

# PRACTICE PRIOR PURPOSE

Expanding a brand's  
capacity to grow with  
social purpose.

By

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Our Partners



SUSTAINABLE  
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The Practice of Purpose project is the result of a research partnership between Sustainable Brands and the Ray C. Anderson Center for Sustainable Business. This report represents the output from the first phase of a multi-phased study seeking to identify the strategies and practices that fuel the ability of marketing managers to “Compete on Social Purpose.” This is not a study about companies and their CSR programs. Rather, this is a study of brand leaders, their teams, and the practices followed or invented by pioneers of purpose—those leaders in large or small firms who manage the complexity and challenges of growth through social purpose.

## Executive Summary

Despite the growing attention that brands with purpose have received, industry adoption of social benefits is lagging behind other critical transformations such as digital or analytics. The integration of social benefits (either environmental or community related) in the marketing of brands remains on the periphery of many leaders' priorities.

What's more, among many brand and business managers, the pursuit of a social purpose is, at times, perceived as a distraction or an unwanted constraint to their ability to achieve their business goals. As a result, the potential of social benefits is often limited by the perception of uncertain outcomes, unclear methods, and unwanted risks.

This project was created to help close the gap between the potential of social purpose and the actions of marketing leaders. Our goal is not just to inspire, but also to enable the integration of social benefits into brands. However, more brands with purpose will only happen if there is more growth through purpose. Therefore, the focus of this work is on identifying and describing practices associated with successful purpose-based brands and programs.

The Practice of Purpose project is a multi-phased research initiative in partnership with Sustainable Brands and the Ray C. Anderson Center for Sustainable Business. The work was led by Omar Rodriguez Vila, Ricardo Caceres, Sundar Bharadwaj and CB Bhattacharya. This first report is based on in-depth interviews with leaders of purpose-based brands and programs across a wide range of industries. It identified over 50 practices, skills and capabilities present when integrating social purpose into marketing activities and organized across three dimensions:

### **Management Practices**

Activities managers should consider when preparing their work for purpose. These practices cut across the four phases performed by most marketing management organizations - Understanding the Market, Designing the Offering, Going to Market and Measuring and Learning

**Support System**

Activities managers should consider to create the necessary conditions for success. It includes actions for preparing both the brand and the organization to compete on purpose.

**Leadership Behaviors**

Considerations and behaviors identified as important by leaders of purpose-based brands.

**Key Findings from the First Practice of Purpose Report:****Design the Right Model, Not Just the Right Message**

The social purpose of a brand can become a critical aspect of its value proposition, but it is not all the brand will do. Therefore, knowing when and how to compete on purpose is as important as finding the right stories to share with consumers about the brand. In particular, a detailed analysis of 70 purpose-based cases provided insights into four different models used to integrate purpose into a brand: The Engagement-Based Model, the Practice-Based Model, the Product-Based Model, and the Externality-Based Model. The report provides a description of the different models, an overview of important capabilities, and a framework to help decide which model might be more appropriate for a brand.

**Translate to Integrate**

Many managers know that in order for social purpose to work, it must be integrated with the brand's business needs. Yet, the integration can be hard given the newness and complexity of societal needs. In our study, we find that active translation and education are critical for integration. This means describing the social issues and opportunities in language and concepts the organization already understands and values, as well as actively educating key stakeholders along the way.

**Provoke Mindfulness, not just Centricity**

Customer centricity is an increasingly critical aspect of marketing management. Over time, we have been trained to understand people as consumers. However, when competing on purpose, managers seek to also understand consumers as people by noticing, studying, and considering broader needs as well as stakeholders.

**Need to Evolve the Research Methods**

Research into consumer preferences has traditionally relied on claimed attitudes. However, social benefits can induce bias that lead to over or under representation of its potential. Also, declared methods to measure preference can undermine the value of emotional effects of a social claim. Therefore, when studying purpose related claims, managers should use derived methods of consumer research such as conjoint, choice models, and field experiments, where consumer preferences are revealed rather than reported.

The next phase of the Practice of Purpose project will seek to measure the practices and establish benchmarks that can help managers define the specific capability changes in their organizations.



Darren Beck  
Senior Director, Corporate  
Membership  
[Sustainable Brands](#)



SUSTAINABLE  
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## The values and desires of consumers are shifting.

Rather than pursuit of money, status or personal achievement, consumers are beginning to seek balance and simplicity, along with greater connection to family, community and the environment, as foundations of a well-lived life. This suggests they are ready for brands to tap into this shifting sentiment by delivering a message that goes above and beyond consumerism – a message that is driven by purpose.

At Sustainable Brands, our mission is to enable the success of those brands that are shifting the world toward a sustainable and flourishing economy. We have built a community of over one million business change-makers who work to embed purpose-driven environmental and social innovation into the DNA of their business. We are therefore delighted to partner with The Ray C. Anderson Center for Sustainable Business on this project to advance our collective understanding and mastery of purpose-driven marketing.

Our Corporate Member Network is the leading peer-to-peer, learning and networking group designed to help brands meet their sustainability goals and lead the way to a better future. Sustainable Brands' Corporate Members have an unmatched passion for and a wealth of experience in leading purpose-driven work. As initial contributors to this project and as steering committee members, their insights have shaped key findings and helped to define the business logic behind embracing social purpose.

Contributing members include: Danone, REI, The Hershey Company, Nestle, Timberland, Unilever, Procter & Gamble, Kimberly-Clark, Heineken, Johnson & Johnson, and LG Electronics.

Purpose driven marketing represents both an opportunity and a challenge. Our members are pioneers in this field, but even they have faced their fair share of obstacles, missteps, and disappointments. We are grateful to the Ray C Anderson Center for sharing our vision of accelerating progress through knowledge sharing. We look forward to continuing this collaboration and launching additional partnerships that inspire, equip, and engage our community to lead the shift to a sustainable future.





Michael Oxman  
 Managing Director  
 Ray C. Anderson Center for  
 Sustainable Business  
 Scheller College of Business  
 Georgia Institute of  
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 for Sustainable Business  
Scheller College of Business

Ray C. Anderson is our namesake, our inspiration, and the embodiment of our vision to empower the leaders of tomorrow to create sustainable businesses and communities.

While no introduction is likely necessary, Ray was a successful entrepreneur who built his company, Interface, into a major force in the carpet industry. What made Ray C. Anderson so special, however, was not his business prowess (which he certainly had in spades), but rather the way he harnessed a unique combination of self-reflective humility, courage, and resilience to first imagine, then affirm, and ultimately to guide Interface with a social purpose that connected with his understated, but powerful mantra of “doing well by doing good.”

At the Ray C. Anderson Center for Sustainable Business (ACSB) within Georgia Tech’s Scheller College of Business, we seek to inspire and educate the Ray Anderson’s of tomorrow by integrating environmental and social purpose into business education and practice. We do this in three ways. First, our Center’s 16 affiliated- faculty (across all major business disciplines) conduct sustainability research and publish in leading academic journals that we then synthesize for practitioner consumption. Second, we develop coursework for our undergraduate, MBA, and PhD students that is infused with sustainability theory, cases, and practical experience. Third, we engage with business and community partners to catalyze sustainability-driven innovation and to support a vibrant ecosystem among business, faculty, and students.

Given our own commitment to advancing sustainability, we are most grateful for the opportunity to partner with Sustainable Brands and its contributing members on this work to understand and assess the attributes of purpose-driven corporate marketing activities. By examining both the challenges and success factors experienced by actual projects in this arena, we can derive lessons learned and best practices for further research and application that will help ensure a purpose-driven future for 21st century businesses. We look forward to continuing our engagement on this impactful topic!

# WHY?

## More brands with purpose

This project was created to help close the gap between the potential of social purpose and the actions of marketing leaders. Our goal is not just to inspire, but to enable the integration of social benefits into brands. However, “more brands with purpose” will only happen if there is “more growth through purpose.” Therefore, the focus of this work is on identifying and describing practices associated with successful purpose-based brands and programs.

## Significant progress, trapped potential

The integration of sustainability and social benefits in the marketing activities of brands has been on the rise over the past two decades. At the same time, numerous studies have suggested that consumers are increasingly taking into account the social impact and values of a brand in their purchase decision (2015 Nielsen Global Corporate Sustainability Report; 2015 Cone Communications/ Ebiquity Global CSR Study). On the surface, everything points to great potential.

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“OUR MODEL IS BASED ON SUSTAINABLE GROWTH. WE’RE DOING THIS BECAUSE WE WANT TO GROW OUR BUSINESS AND ALSO IMPROVE OUR SOCIAL IMPACT ON SOCIETY. IT DOESN’T WORK IF WERE A PURPOSE MINDED BRAND AND WE’RE NOT GROWING.”



Yet, recent studies into the priorities of Chief Marketing Officers or Marketing managers tell a different story. For instance, sustainability and social purpose are boldly absent among top CMO priorities identified by Forrester, the IBM Institute, and the CMO survey by Duke University. Despite the growing attention that brands with purpose have received, industry adoption of social benefits is lagging behind other critical transformations such as digital or analytics.

The integration of social benefits in the marketing of brands remains on the periphery of many leaders' priorities and agendas. What's more, among many brand and business managers, the pursuit of a social purpose is sometimes perceived as a distraction or an unwanted constraint to their ability to achieve their business goals. As a result, the potential of social benefits is often limited by the perception of uncertain outcomes, unclear methods, and unwanted risks.

---

“ THE TIME WHEN EVERYBODY LEANS FORWARD IS WHEN WE START TALKING ABOUT THE SOCIAL PURPOSE WORK. EVERYBODY GETS REALLY PASSIONATE ABOUT THIS, AND THEN WHAT WE CHOOSE TO PRIORITIZE WHEN WE TALK TO OUR CONSUMERS ARE MESSAGES ABOUT THE PRODUCT. WHY DON'T WE BELIEVE WHAT MAKES US REALLY EXCITED AND FEEL REWARDED AND FUELED TO COME TO WORK EVERY DAY IS NOT WHAT MAKE CONSUMERS WANT TO BUY OUR PRODUCTS. ”



MARKETING DIRECTOR

## Section 2

# OVERVIEW

## Overview of research

Does managing a brand with a social purpose involve different strategies and practices than managing more traditional brands focused on product performance? If so, what are they? The answer to these questions is critical to the ability of more managers to achieve growth through purpose.

To study this important question, we need a new research approach. We could not focus on company level strategies for sustainability. We needed to study the question at a brand level and if possible, a project level. Also, we needed an open and honest account of the internal challenges facing purpose-based efforts, as well as of the methods and practices that enable progress. Therefore, the team conducted a thorough review of academic and practitioner literature on related topics including CSR, social purpose, social entrepreneurship, sustainability, and cause marketing. With the support of Sustainable Brands, it then conducted in-depth interviews with 39 pioneers of purpose - both sustainability or marketing professionals leading the charge for purpose-based growth in their firms. The interviews produced over 1,500 data points that were categorized as part of the identification process for the practices. Finally, a database of 70 different purpose-based programs was created and studied as part of the analysis.

We worked with a Steering Committee of purpose leaders that provided input along the way. The analysis resulted in the identification of 10 capabilities, 3 success conditions, and 50 practices, all described in the pages that follow.

