

Leadership Branding™

Build the brand that builds leadership.™

*Reflections on the making
of truly trusted brands*

RE
TOOL LAB

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Preface

Many organizations seem desperate for attention. They wonder why they are not having a greater impact on people and markets, and worry it is becoming harder to reach key audiences and constituencies. It's often, at this point, that someone will say: "We need to rebrand."

The suggestion itself is a tacit admission the organization may be losing the thread of who they are and where they are going. Answering these simple questions can, in truth, be quite a vexing problem.

The branding process itself can be exasperating when relying primarily on standard tactics to formulate answers to these important questions. A new logo, values statement or advertising messages won't likely get the organization where it needs to be. But giving people a reason to support you, and giving them something to talk about, something worth listening to...that can be a game changer.

Branding success requires more than simply crafting a distinct market position and matching image, it requires going beyond expressing "Who are we?" Your value hinges on whether people trust what you say. The brand rooted in leading ideas – sustained by your intellectual leadership – will be the catalyst for success: the most effective way to be understood, to be authentic and credible. Build the brand that says leadership

Between 2017 and 2019 we wrote a series of articles about the reshaping of "the story:" how content has gone wrong, and how to change it. We wanted to know how organizations were telling their story, what was their strategy for communicating, and entrenching a leadership brand? The short essays in this special collection have been combined with some earlier articles published in our first two volumes of essays, *Contrabrand* and *The Alchemy of Content*, as well as later blogs.

Retool Lab

January 2021

The burden of proof and Leadership Branding.

Abstract

Communicating meaningful identity and mission is a chronic challenge when organizations rely on tactics that aren't up to the task. Organizations can't be understood if they aren't saying anything. The most effectively branded organizations never stop communicating what they know, why they stand out, why they are relevant. Leadership Branding organizations invite interaction and, by increasing their ability to keep people connected, redefine their financial prospects.

Nonprofits have always faced challenges, but the economic downturn of 2008 created a sense of unease, even panic, that modern nonprofit managers had never experienced. Fundraising organizations found it daunting to think the recession might leave everyone – from government and corporations, to foundations and philanthropists, even the general public – with less money for charitable giving.

Would organizations in the sector survive, let alone thrive? It was time for tough questions, not business-as-usual. To be better understood, better at motivating people to support their work, and better protected from cutbacks, organizations needed to be more effective at stewarding their brands. Nonprofit organizations have long-pursued branding – consciously or not – in the belief it will help them deal with myriad competitive pressures facing their organizations. Expectations about the transformative effect of a strong brand are high: possessing a strong brand inspires an organization to act confidently and manage itself from a position of strength. Managers, however, are often left disappointed when, despite the expense, their tactics appear to have minimal impact. Instead of instilling a positive impression, most organizations are realizing the brand association they have created is one that has them looking perpetually cap-in-hand.

The problem is not that the sector struggles with the concept of marketing, but that it defaults to the wrong tactics. Communicating meaningful identity and mission is a chronic challenge when organizations rely on tactics that aren't up to the task. These standard tactics (logos, advertising, mission statements, taglines, media relations, direct mail, dramatic new architecture), while desirable and – at times – necessary, will yield only limited results. They are more likely, in fact, to inhibit the spread of meaningful awareness.

Organizations must learn how to break through the barriers traditional branding has constructed. *Branding needs a new philosophy.*

Whether we're in prosperous economic times or not, the increasing fragmentation of the marketplace has made it all the more important for organizations to differentiate themselves. A brand is all the associations that come to mind when someone hears the organization's name. It is a concept, an idea, an impression; not a permanent or unchanging creation but something that will evolve over time. It represents the sum total of what an organization shows the world about itself: what it does, who it helps, why it's special. So where is the proof of the organization's distinctiveness if branding is limited to a cosmetic solution? We need to make room for a new dogma that better validates claims and enhances believability.

Building the right brand the right way requires uncoupling organizations from their reliance on superficial tactics so they can prove there is meaning and depth behind their marketing claims.

The articles in this collection were written and published as blogs or articles to help nonprofits and other for-profit organizations reflect on the sector's ineffective branding culture. Recognizing that they needed (and still need) to develop their capacity for thinking critically about the branding imperative, the intention was to produce a series of short, provocative articles describing more appropriate and effective practices. While some of these may now seem somewhat dated because of changing times, we believe the core messages of each article in this anthology remain timeless and important. These essays are meant to provoke, to challenge thinking, to inspire change. The essential message of this anthology is straightforward: *Organizations can't be understood if they aren't saying anything.*

Even though organizations have long known they can't meet their goals without an effective brand, it is time they learned they won't get that effective brand unless they communicate substantively. Only then will they overcome skepticism and build the trust that is essential to effective fundraising and management.

In our view, the most effectively-branded organizations are more than articulate: they never stop communicating what they know and why they stand out. Yet most organizations lie at the other end of the spectrum: Although their limited view of branding – which demands “look at me!” or “listen-up” – has given them temporary visibility, it isn't enough for them to become robust and self-reliant organizations. Organizations possessing a Leadership Brand, on the other hand, welcome audience engagement with the invitation, “Let's Talk.” By increasing their ability to engage minds and keep people captivated, Leadership Branding organizations redefine their financial prospects. Their brand is always “on,” always working because they have the arsenal of effective tools to keep audiences interested in their work, to nurture an emotional bond over time, and turn them into donors. Leadership Branding helps them stand out in a cluttered marketplace and proves that their organization is “worth the cost” to politicians, taxpayers, and funders who grudgingly surrender resources – in tight times or not.

When purpose no longer guides your strategy.



Abstract

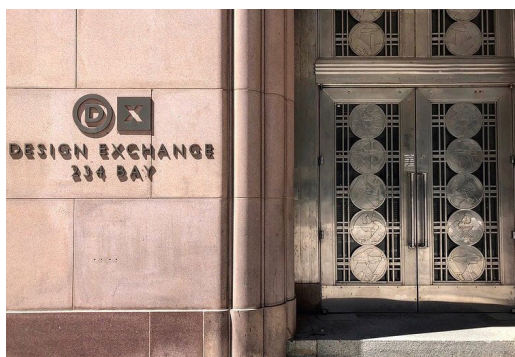
When does a museum fail? It happens. You need your organization to be relevant in this rapidly-changing world, but following the money leads many off-track and off-purpose. How well can you articulate your purpose – and put it into action? There are new rules to follow.

What happened at Toronto's Design Exchange? Canada's design museum was intended to be a vital place for supporting design culture when it opened in 1994. The United States and the United Kingdom have similar organizations (the Cooper-Hewitt and the Victoria & Albert respectively) that collect and preserve design objects; they also – perhaps more importantly – work to foster critical debate around how things are made. These are two museums with a purpose: spaces to disseminate culture, challenge thinking, and shape the conversation about innovative design. The DX, on the other hand, didn't emulate them: a mere twenty-five years later, it announced the entire DX collection would be “de-accessioned,” the legal process by which a museum's objects are permanently removed. This decision marked the end of the DX as a museum.

Brendan Cormier, a curator at the V&A, commented that people had long held out hope the DX would become, like the models on which it was based, an important part of Canada's culture. With its failure he lamented that everyday material culture was “at risk of being lost and forgotten simply because we neglected to invest in the cultural infrastructure to preserve these stories and objects.” (“Canada no longer has a design museum. That's a blueprint for failure.” *Globe and Mail*. 23 August 2019).

But who neglected? And why? The DX is a good case study of an organization unable to translate the well-defined purpose of a design museum into action. Cormier told his *Globe & Mail* readers that the “DX long-struggled to assert itself as a major museum of importance.” It's common for cultural organizations to wonder why they aren't having greater impact on people: they expect to play a major role as a focus of reflection and debate, and often rely on glamorous architecture to convey that something is being done on the inside. But the organization didn't know how to assert itself. It had a story it didn't bother telling: When it needed to communicate, to foster critical debate, to shape the conversation, and thereby inspire innovation, it didn't. Unable to articulate its messages, and unwilling to provide a sustained leadership effort, it couldn't realize its founding sense of purpose.

Nothing, Cormier says, was done to fulfill the organization's purpose beyond some one-off efforts: “a good exhibit here, a great lecture there.” In other words, its statement of purpose – if it had one at all – was little more than “a bunch of nice-sounding words on a wall,” which is exactly what organizations have to avoid. (Thomas Malnight, Ivy Buche, and Charles Dhanaraj. “Put Purpose at the Core of Your Strategy.” *Harvard Business Review*. September-October, 2019).



But that doesn't tell us where fault lies. Darren Walker, President of the Ford Foundation, wrote recently in *The New York Times* that "everything that moves an institution forward, or holds it back, can be traced to its board." ("Museums need to step into the future." *New York Times*, 26 July 2019). He went on to comment that museums can "enact bold forward-looking visions only when their boards support them in seeing museums as spaces to challenge, take creative risks, and not simply conserve." Cormier agrees: he tells us the DX could not perform competently as a museum because of "misguided management and a complacent board," and the result was its growth was doomed.

**It should be the museum's role to challenge
our thinking, to help us think as a society;
make us better-informed citizens.**

Correcting this won't be easy. In Walker's view, it is wealthy trustees and donors who decide what is valued at American museums; they who determine the museum's purpose, because they anchor fundraising. David Brooks would agree with Walker that museums are more interested in serving the interests of this narrow elite than the diverse range of people who actually make up modern America. He wrote recently in the *New York Times* about exclusivity being the pervasive ethos in our current society and how it "is spinning out of control. If the country doesn't radically expand its institutions and open access to its bounty, the U.S. will continue to rip apart." ("The Meritocracy Is Ripping America Apart." *New York Times*, 12 September 2019).

