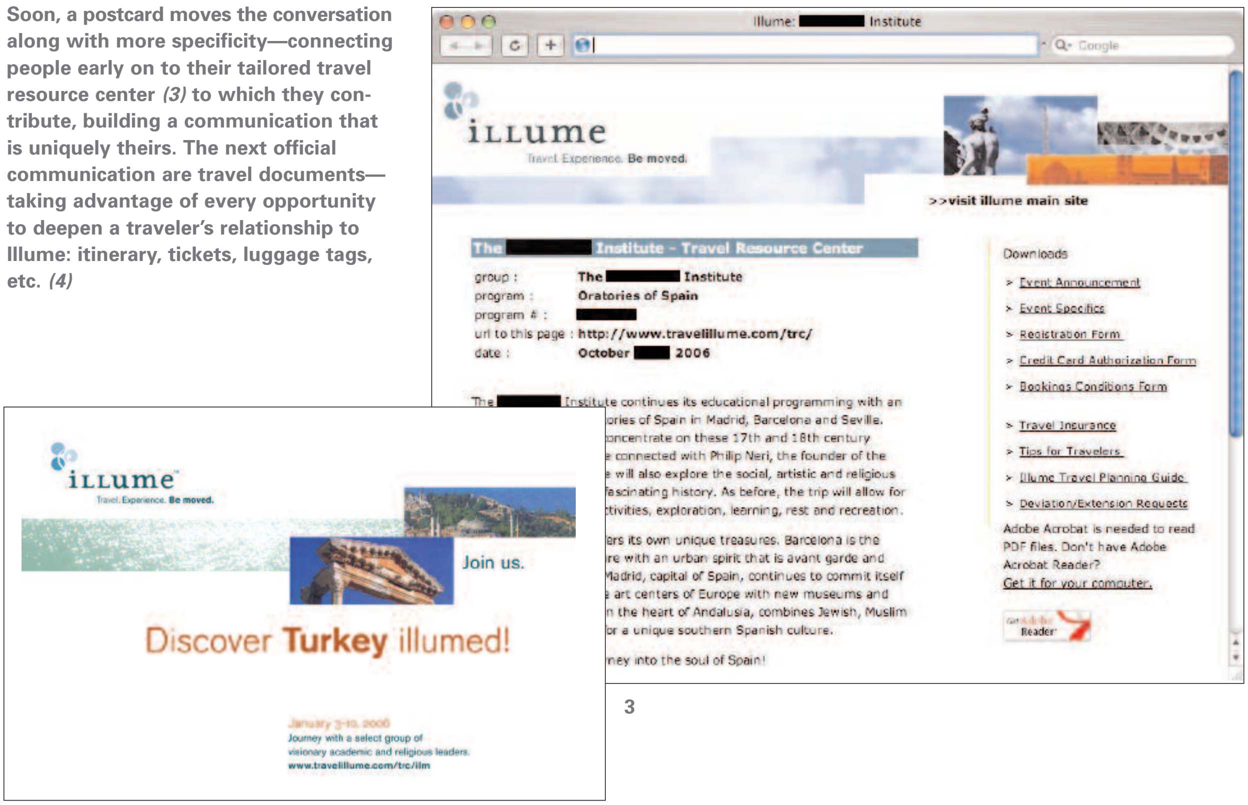
Sponsors and prospective travelers are introduced to Illume either through print or web welcomes *(1)*. Along with the first official communication that consummates the business relationship —usually an invoice—Illume includes a letter to excite the program sponsor and a bookmark to go with recommended readings about the journey / destination *(2)*.

2

Through print and web-based communications we helped Illume to better connect with their immediate customers—travel sponsors—and to give this group better tools to recruit, engage, and retain travelers. The home page provides different entry points that align with different goals of travel—to become citizens of the world, to deepen and renew faith, to study different cultures and languages—and then delivers information that is in sync with the visitor's goals.

MerriAgnes Ashley of Illume: "At every point of contact—even invoicing—we worked with Sametz Blackstone to develop communications that deepen the relationship with Illume by engaging customers in an ongoing dialogue. And all communications point people to their personal travel resource center. This online page develops in parallel with the planning and experience of the trip. Early on, suggested readings and links are posted; a 'welcome back' postcard encourages travelers to post their journal entries and photographs—to participate in building their travel resource center. Where we were once constrained by anxiety and fear, we are now benefiting by connecting to people who want to 'travel,' 'experience,' and 'be moved.' In parallel to the real journey, the customer moves closer to us."

Soon, a postcard moves the conversation along with more specificity—connecting people early on to their tailored travel resource center *(3)* to which they contribute, building a communication that is uniquely theirs. The next official communication are travel documents—taking advantage of every opportunity to deepen a traveler's relationship to Illume: itinerary, tickets, luggage tags, etc. *(4)*



3

4

5

A 'welcome home' card *(5)* greets returning travelers and prompts them to share their images and stories. Customer contributions build an ever more effective website.

About Sametz Blackstone Associates

Sametz Blackstone Associates, founded in 1979, is a Boston-based, brand-focused strategic communications practice that helps leading academic, cultural, corporate, professional service, and healthcare organizations to better navigate change.

The firm has years of experience helping both start-ups and centenarians to articulate their vision and value, and to build and nurture relationships with groups critical to an organization's success. Through strategic consulting and message development; the creation and production of integrated print, digital, environmental, communications; supporting and improving internal and interpersonal communications; and by transferring knowledge and tools to clients so that they can fully own their communications systems and engage their organizations, Sametz Blackstone helps clients to realize both their strategic and tactical goals. The firm collaborates to help organizations build or re-energize brands, promote products and services, recruit and retain the best and the brightest, raise philanthropic dollars, build membership and participation, strengthen their competitive position —and add value to the enterprise over the short and long term.

Located in Boston's historic South End in a 150-year-old brownstone, Sametz Blackstone works with clients around the corner and around the world.

Sametz Blackstone Associates

Compelling communications—integrating brand-focused strategy, design, and technology to help evolving organizations navigate change

40 West Newton Street
Blackstone Square
Boston, Massachusetts
02118 USA

+1.617.266.8577 phone
+1.617.266.1937 fax

blackstone@sametz.com
www.sametz.com