# The project team

## Research Team



### Academia

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### Industry

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Former Global Director of  
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Purpose Project

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Timberland  
Whitney Mayer & Jeff King:  
Hershey's  
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Nelson Switzer: Nestle

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Kimberly Clark

**Antti Isokangas**  
Kotipizza

**Christine Ackerson**  
LG

**Mike Pepperman**  
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**Scott Hamlin**  
Looptworks

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**Paul Bakus**  
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**Pia Baker**  
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**Virginie Helias**  
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**Alex Thompson**  
REI

**Samantha Taylor**  
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Tecate

**Maria Alejandra Anez**  
The Clorox Company

**Luis Gerardin**  
The Coca-Cola Company

**Whitney Mayer**  
The Hershey Company

**Maya Brahman**  
The World Bank

**Margaret Morey-Reuner**  
Timberland

**Jonathan Atwood**  
Unilever

**Kathleen Dunlop**  
Unilever

**Marissa Orozco**  
Yulu



# GOOMPETE

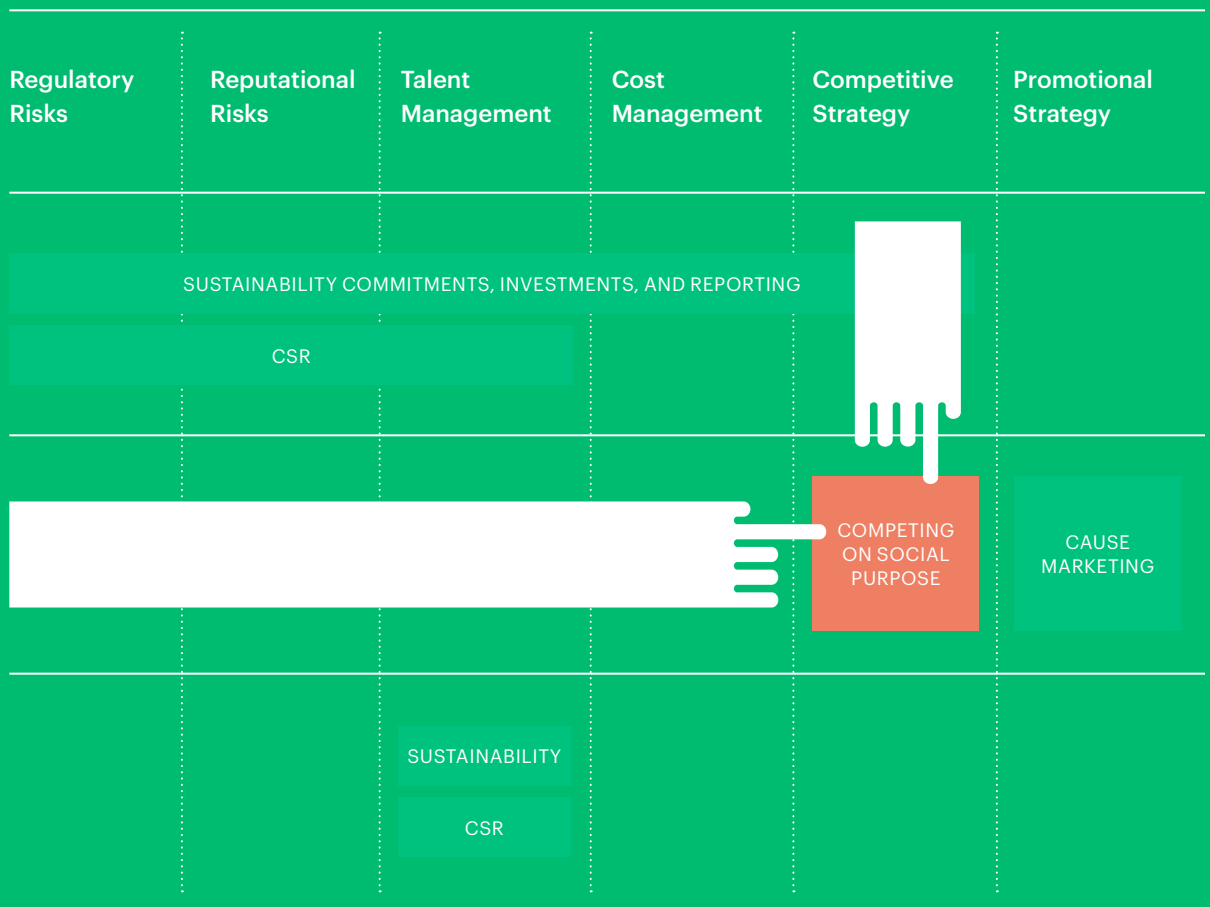
## What is to “compete on social purpose?”

Companies take many actions that benefit society, but that does not necessarily mean they are competing on social purpose. For instance, many brands donate money and products to causes, particularly in times of disaster. Yet their growth strategies are not based on the creation of social benefits.

There are three important distinctions between Competing on Social Purpose (CSP) and other related activities that companies engage in to embed sustainability and social benefits. First, Competing on Social Purpose is a brand level activity, not a corporate level activity. Over the last decade, companies have made significant progress in defining and advancing their sustainability and CSR programs, as well as establishing broader purpose statements. These actions cut across a wide range of goals and areas of the firm. However, they tend to be company level initiatives, not brand specific initiatives. Second, they are often the result of materiality assessments of risks, rather than customer assessments of needs. Therefore, despite their critical nature in firms’ long-term strategy, we consider sustainability and CSR initiatives a different category of investments from Competing on Social Purpose. We focus primarily on brand level investments that seek to create social benefits for a brand with the intent of achieving its business objectives. Finally, purpose has also been discussed at the level of individual employees in the organization. While this is important, it is a different level of analysis from our study. The primary focus of Competing on Social Purpose is on turning social benefits into value for customers.

# Competing on social purpose differs from other related activities

Motivations for Societal Investments



As a result, we define competing on social purpose not as an objective or a goal in itself. CSP is turning societal benefits into customer value.

A marketing strategy to achieve brand growth objectives by building societal benefits that create value for customers.

Linked to a specific business need.

A choice. Maybe not for every brand.

Current or potential customers.

Connected to the reasons people buy your products.

Societal actions as a new form of brand attributes.

Competing on social purpose has two lines of work:

**COMPETE**  
**ON PURPOSE**



**STRATEGY**  
**OF PURPOSE**

**PRACTICE**  
**OF PURPOSE**

—Integrating social purpose into your brand is not a goal in itself. It is a strategy. It is not a requirement, but instead an opportunity for some, but not all, brands.

—The focus of this report is to identify and describe specific practices that are needed when managing a purpose-based brand.

—The findings and recommendations are reported in the article published in the Harvard Business Review in September 2017.

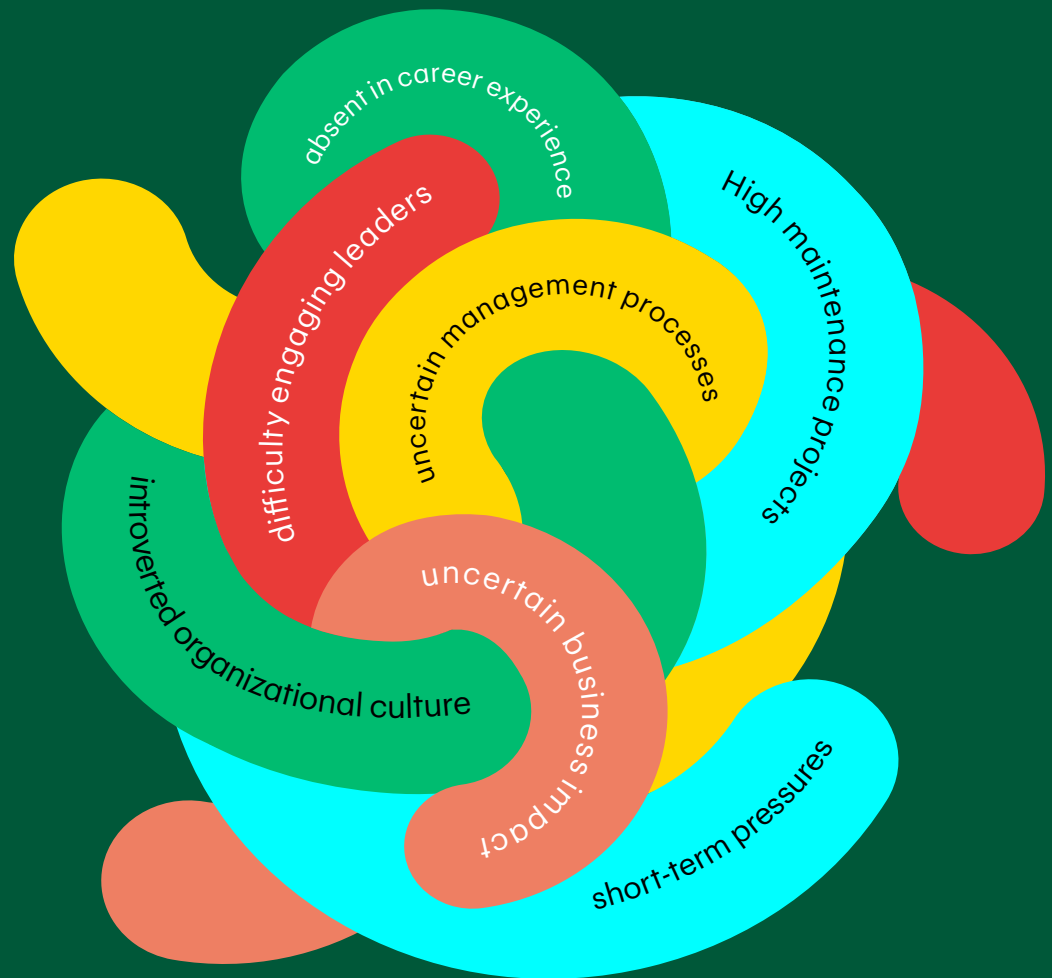
# THE FALLS CHANGES

## Section 4

## The state of purpose-based marketing

The potential for brands to achieve both business and social outcomes has been demonstrated by the success of many brands in the past decade. However, managers still face important barriers and challenges when seeking to compete on social purpose.

Despite the broad coverage and enthusiasm expressed by many companies on purpose related activities, our interviews point to a growing divide and frustration among marketing and sustainability leaders in their efforts to compete on purpose.



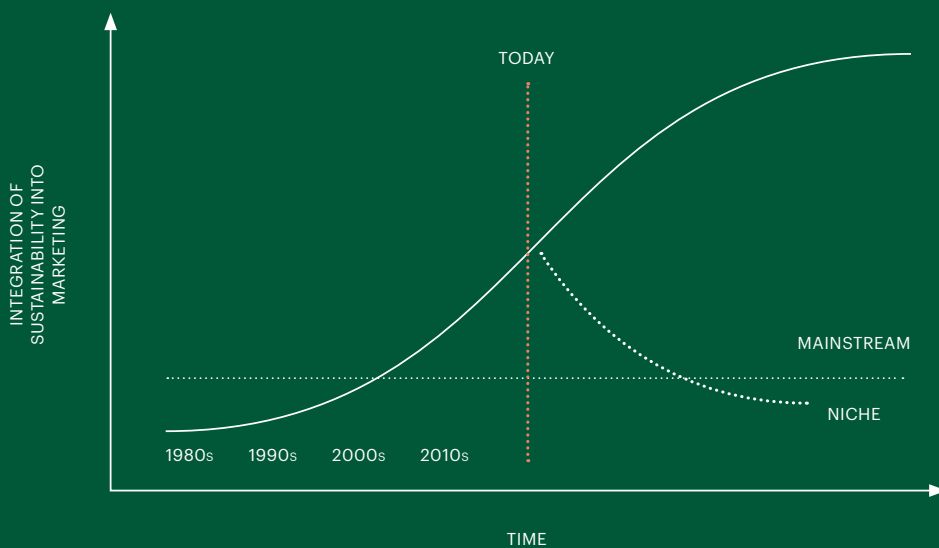
# 1. Difficulty in engaging business leaders

Many marketing managers responsible for the business performance of their brands expressed hesitation and skepticism about the potential of social benefits to help their brands achieve their critical goals.

We sensed distrust of industry studies that point to high levels of interest among consumers and strongly held beliefs that those claims do not translate to actual purchase behavior.

Sustainability leaders sometimes expressed a sense of frustration about the lack of engagement of the marketing teams with the work needed to compete on social purpose. They believe marketers are undermining and under leveraging valuable assets in the form of sustainability and CSR related actions by the firm which could become drivers of growth.

The tension between these two critical functions necessary for CSP, if unresolved, can lead to a decline in the pursuit of social benefits.