The solution, Walker says, is for institutions to "look beyond the gilded frames of this new Gilded Age and better reflect the public they serve." To do this, he advises museum boards to "stop seeing cultural diversity as subtracting from their annual revenue, but rather as adding strength: new stories that lead to new visitors, broader constituencies, and stronger communities.

And because this newly diverse museum will mirror what society actually looks like, it will better-serve democracy – and that’s its true purpose. It should be the museum’s role to challenge our thinking, to help us think as a society; make us better-informed citizens. A more active and leadership-focused museum/cultural organization is a place of ideas, and the goal of any organization should be to build its brand around shaping society’s conversations.

Getting a handle on the brand

We still haven’t addressed how we got to this point. The bottom line (pardon the pun) is that following the money has led these organizations off-track and off-purpose. A brand is a strategic signpost offering direction on how the organization should behave and what decisions it should make. But this situation described by Cormier, Walker, and Brooks indicates managers don’t have a handle on their brands, and they can’t articulate their respective institutional purposes. If the cultural organizations Walker wants to build are to stay on-purpose they have to understand three new rules.

1. Branding is about trust

Trust builds around organizations that explain why they are leaders and why they deserve the public’s support. This is not something we saw at the Toronto Design Exchange. When organizations don’t say why their work matters, an information vacuum is created and people’s attention is drawn to others who tell more compelling stories.

2. Speak authoritatively on issues of public interest

A culture of expectation rules the thinking at many cultural organizations, leaving them to wonder why they aren’t having a greater impact. They expect to play a major role as a focus of reflection and debate, but do little to achieve that goal. Providing the public with something meaningful and relevant to think (and talk) about, allows the organization to reach-out beyond its four walls to connect millions of people to its leading ideas. The alternative – either not reaching out, or doing so inconsistently – is to have a brand that can be quickly marginalized, as was the DX.

3. Community gathers around leading ideas

Putting your organization at the center of a vital public conversation allows you to become the focal point for discussion and shape the conversation. This is the type of leadership people expect of a leading organization, and why they will support it – and why the DX was not viewed in this way.

You need your organization to be relevant in this rapidly-changing world. If you want a more unified organization, with a more unified team that can make a broader and more positive impact on society, put purpose at the core of your strategy. Make sense of your past and then, with those insights, decide where you go. Just don't make it a one-off effort.

Explain yourself. Why your work matters.

Abstract

When it isn't clear what you do without a lot of explanation, your brand has a problem that can only be solved by rethinking your leadership story. Chances are you haven't been speaking sufficiently clearly, vividly, and publicly about **why your work matters**. Delivering good content that invites reflection and stimulates learning drives engagement and causes people to support you. And if you don't – if your leadership and credibility goes unrecognized – chances are your competitors (or antagonists) will fill the gap.

A client of ours wanted his management team to answer this question: “What will cause people to support us?” That’s an ever-green question for fundraising organizations, and the pursuit of an answer has launched a thousand rebranding exercises. But the client knew it wasn’t enough to figure out for themselves “who we are”. The real problem, he told them, was that “its not at all clear exactly what we do without a lot of explanation.” What that meant was that in order to improve their prospects, they were going to have to rethink how they demonstrate their leadership to a broader audience.

First they knew they had to accept a few things:

1. People don’t even know you.

Call it the culture of expectation: most fundraising organizations believe on some level that audiences intuitively know who they are and will support their work. They don’t because the conventional branding tactics you tend to use (the taglines, designs, and advertising) aren’t adequately explaining what people really need to know about your organization. You have a voice: engage people with stories about your expertise; tell them why you have an impact. Explain yourself.

2. Your brand is not just about you.

Your brand is mostly about “them,” the people to whom you’re trying to explain yourself. Your goal is to get people to identify with you, but actually it’s you who has to demonstrate that you identify with them; that your work focuses on problems they care about. Community gathers around ideas: when you put your organization at the center of a vital public conversation – giving them information they care about and a forum to learn and discuss – you are addressing their needs. In so doing you will be recognized (and supported) for identifying with your audience.

3. Leadership is a catalyst.

Your success depends on a compelling message that gives people a reason to support your work. Do they see you as a leader? People want to associate with the organizations that give them leading ideas – and they'll support the organizations that provide them with something meaningful, relevant, and important to think about. Community-gathers and trust-builds around organizations that explain why they are leaders. So don't just have a tagline that says you are a leading voice: develop content that proves your organization actually is the place to interact with leading ideas.

Elite organizations know superficial content robs organizations and their brands of what makes them interesting. People crave deep, rich, thought-provoking content that invites reflection and stimulates learning; content that drives engagement. Delivering good content will cause people to support you. In short, if you want to identify with your audiences' needs, explain yourself by developing worthwhile content.

And if you don't, your competitors – or your antagonists – will. Most fundraising organizations haven't been speaking sufficiently clearly, vividly, and publicly to a popular audience about why their work matters. When their leadership goes unrecognized, their credibility can be questioned. These organizations need to remember what Aaron Sorkin once wrote: "People want leadership and in the absence of genuine leadership they'll listen to anyone who steps up to the microphone."

Digital technology broadens our ability to tell stories; there are no more barriers, no more excuses holding organizations back from offering sustained engagement with leading ideas. Give people something to talk about and you won't be up at night worried about "what will cause people to support us?" And you won't have to keep explaining what you do.

Shallow content destroys brand value.

Abstract

To produce excellence you need time; to think, to create, to produce. *Sports Illustrated* stood out on the basis of excellence. For 65 years its millions of fans savoured its research, thoughtfulness, and good writing. But now, the media barons running it believe their readers have short attention spans. They are replacing the magazine with a new product where they can cut corners on their traditional excellence. If the magazine was a fundamental lesson in successful branding, its dismemberment may prove to be a how-to-guide for destroying a brand.

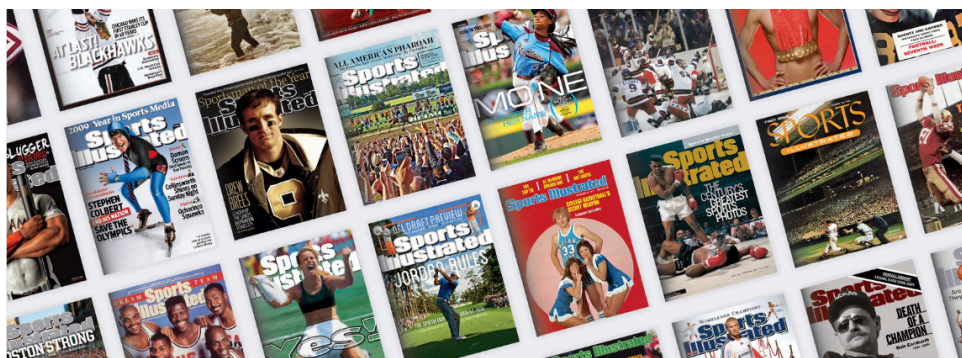
North American sports fans won't ever accuse Joe Posnanski of hyperbole if they hear him claim *Sports Illustrated* is "the greatest magazine in American history," but for many decades it has been just that. Millions of people keenly anticipated its weekly delivery, then read it cover-to-cover; savored it. The magazine nurtured the interests of generations of sports fans, all the while helping the myriad sports it covered to grow influential. But the fabled magazine is being discontinued. It had already suffered the indignity of being downgraded from a weekly to bi-monthly when, on October 3, half the magazine's newsroom – the writers, editors, and photographers who had crafted the magazine's seminal brand since its inception in 1954 – were let go to make way for a new-look Internet product.

It shouldn't come as a surprise: more and more of us receive our news, information, and stories in ways that do not include print, and there are all sorts of reasons why we should embrace digital delivery. It's doubtful, however, that the new online product will be an improvement: dismissing the writers and editors means they've cut out the magazine's heart; the new owners are more or less declaring quality no longer matters. Chad Finn laments "something once transcendent" is being replaced by something that is "the exact opposite of *Sports Illustrated's* tradition of excellence" ("*Sports Illustrated* deserved better, as did its readers," *Boston Globe*, October 5, 2019).

What made *SI* a success was research, thoughtfulness, and good writing. All that mattered, says long-time *SI* columnist Rick Reilly, was "a killer piece": to get it you could go wherever you needed, "as long as you wrote the best story in the country about that subject" ("The Point After," in Peter King's "Football Morning in America, NBC Sports). To produce excellence, writers got leeway: time to think; time to produce; and, time to create. And their writing was supported: the best photographers, the best editors, and the best fact checkers. *SI* stood out on the basis of excellence.

But the world, and people's expectations, changed: along came USA Today; CNN and ESPN developed the 24-hour news cycle; and, now we have the Internet and demands for instant delivery. What happened, Reilly says, is that "people forgot how to savor." This is true, but organizations have gotten away with giving readers less.

Finn is not merely concerned about the *Sports Illustrated* brand being defiled, what really bothers him is that what is replacing it is a model that is "already proven to fail."



In the world of Internet sports journalism, writers and editors take a back seat to influencers and content aggregators who sit in a room, watch sports on TV, then scribble 300 words about what they just saw. The end-product – new posts, videos, tweets, blogs, and podcasts – is raw and immediate; top of mind stuff. And doing all these things at once is too distracting to allow for excellent journalism. What sports fan, then, will want to sit by their inbox waiting breathlessly for “that” to arrive?

If the first 65 years of *Sports Illustrated* was a fundamental lesson in successful branding, its dismemberment is a how-to guide for destroying brand value.