1. There seems to be an inflection point in the evolution of Sustainability and Marketing.
2. The attention and investment could continue to expand, or could decline back into a niche practice.
3. Some key companies are expanding (P&G), while others are taking steps back (Coke).
4. Most reported the strong presence of skepticism about the business value of CSP (outside intangibles).
5. Perception of CSP as “Storytelling” a company’s CSR work through the brands. This limits its strategic role.
6. There is a need for a more formal definition of socially-driven growth as a business discipline.



## 2. Short-term pressures and tenures

Purpose related growth usually has longer development stages and germination periods in the market.

When business leaders are measured, promoted, and incentivized primarily on short-term business outcomes, it does not create an environment conducive to the experimentation and exploration required for purpose-driven marketing.

The duration of a brand leadership role is sometimes short (2-3 years), creating an additional disincentive for investing in an effort that may take the full tenure to develop. Marketing managers have limited time to demonstrate their ability to perform, favoring programs with proven impact on the business.

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*“WE HAVE A ROTATIONAL LEADERSHIP MODEL WITH OUR PARENT COMPANY. AND SO, A LOT OF TIME WE EDUCATE LEADERSHIP AND THEN THREE YEARS HAVE TO EDUCATE LEADERSHIP AGAIN.”*



SUSTAINABILITY DIRECTOR

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*“AND PEOPLE STILL LOOK AT SUSTAINABILITY AS EXTRA AND AS A “NICE TO HAVE”. WHEREAS YOU’VE GOTTA KEEP THE LIGHTS ON. YOU CAN’T BE THINKING ABOUT SUSTAINABILITY.”*



SUSTAINABILITY DIRECTOR

### 3. Introverted organizational culture

Some companies are highly protective of their corporate activities practices and reluctant to be open or vocal about their contributions to the community or society at large.

Often times they prefer to go unnoticed, not wanting to call attention to their progress on sustainability programs or

commitments, believing the attention could bring unwanted criticism or risks.

This general orientation towards communication of corporate activities can become an inhibitor of brand level purpose initiatives.

SUSTAINABILITY DIRECTOR




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“WE ARE A VERY RISK AVERSE ORGANIZATION, AND IT WOULD BE A BIG CHALLENGE TO GET ANY OF OUR BUSINESS UNITS TO STEP UP TO THE PLATE WITHOUT HAVING VERY SPECIFIC OF PROOF POINTS AS GUARANTEE OF THE BUSINESS POTENTIAL.”

SUSTAINABILITY DIRECTOR




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“FOR ME IT’S ABOUT FEAR OF THE UNKNOWN ABOUT WHERE [EMBEDDING PURPOSE] MIGHT TAKE YOUR BRAND. FOR INSTANCE, IF YOU LAUNCH SOMETHING THAT IS ORGANIC, WHAT DOES IT SAY ABOUT THE REST OF YOUR PRODUCTS AND HOW IS THAT GOING TO BE PERCEIVED BY CONSUMERS?”

## 4. Uncertain business impact

Marketers often don't have internal data that helps demonstrate the business case on social benefits.

External market case examples and studies can help generate interest, but are rarely enough to motivate investment.

It can also be difficult to determine the opportunity costs of a purpose-based strategy by comparing its potential with more traditional investments.

Finally, some companies have experienced less success than expected with initial efforts of integrating social purpose into their brand, affecting the credibility of this new strategy.

As a result, many marketers perceive social benefits as a potential distraction to their efforts of competing in the marketplace.

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*“THE MARKETERS DON'T HAVE THE INFORMATION THEY NEED TO SAY THAT THOSE MESSAGES WILL WORK BETTER THAN WHAT THEY TRADITIONALLY USE. SO THEY'RE NOT WILLING TO TRY THOSE MESSAGES OUT FEAR OF SEEING A DECLINE IN SALES.”*



SUSTAINABILITY DIRECTOR

## 5. High maintenance projects

Purpose-based strategies require continuity, which may impose more active maintenance efforts than traditional marketing programs.

It can also be demanding, particularly in the beginning stages, given the complexity involved in crafting a viable and credible social contribution.

## 6. Absent from career experience and mental models

Most marketing leaders working in established firms today did not work with sustainability or social benefits issues as part of their career training. The topic

is only recently being embedded into business school education and was unlikely to have been a requirement in their earlier career experiences.

SUSTAINABILITY DIRECTOR



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*“YOU’RE CHALLENGING THE ASSUMPTIONS THAT THEY HAVE BEEN BROUGHT UP ON. YOU’RE CHALLENGING THE NORMS IN WHICH THEY WORK, WHAT THEY POSSIBLY LEARNED IN SCHOOL. THEY DON’T SEE AS AN INHERENT BENEFIT.”*

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*“YOU JUST HAVE TO GET PEOPLE OUT OF THINKING ABOUT WHAT THEY KNOW TO BE TRUE BASED ON PAST HISTORY BECAUSE IT’S NEW AND WE HAVEN’T DONE IT BEFORE, SO THERE ISN’T THAT PAST HISTORY AND THAT LONG EXPERIENCE.”*



SUSTAINABILITY DIRECTOR

## 7. Unclear know-how

It is not clear how to manage some of the key aspects of a purpose-based strategy. For instance, how to select a social purpose? How to develop the right message for it? How to test for its effectiveness? How to manage the potential message diversity it introduces?

It can also become difficult to unify and coordinate the brand tone and message

across different agency partners and between the brand and corporate efforts.

In addition, there is an absence of clear metrics when evaluating the success and business contributions of a social purpose strategy, particularly when it occurs parallel to other brand activities.

SUSTAINABILITY DIRECTOR




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*“A LOT OF PEOPLE IN OUR BUSINESS DON’T EVEN KNOW WHAT CSR IS. DON’T EVEN KNOW WHAT SUSTAINABILITY IS. AND THEN ON TOP OF THAT, THEY DON’T KNOW HOW THE COMPANY THINKS ABOUT IT AND HOW THE COMPANY PRIORITIZES IT. SO A LOT OF AWARENESS RAISING.”*

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*“THE MAJORITY OF THE MARKETING THAT HAPPENS AT MY COMPANY IS AROUND PRODUCTS, YOU KNOW, WHICH DOESN’T CORRESPOND OFTEN WITH THE WORK THAT WE DO OF SOCIAL IMPACT AND SUSTAINABILITY. THERE’S A DISCONNECT.”*



SUSTAINABILITY DIRECTOR

# THE PRACTICE

## Fundamentals of CSP

Numerous studies and reports have provided insights on the factors that aid in the success of purpose-based programs. These are findings that we consider foundational, but are not covered in this report because our intent is to build on what is currently known. The factors include:

1. Senior leadership support
2. Deeds before words
3. Need pilots and small wins to create momentum
4. Transparency of progress and authenticity
5. Authentic storytelling

### **1. Senior leadership support**

The endorsement, advocacy, and permission by senior leaders, particularly those who control resources, is essential in enabling the type of experimentation required to design and implement a purpose-based strategy.

### **2. Deeds before words**

Most purpose-based leaders continue to prioritize the importance of cementing a solid foundation of actions and contributions before making public their social benefits and purpose.

Also, the determination and announcement of specific targets are important in establishing commitment and momentum.

### **3. Need pilots and small wins to create momentum**

Creating momentum inside an organization for more purpose-based brands starts small, through the experience of one or two brands, sometimes in a single country. If successful, those experiences generate credibility for the strategy and strengthen the confidence of other managers to invest in the creation of social benefits.

### **4. Transparency of progress and authenticity**

Measuring progress relative to goals and making the information public is important in generating credibility and trust.

### **5. Authentic Storytelling**

Understanding how to engage consumers with the social benefits of a brand is an essential element of their success. Just as important is the role of storytelling as a way of engaging internal stakeholders and partners along the way. Purpose-based work lends itself to the use of stories as a way of engaging the market. It is also known that these stories must be authentic and credible. Part of what makes them authentic is the evidence that supports them and the fit with the brand heritage and perception.

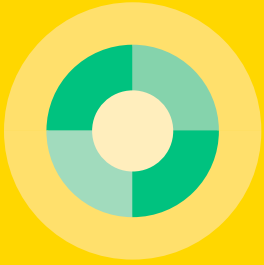


## The practice of purpose framework

In addition to the foundations already understood and important, we identified a series of practices that are particularly important when managing a purpose-based brand. We organized the practices across the work of marketers, their support systems and the leadership behaviors necessary to compete on purpose.



## The practice of purpose framework—how it works



### Preparing your work Management Practices

These are activities managers should consider in preparing their work for purpose. They cut across the four phases of work performed by most marketing management organizations.

#### **Understanding the Market**

Market research into the uncovering of customer needs, brand performance or competitive activities.

#### **Designing the Offering**

Identifying the target segments, crafting the value proposition, and defining the marketing strategies that will guide the development of products and programs.

#### **Going to Market**

Creation, production, and implementation of brand activities across channels.

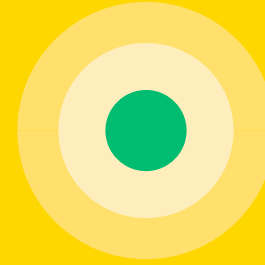
#### **Measuring and Learning**

Measuring the results and return of the marketing investments as well as the causes for the performance.



### Preparing your brand Preparing your organization

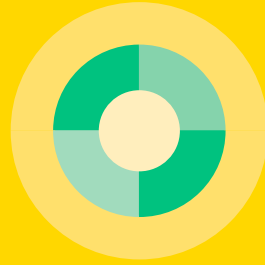
This support system includes activities managers should consider in preparing their brand and their organization for purpose because they can create necessary conditions for success



### Preparing yourself Leadership Behaviors

These are behaviors that marketing directors should consider to prepare themselves to lead a purpose-based brand.

## Preparing the work



1. Understanding the market
2. Designing the offering
3. Going to market
4. Measuring and learning



# 1. Understand the market

## Provoke mindfulness, not just centricity

Customer centricity is an increasingly critical aspect of marketing management. Over time, we have been trained to understand people as consumers. However, when competing on purpose, managers seek to also understand consumers as people by noticing, studying, and considering their broader needs, as well as those of stakeholders.

### PRACTICES

#### **Understand constituents and tension points, not just consumers and pain points.**

- Understand non-commercial stakeholder
- Stay on top of social trends
- Know the social tensions concerning your consumer

#### **See the relationships, not just the parts**

- Manage consistency and contradictions
- Be sensitive to the voice/tone of the social
- Plan for things to go wrong
- Understand supplier risks



## Understand constituents and tension points, not just consumers and pain points.

### 1. Understand non-commercial stakeholder

When understanding the market, managers need to not only study the needs of commercial stakeholders (e.g. consumers, customers, shareholders), but also study the needs of non-commercial stakeholders (e.g. NGO's, regulators, advocates, and people impacted or interested in the social need). Ultimately, the brand must create a map of all key stakeholders necessary for the success of a social purpose initiative and a list of the most pressing needs they need to serve along the way.

MARKETING DIRECTOR




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“ IF YOU DON'T BECOME AWARE OF THOSE UNINTENDED CONSEQUENCES YOUR RISK IS GOING TO GO UP MUCH HIGHER AS WELL AS THE CHANCE OF YOUR BUSINESS BEING DISRUPTED BY OTHER STAKEHOLDERS WHO EITHER BOYCOTT OR DISRUPT YOUR PROGRAM. ”

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“ WE REALLY NEED TO THINK MUCH BROADER THAN WE'VE HAD TO IN THE PAST BECAUSE THE MARKETPLACE DEMANDS IT. AND IT'S NOT JUST THE PURCHASE THAT MATTERS. ”



SUSTAINABILITY DIRECTOR



## 2. Stay on top of social trends

Internal research teams, managers, and agencies are good at tracking competitors and staying on top of the latest trends in the industry. When competing on purpose, managers must also seek to stay on top of the evolution of purpose-based marketing, in particular, by tracking new forms of engaging the consumer with social programs.