This is, however, what the media barons now running *SI* want; they don't seem concerned about shallow content destroying the brand. The new CEO may think he's catering to people's supposedly short attention spans, and his perception that people demand pithy content, but I'm not sure they understand their audience. I'm reminded of William Goldman's comment in (the screenplay of) *All the President's Men*: “Forget the myths the media has created. The truth is, these are not very bright guys, and things got out of hand.” If the prevailing wisdom is that the Internet allows organizations to cut corners on quality content, then perhaps things are out of hand. These new managers forget: details matter; facts matter; and, excellence is important. Sixty-five years of *Sports Illustrated* history shows us readers do like to think, and they are attracted to depth and insight.

There are some stalwarts: we still have *The New Yorker*, *The Atlantic*, and *National Geographic*; all continue standing-out because they remain willing to provide fresh, well-researched, and substantive stories.

National Geographic exists to help people understand our world. After 130 years, the magazine, and the Society that publishes it, remains pathologically open-minded about how its mission – “the increase and diffusion of geographic knowledge” – could be achieved. Sponsoring scientific research and expeditions, then telling those stories in the magazine, is how it became “the authority” about science and exploration. It never followed the practices of other magazines: *National Geographic* editors didn’t worry about competition from *Look* or *Life*, magazines that were read and thrown away (and are now defunct). *National Geographic* stories, on the other hand, were valued; it was read and saved (as many did with their copies of *Sports Illustrated*). This sustained interest built a community and provided real proof the magazine was doing something meaningful.

“There’s a great demand for media with a purpose and people look to National Geographic to meet that demand.”

Gary Knelly, Chairman, National Geographic Partners

Editors knew that if the magazine was to stay ahead it must demonstrate its vibrancy and relevancy: they pioneered the use of colour photographs, published books, produced documentary films, and specialty magazines – and, yes, it has a huge Internet presence. But those changes have never undermined its quality, nor compromised on substance. Editors know their avid readers want authentic geographic material; they crave stories that captivate and challenge their thinking, and rank the longest articles as their favorites. By continuing to engage minds with interesting and detailed stories, *National Geographic* has left its mark.

Good writing helps lure-in audiences and seduces with transformative, differentiating, and adventurous narratives, yet organizations neglect the potential of language to creatively demonstrate their unique personalities. Shallow content on the Internet is indeed a bleak approach. The new *SI* may soon discover that content – not the delivery vehicle – is King.

All is not lost: we still have a few great magazines to remind us leading ideas still attract. Truly successful organizations use it – deep content – to drive engagement and build audiences because they know few things captivate and get people talking like a good story. If we can go back to vinyl records, maybe we can re-embrace excellent writing.

When *bums* *in seats* aren't enough.

Abstract

It's a truism that when only so many people can hear your story in person, you leave a lot of potential supporters on the table by not reaching out beyond your four walls with engaging content. Doing so ensures your brand is always on, and always appears relevant and dynamic.

If you ever get to New York City's Lower East side, make sure you visit the Tenement Museum. It's small and easy to miss because it blends into the streetscape, but well worth the search. A poignant monument to the immigrant experience in New York, this century-old rooming house is like stepping back in time. Its fascinating story reaches into the heart of the American identity; my daughter, then age 12, was mesmerized. The problem is only so many visitors can hear its story about how newcomers settled into urban American life in the late nineteenth and early twentieth centuries: the 250,000 people who now visit annually for guided tours are the upper limit of this small building's physical capacity.

Kevin Jennings, the Tenement Museum's incoming president, wants to offer a new way for people to interact with this slice of their history. He recognizes that telling the tenement's stories on a digital platform, including the use of virtual reality, can help them reach out to the "millions and millions of people we're not touching," some of whom may never cross its threshold but will still want to learn about the story and support the organization's work.

The same is true for most fundraising organizations: they leave a lot of potential supporters on the table by not reaching out beyond their four walls with engaging content. The Vancouver Aquarium – recently rebranded as OceanWise – is one of those. It hosts 1.2 million visitors annually, and the aquarium it manages in Valencia, Spain – Europe's largest – also attracts the same number annually. Both could accommodate more visitors in situ but OceanWise wants to shed its association as a local tourist attraction and build awareness about their new brand as a global oceanographic conservation and research leader. The plan is to get its stories out to 100 million people by 2025; then 1 billion people by 2025. It can only reach those numbers if it tells an engaging story digitally.

For inspiration, any organization with a story to tell could look to Harvard Business School (HBS): there's no secret to how it became successful. It recognized a long time ago that there was a broad audience wanting access to its expertise, but only so many classroom seats it could fill. It launched the *Harvard Business Review* in 1922 and publishing quickly became an extension of its educational mission. The HBS label is on many thousands of products that offer wide public and professional access to its knowledge through magazines, books, case study publishing, videos, interactive web sites, and newsletters, each one reinforcing the school's reputation for high intellectual standards.

True, these products generate a lot of money (by 2012 publishing was generating about \$165 million in annual revenue for the school) but its publishing ventures are motivated by other factors. Offering multiple points of contact to leading ideas ensures the HBS brand is always relevant and dynamic. Publishing, in all its various forms – paper or digital – is the primary tool the university leverages to position itself as the leader in the marketplace of ideas. Its mission is to take the most important ideas on the most important issues facing leaders and communicate them.

The school has nurtured this identity so successfully, and backs-up its claims to intellectual leadership so effectively, that HBS is forever top of mind as business's thought leader. And from there really good things happen.

Doing these “little” things well to establish quality perceptions means the Harvard Business School brand not only helps it attract the best and brightest students and faculty, but also deep-pocketed donors. “It comes down to money,” acknowledges the former president of the University of Ottawa, Alan Rock, who claims the biggest challenge facing the sector is “to achieve levels of funding that will enable us to succeed in our mission.”

Publishing, in all its various forms – paper or digital – is the primary tool the university leverages to position itself as the leader in the marketplace of ideas.

Fundraising organizations must be able to reach beyond their walls to convince donors the organization has a vision indicating how it will become sustainable. The prevailing assumption – that “charming and professional fundraisers” provide sufficient returns for the institution – is wrong, writes Michael Kaiser in *The Art of the Turnaround*. Instead, he says, they should be spending “the time or effort in marketing the entire institutional image required to get people excited about supporting” the organization.

In other words, effective fundraising goes hand-in-hand with an effective leadership story.

When “only so many” people can visit, The Tenement Museum has to figure out how to reach bigger audiences. That now means telling stories to engage the Millennial generation, the largest generation since the baby boomers. Are our assumptions about the content they want – pithy YouTube videos – correct? I hope not. The media is endlessly fascinated with the stereotype of a creative, hyper connected, lazy, and narcissistic generation with a shrinking attention span.

It's time to let go of these tired myths that may never have been true in the first place. It just so happens, according to *Forbes*, this “lazy” generation reads more than previous generations at the same age. They aren't giving up on traditional printed books, but are also consuming vast quantities of electronic text, everything from blogs to online magazine and newspaper articles.

Reaching out to Millennials

As this generation matures, we will not be able to overstate the importance of original and compelling stories. In *The Attention Economy*, Thomas Davenport and John Beck wrote that “people with something to say, or a unique and creative way of saying it, are your organization's best hope of getting attention.” This is a truism regardless of generation or the impact of technology.

Millennials are an interesting, and interested, but demanding generation: fundraising organizations need to engage their attention and nurture those interests with substance and leading ideas. They aren't afraid of having their thinking challenged. And to attract millennials, crowdfunding may be the perfect tool for organizations to embrace. Ideally it's aimed at people who want to build their own social give-back program. It attracts donors who do not necessarily want to give blindly to a “fund” but they will donate to projects they believe in – as if they were saying “this looks like something I can get behind and tell my friends to invest in as well.”

Crowdfunding enables fundraising organizations to build brand awareness around, and fund, certain narrow activities, and it leaves donors knowing precisely where their money is going and how it is being used.

YouTube is still with us, but “pithy” is so five minutes ago. Substantive content is king and this youthful and idealistic generation wants to support the people who bring them leading ideas about the issues that concern them. Embrace Millennials and expose them to your insights. It will turn them into supporters of your work.

How the Mayo Clinic got to now.

Abstract

Chances are, you think your brand is about marketing, not strategy. If you worry about the future and how to get there, one of the most powerful management tools at your disposal is understanding your past: it explains identity, demythologizes nostalgia, and reveals unifying themes that heal rifts, unite employees, and pass on values. How you tell the lessons of your unfolding leadership story profoundly impacts whether your identity, culture, and expertise is successfully understood and appreciated...and how successfully you reach the future.

Organizations perceive themselves to be in a constant race for attention, which means they are always reexamining their brand's positioning and messaging. They know they have to be well-differentiated and authentic. They worry about building for the future and how to get there. Very few of them will turn to the past to find answers.

“You’ve got to know where you came from to know what to do next.”

– Abraham Lincoln, attributed by Doris Kearns Goodwin

“Who are we?” is a surprisingly vexing question. In a crisis, leaders will ask “how we got to now” but few investigate how the organization evolved and adapted in the past. Instead of divining the essential truths of the organization that have become an indelible part of its DNA and leveraging those insights, most managers are oriented to looking ahead. They are dismissive of history, seeing it only as something quaint and charming, an amusing collection of memories without any compelling strategic use. For a leader planning to take an organization into the future, one of the most powerful management tools available may be a sophisticated understanding of its past. It is, quite simply, crucial to branding and strategic thinking.

“Where we’ve been, Where we are, Where we’re going”

American Experience (PBS) tagline

The past reveals the roots of identity and demythologizes nostalgia so people can more clearly understand why decisions were made at the time they were, and why. It reveals unifying themes and helps pass on the values of founders so the torch can be passed to the next generation of leaders.

“We drive into the future using only our rear-view mirror.”

Marshall McLuhan

Organizations using the lens of history to examine their culture find that leveraging what they discover has a profound impact on how successfully their work is understood and appreciated. McKinsey & Company, for example, learned as it evolved from being a small and informal partnership to a global consulting network, that it needed to pay attention to the values that had shaped the Firm over time for a new generation of consultants. These insights aren't luxuries for marketing, they help leaders with two vital jobs: revealing the direction of future strategy, and uniting employees with a common, inspiring and authentic identity story.

Once we get beyond asking "What is our story?" we also have to know how to tell it. How do you convey culture when books and magazines seem as useful and convenient as a rotary-dial phone, and people get lost in the Internet's wilderness of voices?

That brings me back to the historian whose role is not to live in the past but, rather, to understand, contextualize, and leverage experience so organizations see the future. That backward glance letting people see their unfolding story as a process is not just how to cope with change, but also how to reach the future.



The Mayo Clinic

In the 1970s, Avis proudly told the world it was the number-two car rental agency, and promised to try harder for customers. The assumption was that Hertz, in first place, didn't (or wouldn't) work quite so hard to make their clients happy. It was a brilliant marketing slogan: being number one lulls some organizations to sleep; they take their status for granted and don't try harder.

If there's truth behind Avis' logic, why would Mayo Clinic, what some call "The Greatest Medical Centre in the World" – an organization of 64,000 employees whose almost-mythical reputation attracts patients come from all over the world – feel it necessary to have Ken Burns tell its story in a documentary film?

A documentary is a strategic exercise in understanding and communicating the values of an organization, and Burns, by identifying the seeds of the Mayo Clinic's culture, provides essential knowledge for directing its future. In telling this story, Mayo Clinic is applying a fundamental principle of leadership branding: capturing the unique knowledge that makes it a leader and using this particularly powerful medium to convey its messages.

How the Clinic appears today – its website uses bold, declarative statements to position its attributes: *“More experience,” “The right answers,” “Seamless care,”* and *“Unparalleled expertise”* – isn't the way things started. The Mayo Clinic began humbly, as an agreement between Mother Alfred, a nun with the Sisters of St Francis in Rochester, Minnesota, and Dr. William Worrell Mayo, a local physician. After a tornado devastated Rochester in 1883, both were convinced better health care was necessary for their community, and Dr Mayo agreed to serve as director of a hospital to be built by the Sisters.

By the time their new hospital was built, Mayo's two boys, Will and Charlie, were themselves physicians. He had raised his sons in medicine – “like farm boys on a farm” – and taught them to believe that if you have certain skills, abilities, resources, you hold them in trust to give back to other people. The boys grew up seeing their father reduce his fees for those who couldn't afford treatment and were equally inspired by the devotion the Franciscan sisters had for the people of Rochester.

Will and Charlie came to see their interest was in the service of humanity, and this film underscores what continues to lie at the heart of the Mayo Clinic's culture: the urge to continually improve so it can help more people. Just as the Mayo brothers were challenged to improve so they would leave behind something better than what they inherited from their father and Sister Alfred, the Mayo's current generation of leaders face the same challenge.

Burns reminds the present-day Mayo Clinic that over the span of 130 years it remains focused on its commitment to taking care of each other, the role of money and profit in medicine, and the very nature of healing itself. And helping perpetuate the culture at Mayo Clinic is an air of curiosity and imagination looking for new methods, new science, new technique that extends back all the way to the beginning of its history.



At its heart, however, the Mayo Clinic mission has always been focusing on the patient. The Clinic doesn't exist to treat illness, they treat patients, and there will never be a decision made about patient care that benefits the physician. And to better treat the patient the Mayo Clinic remains a culture that thrives on collaboration. The hiring of new specialists to help Will and Charlie in the 1890s "signaled the start of a collaborative approach to medicine because Will Mayo believed "individualism in medicine can no longer exist." Believing no one person can know everything they ensured no Mayo doctor would be alone in his or her effort to find an answer to a patient's problem. What this means in current terms is that behind every physician at Mayo Clinic there are 2,400 other physicians who can help take care of a problem the patient has. Then, as now, physicians were on salary and did not profit from the proceeds of the practice. The concept of establishing this group practice for the good of a single patient may be the biggest contribution of the Mayo brothers to American medicine.

Are you telling your story like the Mayo Clinic?

The Burns documentary ensures insiders and outsiders alike know what makes this place tick –and there are obvious lessons for Canadian institutions which might be wondering if they tell their own stories effectively. Canada's version of the Mayo Clinic could be Toronto's University Health Network which is, at the moment, focused itself on how to convey organizational culture. It is running an internal campaign asking employees " Do you live UHN's values?"

Crudely taping a photocopied poster above a garbage can next to the elevator, and directing people to read details buried on the corporate intranet doesn't seem calculated to be either inspiring nor effective. What it does do, however, is demonstrate little commitment beyond lip service on the part of the institution toward extending awareness about the values and identity of the organization.

If it wants people to take the exercise seriously so that they actually come to internalize and appreciate the UHN identity, it has to broadcast a compelling and attractive story. It should be explaining its own culture and showing employees (and the rest of us) “how we got to now” by following the Ken Burns and the Mayo Clinic model.



Historical thinking isn't about living in the past but, rather, about challenging thinking – understanding, contextualizing, and leveraging experience so organizations see the future. People have an appetite for deeper accounts of history, science, and the environment that tell us how things got to be as we see them today, and institutions can harness this by thinking more expansively about their brand story. It's hard for outsiders or insiders alike to connect with organizations that don't effectively tell their story. Engaging content should be at the core of outreach but more often than not organizational content isn't adequately put to uses to create a broad mission-supporting brand. No one can hear your story if you don't tell it; don't bury it on an Intranet. A backward glance lets people see their unfolding story as a process; it's not just how to cope with change, but how organizations can reach the future.

Leadership Branding, Patagonia-style.

Abstract

In the rush to rebrand there are companies that choose to pass-over questions like “Are our values important?” because they’re not sure anyone cares. But a company like Patagonia has made answering those questions the focal point of everything they do. It has a very important contract with its customers who expect Patagonia’s anti-consumerist message to protect them and the environment in equal measure. Do you really need to buy their product? Will you repair it before throwing it out? Who challenges customers by asking questions like that? A leader who is very sure of its brand.



You're rebranding: you want to establish your company as well differentiated and authentic, and to say you're a leader. So you start asking questions like "Who are we?" "What are our values? Are they important?" "What do we stand for?" "What do we believe in?" Does anyone care about our mission? Crucial questions – and if you want some answers you can learn a lot from Patagonia.

It's a nice, quality product – so well-made, in fact, Patagonia is considered the Gucci of outdoor apparel. Perhaps that isn't the brand identity Yvon Chouinard intended in 1973: building the best products may be one part of the mission he gave his fledgling company, but if Chouinard's creation has, amidst withering competition, grown into one of the world's most influential apparel brands – with 1,350 employees and \$540 million in annual revenue – it's because its operations are guided by a clearly-articulated higher purpose.

Chouinard launched Patagonia to address the damage he and other climbers were doing to the rock faces they were climbing; environmental problems remains central to the Patagonia mission. Forty-five years later, its environmental leadership has taken Patagonia to a unique place among companies and proved you can do well by doing good.

The company's mission has evolved a very distinctive contract with customers. From the company's perspective, being a responsible leader means knowing how to reduce its environmental impact. For example, knowing it takes 185 gallons of water to grow enough cotton to make a t-shirt, and knowing that where the water comes from makes a difference: a dam displaces people and destroys rivers. Chouinard wants the raw materials for Patagonia products to come from where it rains so the impact is minimal. On the other hand, Chouinard wants customers to think twice before buying anything: do you really need it? He wants people to feel like that jacket is something they're going to have the rest of their lives; if it does wear out, he wants people to repair – not replace – it. "We want to close that loop between consuming and discarding," so Patagonia produces a series of videos showing customers how to fix things themselves – or send it back to the company. Its first initiative repaired more than 30,000 items in 18 months.

That spawned a project dubbed Worn Wear, which began accepting repaired Patagonia merchandise for sale in stores. The lesson-learned is that the more Patagonia campaigns on an anti-consumerist message, the more it invests in its values, the better the company performs. When Chouinard told people not to buy Patagonia jackets, more people bought jackets. When employees proposed that the company give away all of its 2016 Black Friday sales to grassroots environmental organizations, the company raised \$10 million and signed up 24,000 new customers on that one day. Says Chouinard, “every time I have made a decision that is best for the planet, I have made money.”

Living up to a meaningful mission statement pays off. It turns out that the more honest and open Patagonia is the more its customers want to engage with its efforts to be a better global citizen. Its customers want to do the right thing and make their own environmental commitment, they just need a leader to help show them the way. They want to associate with and support brands that do the right thing. Patagonia does that.



Not surprisingly, Chouinard knows he has to pass on his values to employees if they are to carry the torch and extend Patagonia's leadership. Mission statement and values give people insights so they can follow the founder's vision, and make the right strategic decisions. He used to run five-day courses with 15 employees at a time, and would talk about why Patagonia does things the way it does, but it got too time-consuming as the company grew.

So he authored a book for employees entitled *Let My People Go Surfing*. It's about the history of the company and its philosophy; people get a copy when they start working at Patagonia.