MARKETING DIRECTOR



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*“ WE LOOKED AT CASES LIKE THE LUCKY IRON FISH PROJECT, OR WHAT NIVEA IS DOING TO PREVENT SKIN CANCER. WE LOOKED AT HOW VOLVO AVOIDS ACCIDENTS WITH BICYCLES. IT’S REALLY IN ITSELF A HUGE PROCESS TO MAKE SURE YOU HAVE ALL THE STIMULI. ”*

## 3. Know the social tensions concerning your consumer

What type of customer understanding do you focus on? Traditional marketers focus primarily on understanding the needs of customers and actions by competitors. Purpose-based marketers are expanding the meaning of customer understanding and seeking to paint a more complete picture of the person based on their motivations, concerns and interests, rather than simply focusing on their role as a buyer or user of a product.



## See the relationships, not just the parts

### **4. Manage consistency and contradictions**

Managing consistency across brand activities is a foundational aspect of marketing. However, when CSP, the risk of contradictions is greater. When claiming a social benefit, consumers and stakeholders are likely to be more attentive to other actions by the brand or firm that may contradict the social efforts. Therefore, managers must be proactive in identifying and reducing (or eliminating) potential contradictions as a way of managing the risks of criticism.

### **5. Be sensitive to the voice/tone of the social need**

Knowing the value, values and voice of a brand is an essential part of brand management. Yet, when CSP, that is not enough. The managers need to have a similar sensitivity for the social need as well as the values and voice of the people involved in it.



## 6. Plan for things to go wrong

Traditional marketing programs require a detailed activation plan. However, given today's digital and social media landscape, managers must also be prepared to act and adjust depending on the market response. This is even more important for purpose-based competition given the larger number of stakeholders involved and the diverse set of needs. Therefore, it is important to complement the traditional activation plan with scenario plans that anticipate possible unintended consequences of the program and have actions in place to prevent or respond to activities that may threaten the success of the brand.

MARKETING DIRECTOR



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*“ I THINK THERE IS ALSO SOME BASIC THINGS, I DON'T KNOW IF IT IS LIKE A CHECKLIST OR WHATEVER, BUT HAVE YOU THOUGHT ABOUT PACKAGING? HAVE YOU THOUGHT ABOUT WATER? HAVE YOU DONE ENOUGH – YOU DON'T HAVE TO DO IT, BUT HAVE YOU THOUGHT OF THESE ADDITIONAL AREAS OF IMPACT. ”*

## 7. Understand supplier risks

A brand or product manager's core job is understanding their supply chain's ability to deliver their product or services within the quality specifications. When competing on purpose, managers need to also assess the supplier risk based on their environmental or community practices to ensure they are consistent with the brand purpose or work standards.





## 2. Design the offering

### Translate to integrate

Many managers know that in order for social purpose to work, it must be integrated with the brand's business needs. Yet, the integration can be hard given the newness and complexity of social needs. In our study we find that active translation and education are critical for integration. This means describing the social issues and opportunities in language and concepts the organization already understands and values, as well as actively educating key stakeholders along the way.

#### **PRACTICES**

##### **Experience, not just present the opportunity**

- Create prototypes to guide the strategy
- Use ethnographic briefing
- Focus on education, not just presentation

##### **Focus on problem framing, not just problem solving**

- Clarify the business logic
- Help others see the innovation potential of purpose
- Avoid framing purpose as long term
- Think of sustainability and purpose as a new type of R&D

##### **Engage inside**

- Translate claims into benefits
- Design ways to engage your salesforce
- Plan for internal engagement

##### **Understand the opportunity cost**

- Use derived research methods
- Test vs. best alternatives



## Experience, not just present the opportunity

### 8. Create prototypes to guide the strategy

CSP involves topics of environmental or community problems and actions which are often new to many managers. These issues have not been part of their training or upbringing. Therefore, it is sometimes difficult to conceptualize the implications of a social purpose strategy without seeing the specific programs. As a result, effective managers use prototypes of marketing tactics in their engagement of senior leaders on the strategy of purpose.

MARKETING DIRECTOR



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*“IT’S INCREDIBLY HARD. WHEN YOU’RE TRYING TO CHANGE THE BUSINESS MODEL, YOU’RE TRYING TO CHANGE THE PRODUCT, YOU’RE TRYING TO CHANGE THE CULTURE, YOU’RE TRYING TO CHANGE THE BACK OFFICE, ALL AROUND SOCIAL AND ENVIRONMENTAL GOOD... THAT’S SUPER HARD TO DO. THERE’S TIMES FOR BUILDING THE COALITION INTERNALLY, BUT THERE’S ALSO TIMES TO BE THAT LITTLE, SMALL AGILE SPEEDBOAT THAT CAN GET UP FRONT.”*



### 9. Use ethnographic briefing

Most brand strategies result in project briefs used by internal or external partners to create work. The briefing process uses presentations or documents with information about the business needs and the required deliverables. However, oftentimes they are based on activities and issues that are familiar to the working partners. Social needs and issues are different from the business norm and require a more experience-based method for briefing work. Pioneers of purpose are using ethnographic briefing - leading trips to the areas of need or facilitating experiences that allow partners to see for themselves the need before their work starts.

SUSTAINABILITY DIRECTOR




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*“ I ACTUALLY TOOK THE MARKETERS TO IOWA. TO THE FARM, TO TAKE THEM THRU A DAY LONG SESSION AROUND SOY BEANS. I THINK A LOT OF US UNDERESTIMATE THE IMPACT OF DOING THINGS, RESEARCHING THINGS, AND THEN EXPERIENCING THINGS. IT'S A BIG DIFFERENCE. ”*

### 10. Focus on education, not just presentation

The education of internal stakeholders on the social need, as well as the link to the brand strategies and goals, is an important aspect of creating the support system for purpose-based marketing.

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*“ ONCE WE GET OUR MARKETERS PERSONALLY TO GO FURTHER UP THE SUPPLY CHAIN, VISIT THE PACKING VENDORS, VISIT THE FARMERS, IT HAS A HUGE IMPACT. ”*



SUSTAINABILITY DIRECTOR



## Focus on problem framing, not just problem solving.

### 11. Clarify the business logic of the brand purpose

Marketing leaders seeking to integrate purpose need to clarify the business logic of a purpose-based strategy. In particular, how and why will creating social benefits lead to growth? An important enabler of value creation and internal engagement was the focus by teams on identifying social benefits with a clear overlap with brand or business needs. The needs could relate to market expansion opportunities, line extensions, or strengthening of core attributes. However, once the overlap was made clear, the purpose-based strategy faced greater support.

BUSINESS DIRECTOR




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*“ I NEVER WON A CLIENT BECAUSE OF OUR SOCIAL PURPOSE WORK. HOWEVER, OUR SOCIAL WORK ALLOWS US TO BE A MORE RELIABLE PARTNER - AND THAT IS WHY WE WIN BUSINESS. ”*

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*“ MY INITIAL ASSUMPTION WAS TO CREATE A PRODUCT, AND MAKE IT SUSTAINABLE, AND THEN THERE WOULD BE PEOPLE READY TO BUY IT, AND PEOPLE WOULD AUTOMATICALLY UNDERSTAND THAT THIS IS A GOOD PRODUCT AND PICK IT UP OFF THE SHELF. I DID NOT UNDERSTAND THE BRANDING SIDE AS WELL AS I SHOULD HAVE. ”*



BUSINESS DIRECTOR



## 12. Help others see the innovation potential of purpose

Discussions of innovation, market disruption, and competitive advantage are often used by purpose leaders. They acknowledge the moral responsibility that sometimes motivates action, but do not rely on moral or responsibility arguments to design or promote their initiatives. They defend the business need as strongly as the social benefit. Also, entrepreneurship and social purpose often go hand in hand, by crafting innovative ways of contributing to a social need and integrating it into the product offering.

SUSTAINABILITY DIRECTOR



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“ HE WANTED A CONVERSATION THROUGH THE LENS OF BUSINESS STAKEHOLDERS ON SUSTAINABILITY AND HOW WE MAKE IT A CONSUMER THING, HOW WE MAKE IT A BUSINESS THING. ”



### 13. Avoid framing purpose as long term

Importantly - avoid framing the business in terms of return times (e.g. Short term vs. Long term). Pioneers of purpose are using the social benefits of their brands to achieve their yearly goals. By challenging themselves and their teams to use purpose as an enabler of their short term needs, they engage internal stakeholders needed for their success.

MARKETING DIRECTOR




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*“ BECAUSE WE DO HAVE TO DRIVE SHORT TERM SALES, YOU GOT TO GO CONVINCING YOUR LOCAL TEAM AND MARKET THAT THIS IS GOING TO MEET THEIR NEEDS THIS YEAR. AND IT’S GONNA DRIVE SOME VOLUME FOR THEM. ”*

### 14. Think of sustainability and purpose as a new type of R&D

Sustainability and social benefits are a new form of product claim to create customer value. As a result, they serve a similar function to the one performed by the R&D department.

SUSTAINABILITY DIRECTOR




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*“ I WOULD LIKE TO THINK THAT WE ARE A NEW KIND OF R&D FOR EVERYTHING FROM INGREDIENTS TO MANUFACTURING TO DISTRIBUTION. ”*



## Engage inside

### 15. Translate claims into benefits

Your social actions need to be translated into clear benefits that matter to your partners. For instance, your partners may not be motivated by an environmental protection claim, but might see value in efforts to protect wildlife that sustain hunting practices. Find the value to your partners of your social benefits.

MARKETING DIRECTOR



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“ EXPRESS THE SOCIAL MISSION IN A WAY THAT ALIGNS IT TO THE SAME JOB TO BE DONE, WHATEVER THAT PRIORITY JOB TO BE DONE IS IN THE MARKET. ”



### 16. Design ways to engage your salesforce

Purpose-based programs are different from the type of initiatives that sales teams are used to presenting and explaining to customers. As a result, marketing managers who lead the brand need to pay particular attention to the training and support of the sales teams if/when a purpose program becomes mainstream. An important element of this training is the clarification of a business logic that can help sales teams explain in simple terms the reasons for the investment and how it can benefit their customers.

### 17. Plan for internal engagement

The engagement of internal stakeholders is always an important part of successful marketing planning, but it is even more critical for purpose-based programs. Leaders of purpose are proactive in reaching out to internal stakeholders and looking for ways to connect the purpose related activities to the needs and priorities of others in the organization.

SUSTAINABILITY DIRECTOR




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“ WE HAVE ROLLED OUT AN AWARENESS CAMPAIGN INTERNALLY FOR INTERNAL TARGETING. I PRESENTED TO THE SALES AND MARKETING TEAMS OF THE MAJOR BUSINESS UNITS TO JUST SURELY RAISE AWARENESS ABOUT OUR PROGRAMS. ”

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“ WE KIND OF DID A ROADSHOW FOR MOST COUNTRIES. PEOPLE WERE REALLY PROUD, PEOPLE REALLY FELT LIKE WE WERE DOING WHAT WE SHOULD BE DOING. THAT GAVE THEM NEW CONFIDENCE WITHIN THE COMPANY. ”



SUSTAINABILITY DIRECTOR





## Understand the opportunity cost

### 18. Use research methods that reveal, rather than report, preferences

Research into consumer preferences has traditionally relied on claimed attitudes. However, social benefits can induce bias that leads to over or under representation of its potential. Also, declared methods to measure preference can undermine the value of emotional effects of a social claim. Therefore, when studying purpose related claims, managers should use derived methods of consumer research such as conjoint, choice models, and field experiments.

MARKETING DIRECTOR




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*“ I THINK OUR CURRENT RESEARCH METHODS ARE PENALIZING SOCIAL PURPOSE WORK, BECAUSE THEY ARE VERY RATIONAL IN THEIR UNDERSTANDING OF CONSUMERS. WE SHOULD LOOK MORE AT ACTUAL BEHAVIOR. ”*

RESEARCH DIRECTOR




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*“ WE’RE DOING MUCH MORE QUALITATIVE AND MORE ETHNOGRAPHIC RESEARCH - BEHAVIORAL RESEARCH. ”*



### 19. Test vs. Best alternatives

It is not enough to test the ideas or programs related to the social purpose of the brand with consumers. Leaders tested their purpose-based concepts vs. their best alternatives before approving the plan and investment.