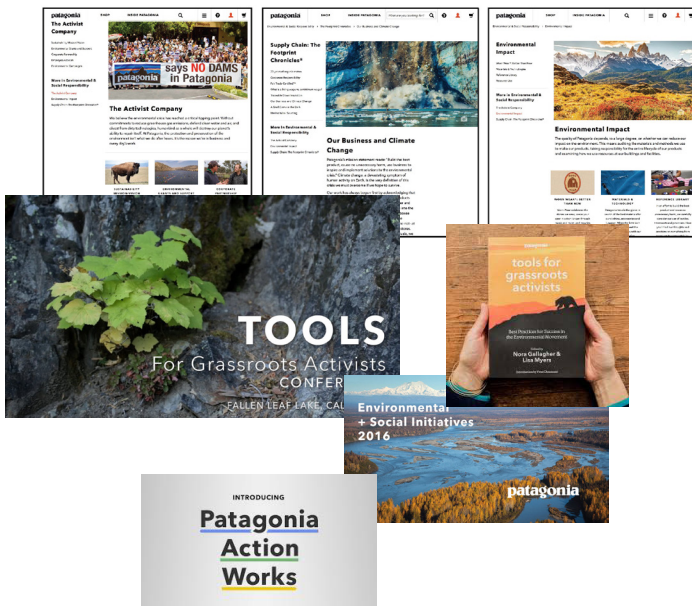
And those values do get passed along. Rose Marcario, Patagonia's current CEO, has not been shy in using the company's bully pulpit to protest recent government decisions. She worries that Trump is disrupting the planet's future by pledging to bring back coal, dismantle public land protections, and unwind efforts to combat climate change. This represents everything Patagonia believes in. Marcario feels all the company stands for is "on the line" and says this is a moment to embrace Patagonia's core DNA. Rather than be silent and compliant, the company has upped its commitment to environmental activism and resolved to use its own capital and influence to achieve what government won't. She wants to "galvanize" the Patagonia community around these issues, she says, reminding her people that they must "continue to [use] their voice" and "deepen our resolve to protect what we love."

This is the Patagonia mission at work. How many companies get personally involved to this extent? Very few. To Patagonia it is all about having the willingness to live its brand. Marcario has little patience for leaders who act out of self-interest and she pushes those around her to work on a "30-year framework," to understand the long-range consequences of business decisions, rather than merely what will move the needle next month or next year.

This concept of inspiring others to act differently is an essential part of Patagonia’s mission. “At the end of the day,” Marcario says, “it’s the customers who will change the world” and she wants customers to buy into causes at the same time they’re buying products.

Most companies have mission and values statements – Patagonia lives its mission statement everyday and tells its story to bring others into its community. This is leadership branding, Patagonia style.

What is your company’s greater purpose? How do you inspire and empower employees to live your company’s mission and values? What can you do today to have a leadership brand? The answers to these questions are neither as difficult nor as elusive as you might think. As Patagonia’s Marcario suggests, the answers start with willingness. Leadership Branding, Patagonia-style.



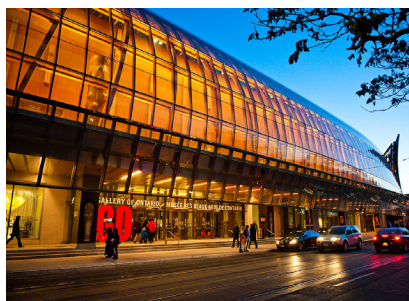
Brands must think like media organizations.

Abstract

In this age of distraction, appearing relevant has never been so hard. Museums can keep trying to get more people in the door, but can they become influencers? Patagonia has recently changed how it defines itself: achieving this new mission requires it to be “in the film business.” Can you find and promote the real meaning in what you do? Think like a media organization and tell stories with a purpose. That will not only get more people in the door, shaping the conversation will make you an indispensable organization.

We live in a distracted society: busy, cluttered lives weighed-down by too many choices. Caught in the middle are museums. They are interesting and respected, but are seen to be non-essential organizations; not the influencers they would like to be. In recent years museums have been challenged with engaging and retaining the attention of people who can easily be distracted with a smartphone. Making choices so they appear relevant was never so difficult. How do you transform perceptions about what you do?

Over the past year, the Art Gallery of Ontario has experimented with a pilot project intended to “boldly declare that art is for everyone.” Believing that time-stressed people want to be able to pop-in-and-out of exhibitions, they have decided to make visits easy and affordable: young people under-25 can visit for free; the rest of us can get a full year of unlimited access for only \$35. Opening the AGO’s doors wide appears to be working: Stephan Jost, the Gallery’s CEO, told CBC Radio’s Metro Morning program that, as of November 26, 2019, more than 100,000 people have signed-up.



The AGO may hold *half* the answer

Clearly it’s a great way of getting more people in the door; a great start. The problem is that it perpetuates the idea that success should be measured according to the number of visitors walking through the turnstiles. It’s the usual way of doing things, and their traditional business model handcuffs

museum imaginations about what else might be done. Transformation won’t happen as long as the sector persists in believing it doesn’t need to engage audiences beyond a museum’s four walls.

Museums grouse about being undervalued. They could be important – even transcendent – institutions if there was more emphasis and innovation about telling stories to a wider audience. But if they remain satisfied to be local venues, they will never alter the public view of museums as short-term culture-based commodities.

What will the AGO do with its new bounty? 70% of these new members are in the under-25 age category (free) so we aren’t taking about a spike in revenue. But that doesn’t matter; this maneuver isn’t about money. Typically, people visit a museum then leave, silently and anonymously. The payoff from having 550 people joining every day is that they are giving the AGO their contact information. As Jost says,

“with the annual pass we can communicate” and new visitors can’t remain anonymous. The AGO now has well over 100,000 new email addresses and mobile phone numbers enabling them to stay connected to their new friends between visits, and to develop communities of interest around their work.

Hopefully this isn’t just about advertising and the AGO will begin producing engaging new content to circulate to its new members. They could give people something to talk about in-between-visits that shape the conversation about art and, in the process, extend their brand. These are, after all, places of ideas. There’s no question about their relevance: museums exist to give people the knowledge of how our world developed and empower them to look forward into the unknown with a sense of self-determination so, together, we can build a better world; a worthy mission.

From a place to visit, to a place in the mind.

Can they be influencers? Transform your organization first by changing how it thinks about itself – your purpose – then tell the stories that support that purpose. The chutzpah museums need involves challenging audience thinking: To think like a media organization, to tell stories with a purpose, and to make themselves the focal point for discussion.

With 1,350 employees and \$540 million in annual revenue, “Patagonia” is known as one of the world’s most successful outdoor apparel brands. Yet its founder and chairman, Yvon Chouinard, doesn’t describe his company as a clothing manufacturer. For many years he promised Patagonia would *“Build the best product, cause no unnecessary harm, use business to inspire and implement solutions to the environmental crisis.”* Over time he felt that wasn’t clear enough so he changed its mission statement to better-reflect the higher purpose guiding its work. To express his essential belief in environmental activism, the mission statement now says simply, *“Patagonia is in business to save our home planet.”* It is a direct, clear, urgent, and blunt statement signaling to everyone inside the company and out that the world faces a climate crisis, and that reality is fundamental to every aspect of the company and every job at Patagonia.



To engage people in its mission, Patagonia has been investing in storytelling; not your run-of-the-mill web posts, mind you. Chouinard has decided to tell people about Patagonia’s sense of higher purpose through a series of short films and, most recently, through its documentary *Artifishal*. The films express

what is important to the company: says Chouinard, *“we recognize that people make decisions based on emotion, and the best way to elicit emotion is through film. It’s not through books or catalogues or speeches. So we’re in the film business. We’re working on 10 films at a time these days. Some of them don’t make a cent. But that’s not the purpose.”*

“We’re in the film business.” An interesting statement from a profit-driven clothing manufacturer. Yet this is a mission-driven organization where transforming how people think is its real purpose. And its documentary films are helping people find meaning. Some of those people may become customers, but that will only further Patagonia’s advocacy.

What is your real purpose as museums, and how might you best fulfill it? Organizations have to find new ways to breakthrough and inject greater meaning into what they do. Becoming influencers, becoming essential, isn’t an unrealistic goal. Patagonia is turning unwritten rules on their head to transform how people think about the environment. Consider the transformative effect of your leadership. Don’t keep it a secret. Communicate with purpose.

Facilitating smart brands.

Protecting the funders who enable the national identity.

Abstract

Capturing the Canadian identity has always been vexing, and Americans now worry they've lost the basic agreement about their own leadership story. How we refresh and retell our respective stories comes down to government funding bodies that are – in all but name – branding agencies that facilitate the building of national identity. Can we protect their work and its immeasurable impact?

Good or bad, every organization has a brand. A brand is a story, and storytelling has become a trendy way for companies to convey fresh and authentic messages about “who we are.” For the same reason, countries tell their national story to unite citizens with a sense of meaning in a common endeavor, one that indicates a future course. How we interpret the story evolves—it gets reaffirmed and retold for each new generation—but for the most part, people agree on “who we are.”

Until now. *New York Times* columnist David Brooks worries the current American generation has lost its story, lost the basic agreement about where they’ve been, where they are, where they’re going. Brooks concludes America needs “somebody who can tell us what our goal is, and offer an idea vision of what the country and the world should be.”

Ordinarily, the United States has organizations that facilitate the telling of stories that keep the brand fresh with new interpretations. The problem is these aren’t ordinary times. In his first budget, Donald Trump canceled the mandates of the National Endowment for the Humanities (NEH) and the National Endowment for the Arts (NEA). Both were established in 1965 by a president who recognized arts and culture as an essential capability, evidence of America’s “advanced civilization” status. And for fifty-two years, the myriad stories supported by NEH and NEA grants served to help Americans understand “who we are” and signal the brand’s direction.

Shuttering the endowments signals the national brand is going in a less appealing direction.

Whether or not this current president is a philistine intent on beating plowshares into swords, these cuts undermine how future American generations refresh and retell their story.

Drew Gilpin Faust, president of Harvard University, has rushed to defend the NEH. She wants people to know this is a profoundly important organization. Whether through small projects that put the humanities into parts of the country under-served by museums or lectures, or through national television broadcasts exposing tens of millions of people to pivotal moments in their nation’s history, the NEH helps Americans “understand how we came to be the nation, people and

world we are.” According to Faust, the NEH “challenges us to reflect on our identities as citizens [and] to ask profound questions about origins, legacies, and meaning, to contemplate where we are going as individuals and as a society and why.”

By facilitating the American story, the NEH is a branding agency in all but name—and at a relatively modest expense. Each year, these two endowments spend about \$300 million supporting artists, musicians, writers and scholars—by no means a trivial sum, but still a fraction of the government’s annual \$1.1 trillion discretionary spending budget. Name another program that, as Faust says, “nurtures our national soul,” or “links the past to the future and connects all of us to the purpose that guides us?” Why would Republicans quibble with a program that influential?

Canadians should be paying attention. We have a similar funding body keeping our identity story fresh. The Social Sciences and Humanities Research Council (SSHRC) is responsible for enabling the creation of much of Canada’s new academic knowledge in the liberal arts. Those stories position Canada among other countries as successful and healthy, and help demonstrate Canadians can engage with the world in meaningful conversation.



SSHRC facilitates the development of a smart brand for Canada, but we can’t take its work for granted. The projects it funds — some mainstream and popular, others odd and obscure — may collectively add up to a picture of how intelligent people define our identity, yet there are many people quick to dismiss it.

As a facilitator, SSHRC receives few accolades and isn't widely understood. SSHRC has to explain itself and take more credit for its own story for no other reason that strong brands are a form of protection. If the public can come to appreciate SSHRC as an enabler to Canada's success, then "anyone seeking to cut funding will," as Jim Collins once wrote, "have to contend with the brand."

Otherwise the Canadian philistines — and they are out there — may find it easy to de-fund SSHRC when they get the chance. It isn't hard to imagine a so-called populist Conservative government, modeled on Trump's administration, advocating similar cuts.

We need more open dialogue about funding the telling of Canadian stories — more support for our storytellers — not less. My message to our politicians: don't curtail the work of organizations that facilitate the building of national identity. Whether that enabler is SSHRC, a museum, the National Archives, the CBC, TVO, the National Capital Commission, Parks Canada or others like them, their work is building the smart brand Canada needs in ways we can't always quantify or appreciate. Collectively, however, their impact is immeasurable. It's in our best interest to sustain their work.

A most valuable audience: *the constituency of kids.*

Abstract

How can you build a sustainable brand? Telling your leadership stories feeds your brand by effectively nurturing the interests of underserved audiences. Museums leave the constituency of kids on the table – their future supporters – by neglecting to reach out to them after they've left the museum. As a result, kids don't turn to museums as a source for information in their educational journey. If you want kids to talk about what you know and to start asking questions, you need a map that shows what you know, and a strategy for how to take advantage of it.

Most organizations try looking for untapped value, some little gem that can be developed to help them grow. Nurturing the constituency of young museum-goers should, for that particular sector, be one of those gems: kids are all for museums. But are museums for kids?

Kids are nothing short of how a museum can build a sustainable brand. They show up with at least one adult, and many times in groups; they often shop and eat; they come back. They are a big reason why you sell memberships. They see the museum as a real-time experience – “I’m here, now show me something” – but not as part of their educational journey. Museums connect them to programs at an early age but don’t maintain that link as they get older. This is the brand gap you need to fill.

You can effectively nurture the interests of this underserved constituency and potentially hang on to them for years if you start telling them your leadership stories. They’re curious (have you ever known a kid who doesn’t like to ask questions?). Branded content from museums is magnetic – it not only builds the desire for them to keep visiting, it keeps them connected (and asking questions) between visits.

The value of publishing is that it exposes your intellectual blueprint. It’s true for any organization: stories tell people what you are all about. They help you appear vital and responsive to peoples’ essential curiosity. And people want to associate with (and support) organizations that engage their interests and offer them new ideas. In other words, storytelling feeds your brand.

iPads and iPhones connect many kids at a very young age. Parents often are reticent (for good reason) about giving them unchecked access to digital devices, but that reticence dissipates if parents know their kids are interacting with good content. Content perceived to have educational merit is at the top of their list because it is trusted: not just attractive products but “actually something parents want” because it removes the angst of knowing what to buy their children. It is parents themselves who confer the “good housekeeping seal of approval” on museum books.

To retain their interest the stories still have to be good. Kids are turned off by the heavy-handed tone of many stories produced for them. They just want a good story. Sophisticated history and science isn’t “above” kids, we just have to tell stories

better, in a way they want to hear it. If the story isn't well-conceived and engaging even the name 'Smithsonian' won't help," said Bill Burnham, the publisher of Soundprints, a firm that collaborated with the Smithsonian.

Fun, Fact, Fiction

Being able to give young readers what they want requires a blend of fact, fun, and fiction – and an avoidance of the urge to cover everything at once. Fictionalizing history isn't a crime: kids need to blend the truth with their own unique sense of fascination. If you entertain them and they pick up some knowledge along the way that's something parents will appreciate.

Unlike the critics who savaged the CBC's *The Story of Us* docudrama for not being exhaustive, Naomi Buck believes the series was an achievement because it resulted in the impossible: not only did it get people talking about Canadian history, she writes, it appealed to "impressionable" children who expected their parents to tell them more: they had questions and wanted answers.

Museums could be provoking the same reaction among children if they started transforming their content into compelling stories with interesting characters. They offer so many potential storylines, but neglect to reach out to kids after they've left the museums. Says Buck, "to date, I have had no luck getting my kids excited about museum objects on display, no matter how authentic, whereas nothing could drag them away from the drama of a well-staged bison hunt by horse-riding Nakota, or Viola Desmond refusing to relinquish her seat in a movie theatre or Waneek Horn-Miller reflecting on what it meant to be stabbed in the chest by a soldier's bayonet in the Oka standoff."

Are you wondering why kids looking for Canadian history and science stories haven't really been well-served by museums? The problem is that while many curators – the gatekeepers of content – intuitively know there are great stories to tell, and may understand children's publishing has dramatic marketing power, some continue to feel it simply does not fit with what they do; that marketing to children may undermine their organization's scholarly objectives. If the fight for content continues to lurch between brain food and education to entertainment and charges of "Disneyfication," telling stories will continue to get pushed to the side.

Organizations lean increasingly on technology to get people engaged, but technology alone can't tell your leadership story. And there has been no real breakthrough in connecting classroom with museum content; kids don't really turn to museums as a source for information.

Reverse that course by considering everything you do as fodder for storytelling: cultivate a broad view of the opportunities that can promote your expertise, along with the ability to continuously sense and act on those opportunities. Few organizations – whether non-profit museum or Fortune 500 corporation – adequately realize the commercial potential for their hidden intellectual capital assets. One problem is not knowing what's there: even the former CEO of Hewlett Packard, Lew Platt, once remarked "I wish HP knew what HP knew." Finding the organization's knowledge requires a map. Developing a strategy for taking advantage of the organization's intellectual assets requires someone to sort out what's there and what's worth marketing. And, once they find it, to give children what they want, you have to stop pretending staff can write for kids.

How we tell the story needs to adapt – if it does, museums will be for kids. And then kids and organization-alike will reap the benefits.

In a crisis, does your brand say “leadership”?

Abstract

There is a cost to being passive about telling people what you know: you marginalize yourself by not speaking out. Branding is about trust, and if people don't hear or believe your messages they will believe someone else peddling a different message. Nature abhors a vacuum: when your message doesn't get out, the door opens to people with louder voices who then control the discussion – and your agenda. The best way to be judged fairly when something happens is to explain yourself and ensure your brand says “leadership.”

Your leadership story can change the world. Or save your organization. Or both. At the moment, I'm thinking about the power of documentary films. For a lot of people seeking to bring about social change, the documentary film has become the tool of choice. The form has demonstrated its ability to communicate widely, and produce results such as compelling major policy changes in government and corporations, alike. Stories told in this form are so impactful that a couple of years ago the Ford Foundation announced it would put \$50 million into helping produce independent documentaries. Over the last century, foundations have made individual grants to individual organizations—a piecemeal approach to solving problems. Now foundations are trying to create tipping points that bring about meaningful change. The documentary, they feel, can do just that.

Even short documentaries are making their mark. For decades, pundits submitted opinions to newspaper op-ed sections for publication. In 2011, The New York Times decided this concept deserved updating, so they introduced Op-Docs, a forum for short documentaries covering current affairs, contemporary life and historical subjects. Since then, over 200 Op-Docs films have been posted (some earning Oscar and Emmy nominations), making the Times one of the most acclaimed and influential destinations for online documentaries (or, as it is called, unfairly but tongue-in-cheek, “short attention span cinema”).

The aquarium better known as Seaworld got a first hand lesson about the power of documentaries in 2013 with the release of *Blackfish*.

For years, Seaworld put on (with apologies to Ed Sullivan) “a really good show”, but not a very informative one: trainers stuck to prepared scripts presenting light-hearted, upbeat general “factoids” that didn’t say much. When a PR crisis struck—triggered in this case by the highly-public and publicized death of a trainer during an orca show—it seemed clear that SeaWorld really hadn’t communicated much of a message about its commitment to saving marine life.

When the media started asking questions about the appropriateness of live-animal shows, anti-captivity activists were ready. They had already been telling in-depth stories about their own unique research and about the effect of captivity on whales. SeaWorld, with its thin story, couldn’t compete in the information game. It quickly lost control of the discussion; activists leveraged their expertise to direct conversation and set the agenda.