MARKETING DIRECTOR



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“ WE TESTED THE [PURPOSE WORK] THE SAME WAY WE WOULD TEST A PRODUCT CAMPAIGN. WE DID ADVERTISING TESTING. WE DID MARKETING MIXED MODELING. HELD IT UP TO ALL THE SAME STANDARDS INTERNALLY IN ORDER TO KNOW IF IT WOULD WORK. AND IT DID BETTER. IN THE BEGINNING I WAS AFRAID TO TEST IT, BUT DOING THIS HELP THE WORK GET MORE CREDIBILITY INTERNALLY. ”



## 3. Go to market

### Design the right model, not just the right message

The social purpose of a brand can become a critical aspect of its value proposition, but it should not be the only one. Knowing when and how to compete on purpose is as important as finding the right stories to share with consumers about the brand.

#### PRACTICES

##### **Select an integration model**

##### **Find the right segments**

- Understand effect on specific consumer segments

##### **Find the right moments**

- Leverage micro-targeting
- Consider starting with digital
- Find the right moments across the customer journey

##### **Create content assets, not just ads**

- Build inventory of content assets
- Prepare to curate stories
- Find the right messenger

##### **Think of activism, not just activation**

- Invite others to join
- Use activism, not just activation
- Think of engaging communities, not just consumers



## 20. Select an integration model

Purpose-based programs are often associated with highly visible initiatives such as Dove’s “Real Beauty” or Always “Like a Girl” campaign. However, our research finds four different integration models used by brands, all of which are associated with strong performance. The engagement-based model, the practice-based model, the product-based model, and the externality-based model. Selecting the right model for a brand is an important initial step in the planning for purpose and it helps define the role the brand will play in serving the social need.

# Find the right segments

## 21. Understand effect on specific consumer segments

An important step in the design of the offering is determining which specific consumer segment of the market is considering social purpose in their choice criteria and if the benefits of competing for their business outweigh the costs of CSP. In addition, a number of leaders of purpose-based brands are using a combination of lifestyle and behavioral segmentation to define the segments.



## Find the right moments

### 22. Leverage micro-targeting

Technology has allowed marketers to efficiently target smaller consumer groups. This possibility is often applied by brands with purpose; rather than carry out a mainstream market strategy, they focus on micro-targets for whom their social benefits create the most value.

MARKETING DIRECTOR



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*“ WE LAUNCHED FIRST IN FACEBOOK, TARGETING DIFFERENT PROFILES OF PEOPLE AND DOING VERY ACTIVE SOCIAL LISTENING TO SEE HOW PEOPLE RESPONDED IN REALITY. MORE THAN 80% OF THE COMMENTS WERE POSITIVE, WHICH GAVE US THE CONFIDENCE TO EXPAND THE PROGRAM. ”*

### 23. Consider starting with digital

Purpose-based programs run the risk of not always appealing to the mainstream or larger market segments. As a result, managers increasingly view digital channels as the place to initiate their integration of social benefits into the brand. This allows for much needed experimentation on how to best engage consumers and communicate the brand actions before expanding resources and exposure.



#### 24. Find the right moments across the customer journey

Managers mention their desire to integrate purpose into “everything that the brand does.” Yet, leading purpose-based brands are more strategic when determining when the social benefits are embedded in the brand’s consumer facing activities. Depending on their model and the role that social benefits play in influencing purchase, some brands focus the integration in the early stages of the customer journey. Others focus it toward the end of the journey during the moment of purchase or even after purchase.

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“PURPOSE IS NOT THE ONLY THING THAT WE WILL DO WITH THE BRAND. WE WILL ALSO HAVE PROGRAMS TO HIGHLIGHT OUR PRODUCT BENEFITS, OR SPONSORSHIPS. THERE ARE TIMES IN THE CUSTOMER JOURNEY WHEN PURPOSE CAN HELP THE CUSTOMER CONSIDER US, BUT THERE ARE OTHER TIMES WHEN OUR MESSAGE NEEDS TO BE ABOUT THE PRODUCT.”



MARKETING DIRECTOR



## Create content assets, not just ads

### 25. Build inventory of content assets

When done right, purpose can generate interest in the brand beyond the product. However, the organization of brand communication is different than traditional forms. Pioneers of purpose are investing in creating content assets to support an ongoing stream of stories, information, reporting, and engagement mechanisms for different types of consumer segments. Long form stories, blogs, short messages, people-generated content, infographics, and many other tactics are being used and often deployed through brand owned channels. The brand plays a peripheral role in this information exchange, with the emphasis on the social need and solutions.

### 26. Prepare to curate stories

As social benefits and actions begin to add up, it is important to have a method for curating messages and organizing them into a simple narrative for the brand. Otherwise, the communication can become fragmented and difficult to manage.



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“THE CONTENT DEVELOPMENT WAS MORE INTERNAL. WE HAVE AN INTERNAL CREATIVE STUDIO. THEY DEVELOPED THE BRANDING, WE ALSO WORK WITH THE INTERNAL TEAMS ON ENSURING THAT THE TARGETS WERE ALL EFFECTIVE. WE BROUGHT IN AN AGENCY HELP CHECK WHAT WE WERE DOING WAS INTERESTING WHEN COMPARED TO THE REST OF THE MARKET.”



MARKETING DIRECTOR

## 27. Find the right messenger

In traditional marketing, most product messages are delivered by the brand. However, the growth of social media has made it possible to involve influencers in the content and delivery process. One important consideration when crafting a purpose message is the decision on who should create and deliver it? Should it be the actual managers of the brand, rather than the brand itself? Should it be NGO partners? Deciding factors include the brand's potential influence, as well as the assurance that the message will be received with the authenticity it deserves.

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“WHEN IT COMES TO PURPOSE, SHOULD OUR BRAND MANAGERS BE SPEAKING DIRECTLY TO OUR CONSUMERS AND STAKEHOLDERS, RATHER THAN THROUGH THE BRAND? SHOULD THEY, IN THEIR TWITTER FEED OR FACEBOOK PAGE, TALK ABOUT WHAT WE CARE ABOUT AND WHAT WE ARE DOING, AND INVITE THE COMMUNITY THAT ARE PASSIONATE ABOUT THE SAME CAUSE AS US TO PARTICIPATE?”



MARKETING DIRECTOR





## Think of activism, not just activation

### **28. Invite others to join**

In traditional marketing plans, managers work hard to secure exclusive benefits or rights. However, the pursuit of exclusivity may be counter to achieving a social goal. As a result, CSP managers need to find ways of creating value for the brand without prohibiting others from engaging in similar actions that could prevent progress in the social need.

### **29. Use activism, not just activation**

Storytelling is a foundational part of communicating social and brand benefits. Yet, pioneers of purpose often use their communication as a form of activism, building into their plans numerous mechanisms for consumers or interest groups to get involved and play a role in addressing the social need. Rather than communicating actions by the brand, this strategy enables/encourages actions by people. Traditionally, marketers think of “activation” as bringing the brand idea to life through different channels. CSP requires activism which promotes involvement and action to solve a social need.



## 4. Measurement and learn

### Measure in 4-D

Marketing measurement resources are often focused on 2-dimensional measurement which is defined as understanding the return on investment for an activity and the impact on consumer attitudes towards the brand. In order to compete on social purpose, managers are instead adopting 4-dimensional measurement protocols to include the impact on the social need and the effect on employees. Measuring in 4d is needed to understand the full effect of spending on purpose.

#### PRACTICES

- Measure the societal impact of your brand
- Measure positive and negative brand attributes
- Measure societal brand benefits
- Measure societal brand benefits



### **30. Measure the societal impact of your brand**

In order to support the credibility of the brand involvement and generate additional value claims for consumers, adopting a social benefit requires the selection of social goals and measurement of the social impact. This can be a new practice for managers who previously focused solely on brand-only outcomes.

### **31. Measure positive and negative brand attributes**

Most consumer brands measure the level of development of key attributes in the mind of their customers. However, they tend to focus on attributes that influence purchase, rather than attributes that may prevent it. Understanding brand attributes is important when CSP because reducing them could be part of the goal of purpose-based investments.

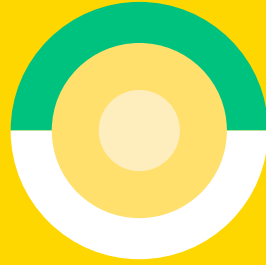
### **32. Measure societal brand benefits**

There is a need to measure the social impact on the brand, not just the brand impact on society. Brand managers are trained to identify and grow attributes that matter to consumers. These attributes can be of functional, monetary, or psychological nature (e.g. symbolic or identity benefits). CSP also creates the possibility of establishing societal attributes and benefits for a brand. Importantly, if unmeasured, the value created by these attributes will go unnoticed or be misunderstood. Therefore, managers are adding social attributes and benefits to their definition of brand equity metrics.

### **33. Measure the impact on employee engagement**

An important contribution of social purpose investments is the effect it can have on the employee workforce, not only in motivating current team members, but also in attracting and recruiting top talent to work on a brand. If unmeasured, it can become a significant aspect of the business effect that will go unnoticed and unrecognized

# The support system



## 1. Prepare your brand

### PRACTICES

- Start with a clear value proposition and brand architecture
- Define a social purpose and mission for your brand
- Define the brand role in the social need
- Integrate into your brand management framework



### 34. Start with a clear value proposition and brand architecture

Clarity on the brand positioning and architecture is necessary to find the right social purpose and social benefits. The search for a social purpose should not be used to search for clarity on the value proposition of a brand, but instead should help empower it.

SUSTAINABILITY DIRECTOR




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*“ THEY HAD THIS IDEA, TO CREATE A WEBSITE AND TALK ABOUT IT, BUT YOU NEED TO GO TALK TO THE COMMUNITY AND GET ON THE GROUND, FIGURE OUT WHAT THEY ACTUALLY WANT. THEY MIGHT NOT EVEN WANT YOUR HELP. ”*

### 35. Define a social purpose and mission for your brand

Many brands are owned by companies with a long history of strong CSR performance and important progress on sustainability goals. However, sometimes managers think of CSP as an effort to use the brand resources to make consumers aware of the company social programs. CSP is based on the strategic selection of a social purpose – that is, the focal social need to serve, which may or may not be the same as the corporate level CSR agenda. They also identify a specific social mission which is their way of acting on their purpose at a given time and market. For instance, the social purpose of Vaseline is to bring the healing power of their product within reach of those with the greatest need. This is acted upon differently in South Africa and the USA through locally relevant social missions.



### 36. Define the brand role in the social need

Brands grow by solving consumer problems better than their competitors. When CSP, brands have to change this outlook and realize that they are not going to (and cannot) solve a social problem without the participation of the broader community of interest. Therefore, they have to identify a specific role to play within a broader community effort to resolve the social need. To do so, they have to change their mindset from “problem solver mindset” to “contributor mindset.”

SUSTAINABILITY DIRECTOR



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“THE KEY THROUGH THIS PROCESS IS THE BRANDS, THE MARKETERS HAVE TO OWN IT. THE MARKETERS HAVE TO ESCORT THEIR BRANDS THROUGH THE ROOMS OF THEIR HOUSE AND REALLY FEEL THE PROCESS. AND DON'T FEEL LIKE THIS IS BEING DONE TO THEM. IT IS BEING DONE WITH THEM, FOR THEIR BENEFIT.”

### 37. Integrate into your brand management framework

Lasting purpose-based efforts are supported by the presence of a simple yet meaningful statement that helps the organization sustain alignment and clarify their ultimate goals. This could be phrased as a mission or a belief about the world. When you make the social purpose part of your “positioning” instead of just a program, it becomes easier to integrate into the brand activities.

# The support system



## 2. Prepare your organization

### PRACTICES

Set a deadline

Plan together

Leverage your data science capabilities

Set ambitious goals

Look for leaders as advocate

Break away from the matrix

Include specialized partners

Sustainability team as strategic partner



### 38. Set a deadline

Traditional marketing initiatives tend to be organized around a calendar of activities or innovation with fixed timelines and deadlines. However, purpose-based initiatives may not have as clearly defined time dimensions. Therefore, purpose pioneers proactively impose time constraints and deadlines to help stimulate the necessary attention and pressure for the work to move forward and eventually get to market.