It was telling that CNN's Wolf Blitzer told an anti-captivity advocate "It is fascinating to hear an expert talk about this." To the media – searching for leaders who would answer their questions – the unique insights presented by anti-captivity advocates made them believable. Activists made it easy to believe Seaworld was more interested marketing Shamu plush dolls; this, in turn, made their rescue operations seem like cynical PR stunts, rather than opportunities to raise awareness about animals in the wild.

Just as Blitzer seemed neither to trust SeaWorld nor see it as an expert, others followed suit and the tide turned against the organization. Ultimately, the fallout from *Blackfish* forced Seaworld to revamp its business model; its whale shows have been discontinued. I'm not debating here whether it's right or wrong to keep these intelligent mammals in captivity, but the impact of this documentary is a useful, cautionary story.

How do you stave-off a public relations disaster if you are passive about telling people what you know?

Sadly, the Vancouver Aquarium failed to heed the *Blackfish* warning; it should have known better.

For the last sixty years, it has welcomed visitors wanting to see things otherwise hidden from sight. It's a cliché to say we know the surface of the moon better than our own ocean floors, but that is the essential value of an aquarium; it is the agency by which we understand the ocean and its occupants. People need to "see" to feel connected with marine life and care about their survival. The Vancouver Aquarium gives them that, playing an indispensable role connecting and educating millions to oceanographic science. It is also a credible and well-informed environmental activist in its own right, adding vital missing knowledge to the body of oceanographic science.

Although few aquariums match the high standards set by the Aquarium for rescue, rehabilitation and display of cetaceans, that didn't seem to matter to politicians. On May 15, 2017, the Vancouver Aquarium learned people didn't really appreciate what goes on there when the city's Park Board (which controls the land on which the Aquarium operates) voted 6 to 1 in favour of immediately banning whales, dolphins and porpoises in captivity – even injured ones – at the Aquarium.

Why? The Aquarium has been just like many fundraising organizations that are passive when it comes to telling their story – and that comes at a huge cost. Doubting science is an everyday part of culture, and research organizations haven't been speaking sufficiently clearly, vividly and publicly to a popular audience about why their work matters. As a result, an information vacuum is created, so one-sided stories and private theories about oceans and marine life often go unchecked.

**Remember Seaworld's lesson...
What happens when you
don't effectively tell your story?**

Seaworld found out at least two things: first, people see part of what you do, but not all of it. Second, not getting the message out leaves the door open to people with louder voices who then command the agenda. The board's decision wasn't necessarily the voice of the people, rather the people in a position of authority didn't trust the Aquarium; they chose to believe another, louder voice, in this case, the same anti-captivity activists who targeted SeaWorld.

A strong brand is good protection

A brand should be a form of protection, and it should mean politicians – who don't know as much as the experts – tangle with the brand at their peril. Branding is about trust. People have to believe your messages, or they will believe someone else who is peddling a different message. The Vancouver Aquarium brand proved not persuasive enough, not strong enough, to protect it from its detractors. When Parks Board commissioner Catherine Evans said the Aquarium has to “catch up” in terms of the ethical treatment of animals, she was clearly stating the board didn't trust the Aquarium message. Thus emboldened, the Board dismissed – at a swipe – the Aquarium's mission to be a player working to solve the world's environmental problems. By rejecting the display of rehabilitating cetaceans, they essentially said it is to be nothing more than a tourist attraction (and a lesser one at that).

And that lack of trust is too bad because the Aquarium is, says Andrew Trites, director of the UBC Marine Mammal Research Unit, “an incredible resource that has advanced researchers' understanding of the pressures marine mammals face.” Why couldn't that story have been told?

Ironically, in his book about activists and SeaWorld, Kirby does vindicate the efforts of one display-industry organization: none other than the Vancouver Aquarium, which had long given-up keeping orcas in captivity, and now believed “whales were not a lost cause whose only salvation was public display.” In fact, Kirby tells readers it was the Aquarium’s view that “the answer to problems such as pollution and orca-habitat spoilage was not to build a Noah’s ark of ‘human care,’ the answer was to heal the sea.” That is, in a nutshell, the Aquarium’s mission: research, education and conservation. Kirby understood the Aquarium is about scientific leadership, unlike SeaWorld’s entertainment leadership; but alas, the Parks Board refused to trust the Aquarium story.

The right catalyst

Organizations may scratch their heads and wonder why they aren’t having greater impact on people. They may want to see themselves as playing “a major role as a focus of reflection and debate,” says Edward Rothstein (“New Insights into History may skew the Big Picture,” *New York Times*, 19 March 2014). If achieving this “remains beyond their reach” it’s because they ask “how do we...?” without ever getting a proper answer. Whatever the question, the answer is relevant content. If any organization wants to be trusted, substantive content – stories that demonstrate your leadership – is the right catalyst.

Your organizational brand could be positioned as an incredible resource providing intelligent thinking on vital national issues, but it will marginalize itself if it doesn’t assume a leadership stance and speak out authoritatively on issues of public interest. If your organization doesn’t seem to matter in today’s great debates, its lack of storytelling make it appear “less and less accessible to the general public” says Nicholas Kristof. The result will be that people see it as irrelevant and anachronistic. Who wants to associate with or support a brand like that?

Articulate organizations that keep people engaged and talking about their work are able to prove their organization is worth the cost to politicians, taxpayers, foundations and ordinary donors, and to anyone who grudgingly surrenders resources. The Aquarium, on the other hand, didn’t tell a good story and made it easy for the Parks Board to swing its axe.

“How are scientists going to get money from policy makers if our leaders and legislators can’t understand what they do? If they can’t make clear what their work involves ...they won’t fund science.”

Alan Alda, quoted in Claudia Dreifus, “Science so Everyone can get it,”
New York Times, February 24, 2014.

Does your brand say “leadership?”

The best way to be judged fairly when something happens (and it will) is to be prepared: establish your identity in peoples’ minds before problems strike. Explain yourself. Tell your story. The more thoroughly embedded their perceptions, especially with respect to credibility and trustworthiness, the more likely the organization will weather the storm. That is the lesson from SeaWorld and, now, the Vancouver Aquarium.

In previous years, documentaries were accessible to people who made an effort to be informed via TV screens, film festivals or DVDs. Netflix has changed that, so has the web. Your constituency of young people really do pay attention to this far-reaching medium. Every organization needs to be aware of how powerful the digital realm has become. *Blackfish* was impactful because it was “everywhere.” The Ford Foundation obviously sees the power of digital storytelling. How are you reaching the masses and building trust in the power of your mission?

You can access a broader audience – and get content to people when and where they want it – but those people want a good story. *Blackfish* was impactful because it was both compelling and “everywhere.” Your constituency of young people really do pay attention to this far-reaching medium. The Ford Foundation obviously sees the power of digital storytelling. How are you reaching the masses and building trust in the power of your mission?

A better story might have built the trust that Seaworld and the Vancouver Aquarium needed to defend their respective missions. A documentary or two, a series of Op-Doc-style videos, engaging stories told with virtual reality, more substantive digital content, personalized content delivered to their followers – all of this – might have helped them change the world...and protect their worlds.

What makes people care?

Abstract

Storytelling is not a marginal activity. An organization can't have all its assets working if storytelling isn't at the center of its strategy. Can you generate creative ideas from the inside? Open the door to thinking and talking about new ideas. If you want to develop and maintain an innovative thinking culture, find your idea generators. The people who bring compelling ideas into organizations are unique: eclectic, boundary-spanning thinkers who involve others in conversations.

A sense of “purpose” clarifies what your company does and how it wants to stay relevant in a rapidly changing world. It does not, however, address how you get people to care about your purpose. That’s where branding comes in. Expectations about the transformative effect of a strong brand are very high, but telling the story about your sense of purpose is a chronic challenge when organizations rely on tactics that aren’t up to the task. The result is that managers are often disappointed when, despite the expense, the standard branding tactics on which they rely – logos, advertising, mission statements, taglines, media relations, direct mail, dramatic new architecture – appear to have minimal impact.

Branding needs a new philosophy. It gets one from Ann Chistiano and Annie Neimand in “The Science of What Makes People Care” (*Stanford Social Innovation Review*, Fall 2018). They tell us organizations need to stop trying to raise awareness because, too often, it reaches the wrong audiences where messages get ignored, cause a backlash, or even harm. Instead, to compel people to invest their attention, emotion, and action in your work organizations need a communication strategy that results in belief and behavior change. First, they suggest, tell better stories: storytelling is, simply, “the best tool we have for helping people care about issues” because people are more likely to remember information they get in narrative form. Second, use those stories to find your community.

You’ll do that more easily if you make the brand about “them.” All too often organizations sound like they are demanding attention because they aim their communication toward building profile with messages that are more about them than their audience. Chistiano and Neimand tell us that rather than making communication sound like a megaphone, make it “a gift to your audience” where you help them solve a problem. What is it you want people to believe and do? People engage and consume information that aligns with their values or world view. If you connect to what they care about you can help people see where your values intersect and how the issues you are working on matter to them.

**Rather than making communication
sound like a megaphone, make it
“a gift to your audience.”**

How are you building trust in the power of your purpose? Storytelling is not a marginal activity, and your ability to produce a steady supply of fresh and compelling stories is more critical than ever.

The Chistiano and Neimand article reminded me of a now-old but still very valuable book: *The Invisible Grail: In Search of the True Language of Brands* by John Simmons (Texere, 2003). Simmons had once worked with Interbrand to revive the Guinness brand through storytelling; the book was his chance to tell readers that organizations can't have all their assets working if storytelling isn't at the centre of their strategy.