### 39. Plan together

The traditional marketing role of the PR, sales/operations, and sustainability functions is to help amplify a plan or provide a seal of approval at the end of the marketing process by assessing the risks involved with different programs. However, when CSP, the sustainability, sales/operations, and PR functions are often part of the core development team and involved from the beginning of the planning process.

### 40. Leverage your data science capabilities

Leaders of the sustainability teams are hiring data analysts and scientists to meet the needs of the marketing and business functions for greater data on the issues as well as the progress.

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“THE MOST COMMON QUESTION THAT WE GET IS, IS THIS GENUINE,? CAN I SAY THIS, IS IT TRULY SUSTAINABLE, CAN YOU PROVIDE US MORE DATA? BECAUSE THEY WANT DATA JUST AS MUCH AS WE DO. THAT’S WHY I HIRED THIS DATA ANALYST, THIS SUSTAINABILITY ANALYST, BECAUSE WE NEED ALL OF THAT, WE NEED THE CREDIBLE, VERIFIED, TRACEABLE INFORMATION.”



SUSTAINABILITY DIRECTOR





#### 41. Set ambitious goals

Setting specific goals with measurable milestones and high ambitions is a common element of successful purpose-based programs. Increasingly, the United Nations development goals have become the framework to organize action.

#### 42. Look for leaders as advocates

Progress in sustainability and social purpose has been enabled by the courage and vision of leaders from Ray Anderson to Paul Polman. Leadership conviction and support was and continues to be a necessary condition for success. However, it is important to ask leaders to go beyond support, and in fact champion change by making public proclamations about the role of social purpose in the growth strategy and freeing up resources (time, money, and risk taking) to make it happen.

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*“THERE’S A COMMITMENT TO THE FACT WE SUPPORT THESE MESSAGES AND OUR CEO ESTABLISHED A RULE OF SPENDING 10% OF MEDIA MONEY ON THE SPECIFIC ASPECT OF OUR SOCIAL BENEFIT.”*



MARKETING DIRECTOR



### 43. Break away from the matrix

The responsibility of CSP cannot be given to a particular function. The effort often requires very close collaboration across different functions. Successful CSP efforts have formalize the cross-functional dependency by creating special boards or steering committees where plans are evaluated and decisions are made.

MARKETING DIRECTOR




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“ THE TASK FORCE MODEL, THAT’S HOW I HAVE BEEN SUCCESSFUL IN ALL THE PROGRAM. I WORK VERY MUCH ON A TASK FORCE MODEL WHERE I WORK THE DIFFERENT BUSINESS UNITS OR FUNCTIONS TO EXECUTE WHATEVER OUR INITIATIVE IS. ”

### 44. Include specialized partners

Engaging consumers with a social purpose requires a deep understanding of the social issue, the stakeholders involved, and the boundaries within which the brand can act. Pioneers of purpose have found these skills often reside in either niche agencies or PR firms, rather than in large agencies used for more product-based competition. In addition, the use of PR tools in the form of content assets, blogs, and community formation are growing and sometimes prioritized over traditional advertising solutions.

### 45. Sustainability team as strategic partner

Evolve the role of the sustainability teams from watchdogs to strategic partners in the planning process, management of partners, and implementation of programs.

## The leadership behaviors



### Prepare yourself

#### PRACTICES

**Understand the full impact of your brand**

**Manage passion, not just talent**

**Prepare yourself to lead**

**Manage the tensions**

- Set boundaries for your social claims
- Manage tension between engagement and authenticity
- Integrate the brand voice between product and purpose messages
- Manage the tension between environmentalists and economists



#### 46. Understand the full impact of your brand

Brand and product managers understand the importance of knowing how their products impact customers. However, leading a purpose-based brand also calls for understanding the environmental and community impact of your brand activities across all areas of the value chain. For instance, the lifecycle analysis is a tool often used by people leading purpose-based brands to determine their areas of greatest social impact. Also, it is key to understand how the customers' usage of your product could be contributing to social needs. Both of these type of insights can be the source of innovation opportunities with a purpose.

MARKETING DIRECTOR



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“SO, WE’RE ENCOURAGING OUR MARKETERS TO THINK ABOUT HOW THEIR BRAND POSITIVELY IMPACTS THE COMMUNITY. FROM THE FARMERS, TO THE HEALTH OF THE COMMUNITY. THE LAST PILLAR IS WHAT IS YOUR BRAND DOING TO BENEFIT THE PLANET. HOW IS IT ENHANCING THE PLANET TODAY, BUT FOR FUTURE GENERATIONS?”

**47. Manage passion, not just talent**

Purpose-based initiatives have the potential to ignite your teams. They can attract and engage people from different functions of the business and motivate them to work even if it is outside their traditional responsibility or compensation. As a leader, you have a unique responsibility to manage this passion - to point it in the right direction, seeking the right balance of commercial and social goals. Purpose-based programs should not give a team the right to invest without rigor on understanding returns. Also, people will be driven by passion for a while, but if not properly recognized, their motivation could lead to disappointment. Ensure your team's efforts are not going unnoticed and unaccounted in the broader performance system of the firm.

**48. Prepare yourself to lead**

Many of the pioneers of purpose have hybrid experiences between social entrepreneurship and traditional marketing. Having firsthand experience working at or closely with NGOs can make an important difference in your ability to become a good partner.



## Manage the tensions

### 49. Set boundaries for your social claims

When CSP, the tendency to story tell, augment, amplify, or enlarge, often risks the loss of credibility and authenticity. It is important to manage the size of the claim; keep it connected to the original intention and resist the temptation to augment the meaning of your benefit.




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*“ HOW MUCH GOOD DO I HAVE TO DO? ONCE I START TO OFFER A SOCIAL BENEFIT, I DON'T KNOW WHERE TO STOP BECAUSE IT SEEMS LIKE IT WOULD NEVER BE ENOUGH. IF WE HELP SAVE ONE RIVER, IS THAT ENOUGH, OR DO WE NEED TO SAVE 50 RIVERS? ”*

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*“ WE WERE TEMPTED TO KEEP ADDING MEANING TO OUR SOCIAL PURPOSE, BUT THE BIGGER THE MEANING, THE MORE DISTANT IT BECAME FROM OUR PRODUCT AND OUR VALUE PROPOSITION. I HAD TO KEEP THE TWO CLOSE TOGETHER. ”*



MARKETING DIRECTOR

### 50. Manage tension between engagement and authenticity

Set guidelines that can help your team manage the tension between the voice of the brand and the voice of the social need. Agency partners may be used to creating content that can get consumers' attention, but they are less knowledgeable on how to communicate a social benefit.



### 51. Integrate the brand voice between product and purpose messages

One of the most pressing challenges affecting pioneers of purpose is the integration of different type of messages under one brand voice. Brands sometimes adopt a very different tone when describing their social actions than when they are communicating product benefits. This difference may reduce the total impact of brand spend. Finding a way of communicating both messages that builds a common set of brand benefits and identity is a key part of CSP.

SUSTAINABILITY DIRECTOR




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*“ I WOULD ARGUE THAT THE REPRESENTATION OF THE WORK IS SPORADIC AND IS IN SOME WAYS I THINK, IN CONTRADICTION TO [OUR BRAND]. YOU KNOW, FOR ME, IT APPEARS THAT WE [COME ACROSS AS A COMPANY] WITH TWO KIND OF REASONS FOR EXISTING. ONE IS THE FACT THAT WE ARE AN ETHICAL BUSINESS AND WERE CREATED AS SUCH. THE OTHER IS THAT WE ARE A COMMERCIAL BRAND. AND I’VE SEEN THAT THOSE TWO ELEMENTS ARE PRESENTED SEPARATELY, EVEN TO CUSTOMERS. ”*

MARKETING DIRECTOR




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*“ WE HAVE THE NEED TO COMMUNICATE MANY MESSAGES, NOT JUST PURPOSE. HOW DOES IT ALL FIT TOGETHER AND FEEL LIKE IT IS COMING FROM ONE BRAND. ”*

### 52. Manage the tension between environmentalists and economists

Working on purpose attracts economists (people motivated by the business side) and environmentalists (people motivated by the community side). As the leader asks for greater rigor on the business value, the environmentalists may disengage because to them this is not about value but about values. Seeking to manage that tension is important to keep the team motivated and working towards the goals.



## **Prepare your work**

### **Understand the market**

01. Understand non-commercial stakeholder
02. Stay on top of social trends
03. Know the social tensions concerning your consumer
04. Manage consistency and contradictions
05. Be sensitive to the voice/tone of the social need
06. Plan for things to go wrong
07. Understand supplier risks

### **Design the offering**

08. Create prototypes to guide the strategy
09. Use ethnographic briefing
10. Focus on education, not just presentation
11. Clarify the business logic of the brand purpose
12. Help others see the innovation potential of purpose
13. Avoid framing purpose as long term
14. Think of sustainability and purpose as a new type of R&D
15. Translate claims into benefits
16. Design ways to engage your salesforce
17. Plan for internal engagement
18. Use derived research methods
19. Test vs. best alternatives

### **Go to market**

20. Select an integration model
21. Understand effect on specific consumer segments
22. Leverage micro-targeting
23. Consider starting with digital
24. Find the right moments across the customer journey
25. Build inventory of content assets
26. Prepare to curate stories
27. Find the right messenger
28. Invite others to join
29. Use activism, not just activation

### **Measurement and learn**

30. Measure the societal impact of your brand
31. Measure positive and negative brand attributes
32. Measure societal brand benefits
33. Measure the impact on employee engagement



## **Prepare your brand**

34. Start with a clear value proposition and brand architecture
35. Define a social purpose and mission for your brand
36. Define the brand role in the social need
37. Integrate into your brand management framework

## **Prepare your organization**

38. Set a deadline
39. Plan together
40. Leverage your data science capabilities
41. Set ambitious goals
42. Look for leaders as advocates
43. Break away from the matrix
44. Include specialized partners
45. Sustainability team as strategic partner



## **Prepare yourself**

46. Understand the full impact of your brand
47. Manage passion, not just talent
48. Prepare yourself to lead
49. Set boundaries for your social claims
50. Manage tension between engagement and authenticity
51. Integrate the brand voice between product and purpose messages
52. Manage the tension between environmentalists and economists



**PRAC  
TICE  
OF PUR  
POSE**

# THE MODELS

What does competing on purpose look like? In citing examples of purpose-based brands, managers referred to brands like Dove or Always. Therefore, to them CSP meant high profile initiatives, with cultural influence, significant promotional resources, and the generation of large levels of public attention. These characteristics may motivate some brand teams, but could also hold other teams back from exploring a purpose-based strategy.

To understand the different approaches used, we created a database of 70 purpose-based programs, most of which were identified during our interviews as important references of CSP. Each program was categorized across 20 different dimensions and a cluster analysis was performed to identify different models used by brands to compete on purpose. The result is the identification of four models that represented the majority of methods used to date, each described below:

1. Engagement
2. Practice
3. Product
4. Externality

## Engagement based model

In this model the brand shifts from advertiser to activists (resembles the work of community activists). It integrates societal need into the “branding” activities of the product and depends on storytelling capability. It also requires close collaboration with NGO community in planning and execution.

Predominant skill: Activism



# Engagement based model



**Focus**



Amplify brand

Amplify product

**Type of social benefit**



Increase positive externality

Increase positive externality

**Brand job**



Change mindsets

Improve people's conditions

**Source of benefit**



Front-end activities

Front-end activities

**Duration**



Long-term

Long-term

**Role in competitive position**



High

High

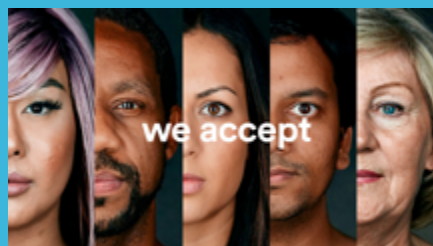
**Examples**



Nike: Equality  
 Tecate:  
 Reducing Gender Violence  
 Always: Like a Girl  
 AirBnB: We accept

Vaseline: The Healing Project  
 Lifebuoy: Help a Child Reach 5  
 Warby Parker:  
 Buy a Pair, Give a Pair

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## Practice based model

This model resembles the work of CSR and Sustainability initiatives. It integrates societal need into the “business practices” of the brand. It centers on operational capability and requires the translation of actions into clear customer benefits. It requires close collaboration with NGOs and Sustainability teams.

Predominant skill: Journalism



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POSE**

# Practice based model



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**Type of social benefit**



Create positive externalities

---

**Brand job**



Improve people's conditions

---

**Source of benefit**



Back-end / product

---

**Duration**



Long term

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**Role in competitive position**



Low

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**Examples**



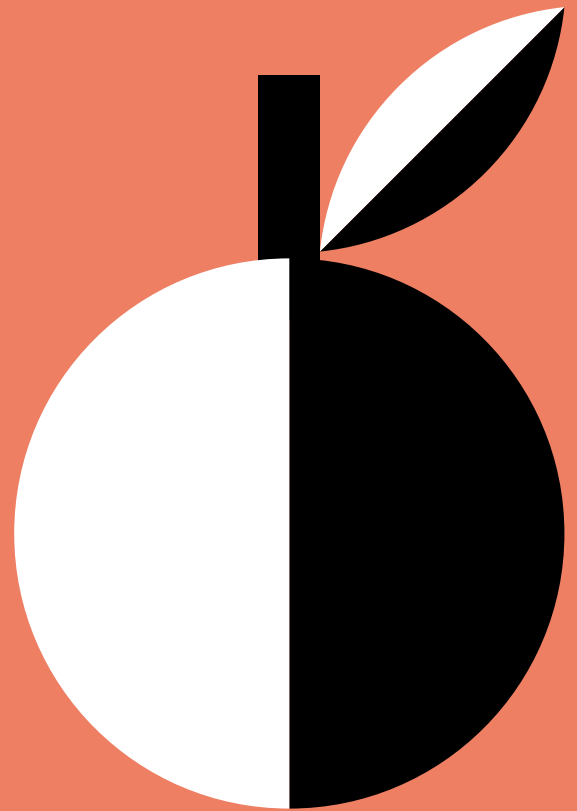
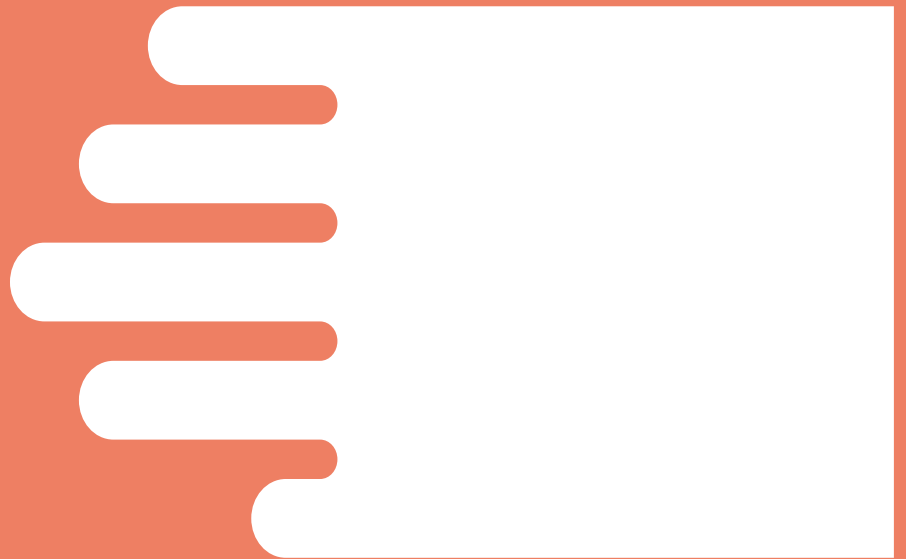
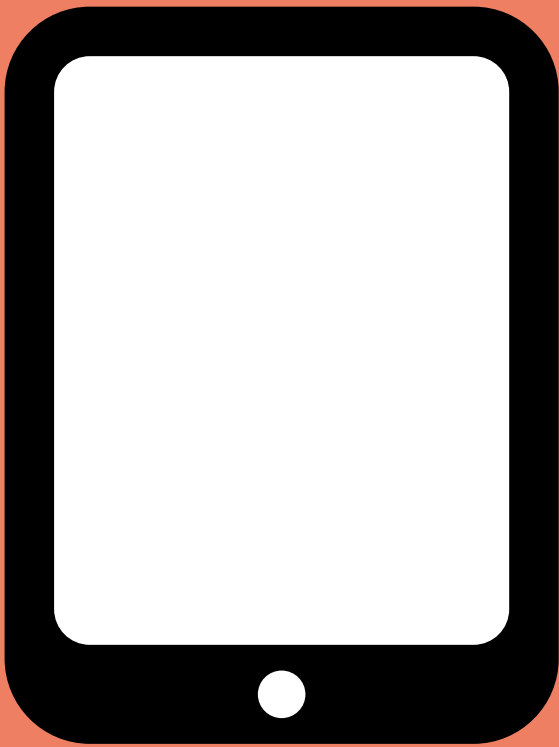
Coca-Cola 5by20  
Starbucks Social Justice Program  
Timberland: Project Kombit  
Nespresso: Fair Trade Coffee



# Product based model

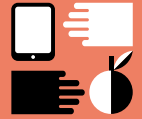
This model resembles the work of Social Innovation and entrepreneurship. It integrates societal need into the “product design” activities of the brand. It centers on product development capability and requires close collaboration with R&D and Sustainability teams.

Predominant skill: Activation





# Product based model



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Type of social benefit  Reduce negative externalities or create positive externalities

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Brand job  Create products or services

---

Source of benefit  Back-end / product


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Duration  Long term

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Role in competitive position  High

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Examples  Honest Tea: Organic Drinks  
Brita: Filtered Water Bottles  
Helman's: Back to Nature  
Head&Shoulders: Ocean Plastic Bottle  
Timberland: Project Thread  
Heineken: Double Zero

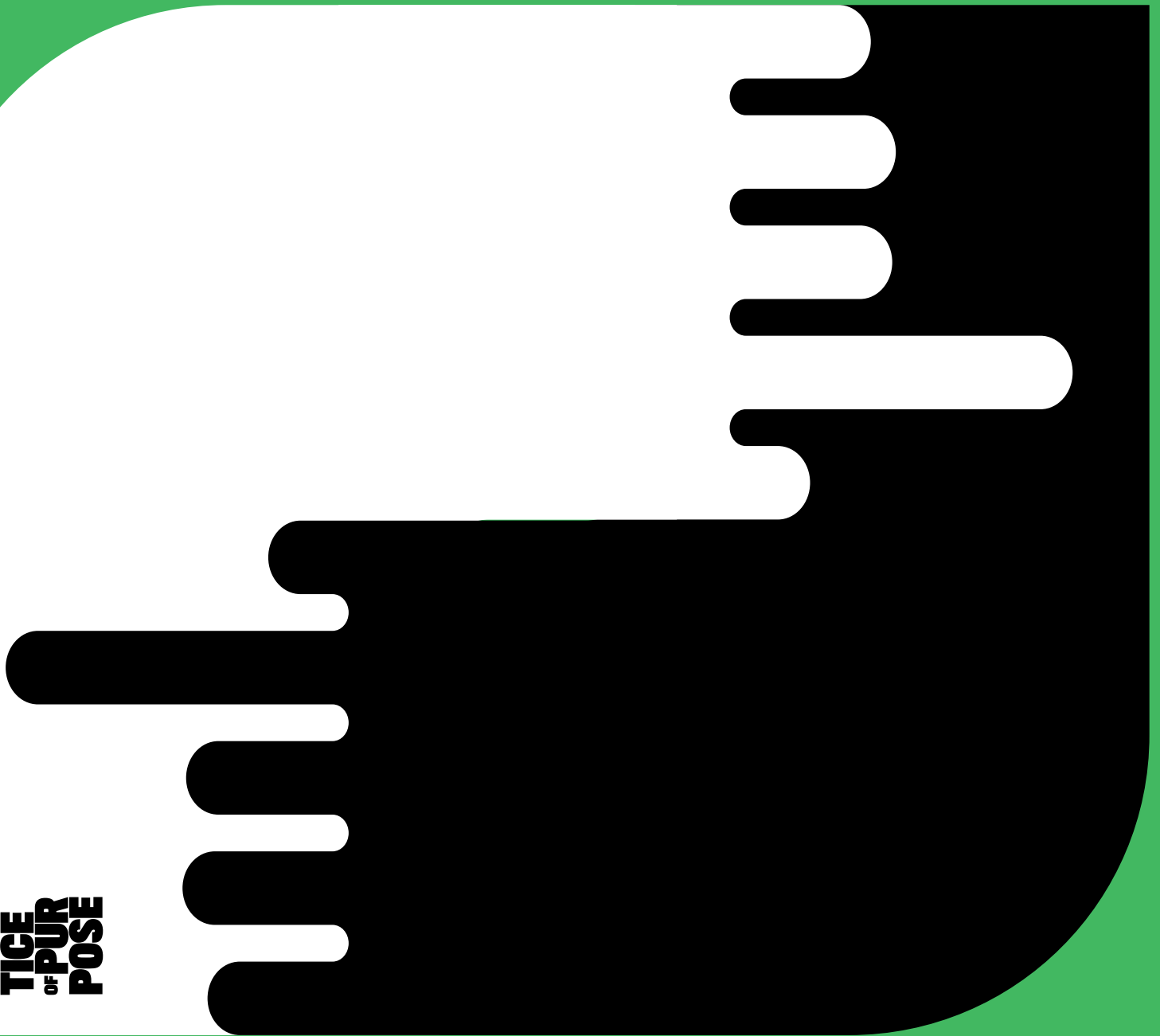


Timberland 

# Externality based model

This model seeks to stimulate more sustainable behavior by the customer. The main benefit happens through product innovation and/or usage. Yet it does not integrate a social benefit into the branding activities of the product. Requires close collaboration with R&D and Sustainability teams.

Predominant skill: Nudging



# Externality based model



Model 3



Implicit

Type of social benefit



Reduce negative externalities

Brand job



Create products or services

Source of benefit



Back-end / product

Duration



Long term

Role in competitive position



Low

Examples



Charmin: 4× Ultra Strong  
Bounty: Select a Size  
Febreze: 3× Small Spaces  
Nike: Flyknit  
Autodesk: Sustainable Design

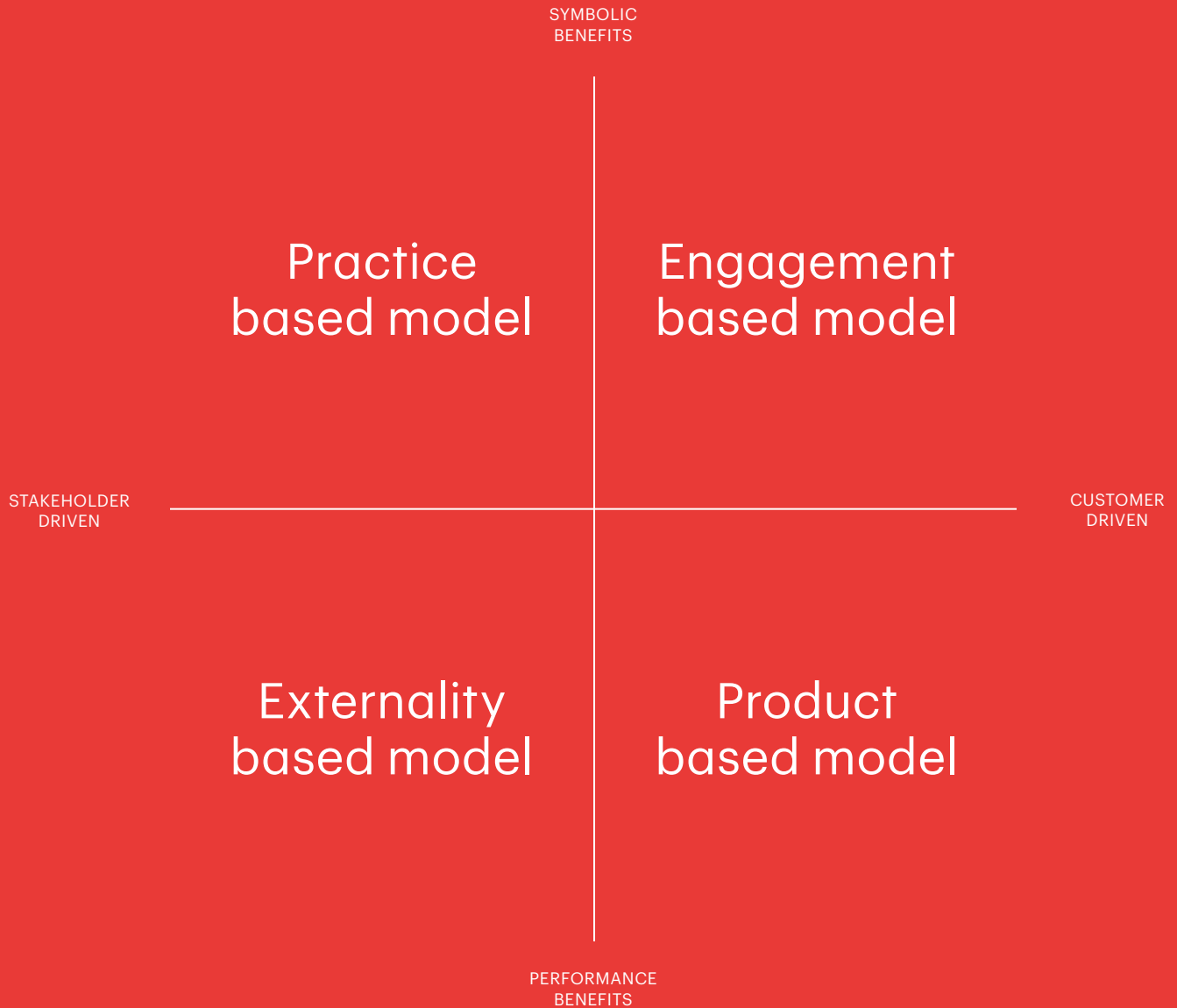


## How do I select the right integration model?

There are two factors that can help simplify the model selection for managers. First is the understanding of what motivates the adoption of a social purpose by a brand. Is it primarily driven by non-commercial stakeholder influence such as NGOs, regulators, community organizations or people in their role as citizens or by the influence or interests of people in their role as consumers or customers? In other words, is the demand coming from the stakeholders or the market? The more the demand is coming from the market, the better it would be to select a model that integrates social purpose in the core activities of the brand and its relationship with consumers.

In addition to the source of the demand, there is the reason for the demand. In other words, how will social benefits relate to the main characteristics people look for when buying products or services in a given category? Existing research has found differences in the effectiveness of social and environmental benefits depending upon the degree in which people are looking for strength vs. gentleness in a product. The preference of products that people buy for strength reasons (e.g. batteries, cleaners, working boots) could be negatively impacted if associated with environmental or community benefits. The opposite effect has been present among products purchased for gentleness characteristics (e.g. baby shampoo, salads, or body creams). Similarly, products that people buy as a way of defining their identity (e.g. luxury goods, fashion goods) may see a more positive influence of social benefits than products people buy for purely utilitarian reasons.

Therefore, the framework below can help managers determine which integration model can be most appropriate given their specific brand conditions:



**Practice-based model**

Focuses on communicating back-end (e.g. operating practices) or front-end (e.g. community practices) activities with specific customer groups and stakeholders.

Predominant skill: Journalism

Brands using this model:

- Avoid mainstream messages.
- Relies on owned communication channels.
- Are motivated by stakeholder pressures or by a social need that is directly connected to their business but not yet of a priority for their customers.
- The social purpose is often a brand articulation of the firm CSR or Sustainability priority.
- The purpose is explicit but not central to the customer experience.
- Brands tend to communicate in the form of stories outside the moment of purchase.
- Easier for Branded Houses than House of Brands.
- Depends on very close collaboration with Sustainability and CSR teams, along with NGOs for implementation.

**Engagement-based model**

Focuses on forms of activism in support of a social need, generating mainstream engagement across multiple stakeholders.

Predominant skill: Activism

Brands using this model:

- Adopts mainstream brand messages
- Are motivated by a market opportunity or consumer trend connected to their growth strategy.
- The social purpose is often based on a cultural tension that relates to their brand heritage and/or externality.
- The purpose is central to the customer experience.
- Look for ways to engage consumers across the customer experience.
- Easier for House of Brands companies; more difficult for Branded Houses.
- Depends on very close collaboration with the Corporate and Community relations team along with NGOs.
- Uses a diverse mix of communication channels.

**Externality-based model**

Focuses on influencing consumer behavior toward more sustainable consumption.

Predominant skill: Nudging

Brands using this model:

- Do not communicate a social purpose or benefit as part of the offering to customers.
- Are motivated by externalities of the product and their potential business opportunity.
- Tend to focus on environmental related benefits and require close and extensive work with R&D.
- The practice is similar to the experience of B2B businesses.
- Communication focuses on key external and internal stakeholders, not customers.

**Product-based model**

Focuses on the creation of new product or services aimed to grow within particular markets.

Predominant skill: Activation

Brands using this model:

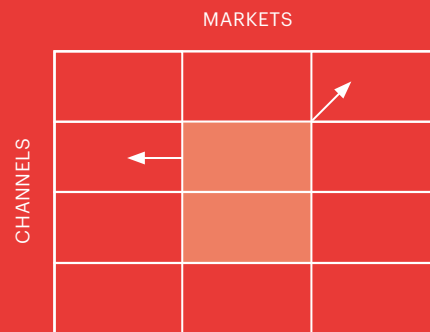
- Adopts mainstream product messages.
- Are motivated by a trend in consumer needs that relate directly to their products or services.
- The social purpose is often based on product characteristics related to their brand heritage and/or externality.
- The purpose is central to the product offering.
- Look for ways to engage consumers primarily at the point of sale.
- Easier for House of Brands companies; more difficult for Branded Houses.
- Depends on very close collaboration with the R&D teams.

### Define Your Business Logic

When facing internal resistance for social-purpose initiatives, managers sometimes focus on finding proof that those investments can help the business. However, the evidence could only persuade skeptics if it is internal to the firm and of similar conditions to the brand in discussion. Pioneers of purpose focus less on “proving a case” and more on clarifying the business logic of social purpose for their specific brand. That means answering the question of how will social purpose create value for the brand.

From a marketing strategy perspective, this question needs to be answered through the lens of the value it creates for customers/consumers. That means two different paths:

(1) Adjacency path - creating opportunities for the brand to enter into new markets, new channels, or appeal to new customer segments.

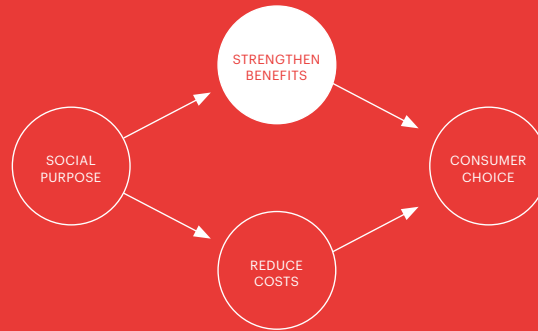


Example: Heineken’s launch of double zero is part of their commitment to support more responsible drinking. However, because many consumers consider switching to water after two drinks in order to sustain their sober condition before driving, it helps them grow market share beginning with the 3rd drink. Previously, Heineken did not play a role in the “third drink” market, but now they can steal share from water with the double zero offering.

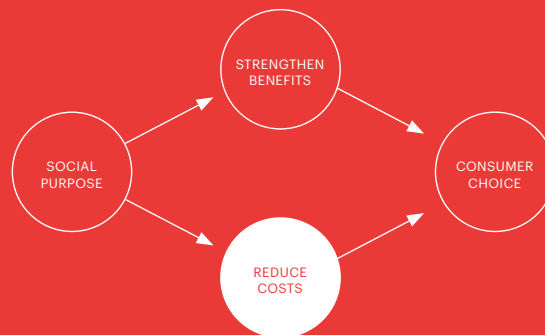
## (2) Attribute Path

In the attribute path managers use the social purpose to strengthen benefits or reduce costs.

Brand benefits are generally understood as being either functional or emotional in nature. For instance, in the case of bottled water, functional benefits include the water source, minerals, great taste or healthiness. Emotional benefits may be related to how the brand makes people feel or what it helps people say about themselves.



However, the choice of a bottled water is not only influenced by the benefits it offers. It is also influenced by its costs. The perceived costs of bottled water could be the impact of packaging waste on the environment or the effect of water extraction on water sources.



The value of the brand for consumers is the sum of all perceived benefits created minus the sum of all perceived costs, divided by price:

$$\text{value}_p = \frac{\sum \text{benefits} - \sum \text{costs}}{\text{price}}$$



# CERTIFIERIA

## Defining Brands with Purpose

What are the specific descriptors that can be used to assess if a brand is competing on social purpose?

Our research finds seven criteria:

1. Embedded in Value Proposition
2. Clear Business Logic
3. Defined KPIs
4. Specific Brand Job
5. Allocated Resources
6. Part of the Customer Experience
7. In for the Long Run

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# 1

## **Embedded in value proposition**

The brand has identified and integrated a societal benefit (either environment or community) into its value proposition and positioning statement.

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# 2

## Clear business logic

The reason for adopting a societal benefit goes beyond CSR or corporate reputation. The brand leaders have a clear description for the business logic of investing in the societal benefit and how it creates value for customers.

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# 3

## Defined KPIs

There are measurable goals associated with the societal benefit and their progress assessments are a part of the success criteria (KPIs) for evaluating brand performance.

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# 4

## **Specific brand job**

Brand has adopted one or more of the CSP jobs to support a societal need.

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# 5

## Allocated resources

The brand allocates and invests resources for the development of programs that are specifically designed to advance the goals related to the societal benefits.

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# 6

## **Part of the customer experience**

The societal benefit is acted upon and/or communicated in a way that is relevant and engaging to its customers/consumers.





### **In for the long run**

The expressed and realized commitment extends beyond one activation period and year.

## How to get involved



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**Ricardo Caceres**

Former Global Director of Marketing and Sustainability  
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Co-leader of The Practice of Purpose Project

If you have comments or questions, please visit our  
Linkedin Group at: [www.linkedin.com/groups/12077359](http://www.linkedin.com/groups/12077359)

If you want to share examples or practices from your experience  
Competing on Social Purpose, please visit our idea box at:  
<https://goo.gl/forms/P5yZYeaA87YiNq2h1>

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Is the premier global community of brand innovators who are shaping the future of commerce worldwide. Since 2006, our mission has been to inspire, engage and equip today's business and brand leaders to prosper for the near and long term by leading the way to a better future. Digitally published news articles and issues-focused conversation topics, internationally known conferences and regional events, a robust e-learning library and peer-to-peer membership groups all facilitate community learning and engagement.



The Ray C. Anderson Center for Sustainable Business is part of the Scheller College of Business at the Georgia Institute of Technology. The Center acts as a catalyst and connector, bringing together students, research faculty, companies, and entrepreneurs to create an environment where business-driven solutions to sustainability challenges can take shape and thrive. We create and share the knowledge that current and future leaders depend on to integrate sustainability into their organizations and beyond, and to drive innovation in business models, products, technologies, and governance. Since its founding, The Center has been particularly active in leading sustainability research and in developing sustainability coursework for students at all levels—undergraduates, MBAs, doctoral students, and executives.

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