If an organization doesn't want to be seen as being like everyone else, he wonders, why do they neglect the potential of language to creatively demonstrate its unique personality? That's because they see words "as dummy text," not as a creative resource; they consistently deny time and space to words out of the belief they're plain and unexciting. Simmons assures us, however, that storytelling and creative business writing are not marginal activities and that organizations must bring their capability for expressing identity in verbal terms in-line with more traditional practices of expressing identity visually because it is words that truly engage a person's imagination and helps them understand the brand's meaning.

Stories succeed because a narrative approach grabs people emotionally and is the best way to explain abstract concepts and galvanize support. Simmons tells us about Anthony Trollope, more familiar today as a novelist than as a bureaucrat, who was a senior official of the British Post Office. He recognized engaging language would more effectively advance his departmental work and he intentionally crafted reports that were pleasant to read. Similarly, 3M encourages the use of narrative over bullet points in presentations because it recognizes stories are uniquely capable of carrying the day.

Christiano and Neimand ask if their readers' organizations are telling a real story or just sharing messages? They feel that while many have embraced the concept of storytelling, many use vignettes or messages, not actual stories that are either interesting or compelling; they don't pass on new insights. They argue that "investing your communications resources simply in spreading information will not inspire anyone to get behind your cause."

Where are your insights and leadership? What you know, and how efficiently you use that knowledge, is where differentiation resides. Fundamental change is necessary if companies and brands are to develop their own distinctive stories. How do we establish a culture of storytelling, open the door to thinking, talking about, and reflecting on new ideas? Ask who will find and write the brand's stories and Simmonds says it's likely the question is answered with a blank look because most organizations feel more comfortable hiring a project manager or conference organizer than a creative writer.

Management traditionally stifles creativity from within the rank and file. It is hard to generate new ideas when standard business practices drive out people with diverse ideas: tightly-scripted, micromanaged organizations endanger their future when employees fixate on narrow, preexisting ideas. But “what good is a master carpenter who is never available to his apprentices...because he is scared to give away his preciously acquired skills...?” (Krogh, Ichirjo, Nonaka. *Enabling Knowledge Creation: How to Unlock the Mystery of Tacit Knowledge and Release the Power of Innovation*, Oxford UP, 2000).

Few organizations recognize that their heroes should be the idea people who believe better management of knowledge assets yields a competitive advantage. These are people who are convinced organizations can change if a golden idea emerges and they look outside their field for new approaches – not fanatical, nor trendy, but they are boundary-spanning and eclectic. So, if you aspire to develop and maintain a strong brand, and a culture of innovative thinking, nurture your idea generators – they're always “on.”

What makes them a vital resource, however, is their practice of involving others in discussion. They shape the conversation, unite the team, and make building a compelling vision attainable. The informality of this kind of simple talk is a remarkably effective technique to get employees moving in the same direction. A new system of values and an idea-friendly culture will emerge if managers let ideas percolate. By permitting members to think imaginatively about what their organization can become, and communicating the kind of values the company wants to promote, a common understanding of the organization's purpose will emerge. And from this comes the breakthrough you hoped your branding would achieve in the first place.

We can't overstate the importance of original and compelling stories. The public won't automatically accept your claim to leadership just because you have a tagline proclaiming it, and you can't stay in people's minds if you don't say something worth listening to. You can't generate quality perceptions of your leadership in the marketplace unless you add your organization's unique and substantive point of view.

Original and compelling content tells everyone you know something other organizations don't – that's the starting point for market leadership. Being the focal point for discussion and shaping the conversation is part of the leadership for which people expect of a leading organization; articulate organizations lead vital public conversations and trust builds around organizations that explain why they are leaders.

Content is a catalyst to drive engagement, and community will gather around your ideas. Use your content to stand out in a cluttered marketplace. Live in the minds of people by providing anytime, anywhere, access to what you know regardless of where they live.

Appendix 1

What is Leadership Branding™ ?

Leadership Branding™ is a strategy focused on the primacy of ideas, leveraging institutional knowledge as a key branding resource. It isn't just another branding strategy exercise, but a transformative leadership undertaking where companies seek to convey the deep intellectual capital that is the cornerstone of their brand.

The ability to influence people's minds primarily through communication is waning. Brands can no longer expect people to act on the dubious appeal of catchy slogans and shallow campaign messaging alone. Effective differentiation demands tactics that standard marketing- and design-based branding approaches are not equipped to provide.

**Capture your organization's thought leadership
and package it to power your brand forward.**

Let your peers get stuck playing by yesterday's branding rules. The goal of Leadership Branding™ is to transform purpose-driven organizations into trusted and indispensable providers of valuable, relevant knowledge. Its aim is not simply to increase brand awareness – which by definition requires reaching out to a broad target audience – but to ensure brand depth is established so more people believe in the relevance of their work.

**Helping companies do this
is the goal of Retool Lab's
Leadership Branding™ approach.**

The solution to the branding challenge facing most organizations today does not reside in the realm of marketing or communications – at least not in any of the ways agencies overwhelmingly practice it. Building a meaningful brand identity is a chronic challenge for service and knowledge organizations choosing to rely on tactics best-suited for the packaged goods industry.

While necessary, employing these tactics on their own will yield only limited results and usually at a very high cost. Unless you are selling consumer products where success depends on selling millions of units, standard brand building strategies relying on marketing or advertising are not for you. In those cases, the intent of the branding process is to push messages out to customers in the hope that the target audience's thinking will magically align with the intent of the marketer. This requires an extensive media spend, and can only be accomplished through repeated exposure and sometimes through manipulative engagement tactics.

What will it take to raise your organization's profile and reputation within and outside the organization? Stop messaging and start branding. Organizations wanting to promote core values such as leadership, innovation and ideas need a more sophisticated approach to branding strategy, one providing evidence of their true value through sustained action, consistently, and over time. They need ideas that touch their minds, their hearts, and the things that innately motivate them to take action.

The Participatory Brand.

Service and knowledge-producing organizations need to build their brand by employing a "pull" mechanism to draw people to it – not through advertising-style headlines, but by example.

Strong brands emerge when organizations leverage their unique knowledge and capitalize on it by turning it into knowledge assets presented in relevant formats, to be used to promote institutional expertise and value.

Organizations aspiring to possess a "communicating brand" seek to constantly increase their ability to engage minds and keep people captivated. They have the arsenal of engagement tools to keep audiences interested in their work, to nurture an emotional bond over time, and turn themselves into the brand they need to be... the brand people need them to be.

Self-identifying audiences want to engage with organizations that produce leading ideas and that are a source of valuable insights. Leading institutions know this and that is why they obsess about providing evidence of their leadership and value every day, in a thousand different ways.

Leadership Branding™ vs. Brand Leadership

Leadership Branding™ is a positioning strategy where the value of a brand is shifted away from its marketability to the masses and re-oriented towards its relevance to carefully curated audiences. This curation process is in fact a form of inverse targeting where the customers self-identify by forging affinity for brands on the basis of the value of the ideas these brands contribute to their lives and businesses. In this way, the leadership of a brand is not an external measure of its market performance but an internal measure of trust, and of its ability to generate trust.

This makes sense on a number of levels, not the least of which being that many organizations competing with global players in highly competitive markets cannot reasonably expect to become the market dominant brand within their sector. They must adapt, and they must outthink and outmaneuver their larger, more visible competitors.

Appendix 2

Retool Lab and Retool Brand Counsel

Leading With Purpose

Our clients are purpose-led organizations. They have aspirational reasons for being, beyond profits alone, and place their social contribution on par with their business interests. They are found in every sector all over the world, harnessing the power of purpose to connect their audience to their brand and deliver highly-valued products, solutions and services.

About Retool Lab

Retool Lab is a research-based brand strategy thinktank comprised of a collaborative of culture and commerce experts focused on helping private and public institutions reshape and retool their strategies as a springboard for thriving into the future.

Striving For Relevance

Retool Lab will help your organization understand how to thrive in an environment that may no longer be conducive to attracting on-site visitors.

About Retool Brand Counsel

Retool Brand Counsel connects audiences, brands, and purpose. We help organizations reshape and retool their brand with communications and creative services structured around your priorities, to deliver a singular outcome: an engaging brand that sets your organization apart and on the path to leadership.

Striving For Differentiation

We believe that every organization, regardless of size, provenance or means deserves to be well-branded, strategically, creatively and affordably. We diligently balance market factors, purpose and organizational competencies as the co-foundation of your brand communications programs, to generate trust, build relationships and ensure the connection between brand and purpose is made clear to your audiences.



Jean-Pierre Veilleux

Brand and Creative Strategist

Principal, Retool Lab – Retool Brand Counsel

Jean-Pierre is a fluently bilingual senior brand communications and creative consultant who leads the planning, strategy, design and implementation of brand and marketing communications programs. He has over two decades of experience acquired as a senior branding executive with leading brand consultancies, where his focus has been on helping organizations of every type leverage the power of branding and communications toward the achievement of their business goals. Prior to founding Retool Lab and Retool Brand Counsel, he joined the Argyle Group, and co-founded Argyle Brand Counsel+Design (ABC+D). While President of ABC+D, he was also acting as Executive Brand and Creative Director with Argyle Public Relationships. His previous positions also included Vice President, Strategic Communications and Design with Publicis Canada. He also co-founded and was President of Leapfrog Designed Communications, 1993 to 2004.

Jean-Pierre's experience spans a wide variety of sectors. Some of the organizations which have used his expertise include the City of Guelph, North York General Hospital, Toronto Economic Development Corporation, YMCA Canada, Conseil Scolaire Viamonde (Ontario French independent school board), OPHEA (the Ontario Physical Health Education Association), The Ontario College of Teachers, the University of Waterloo, the University of Western Ontario's Richard Ivey School of Business and Georgian College among others.

Jean-Pierre also possess a clear understanding of the specific needs and distinctive character of industry representative organizations. He has led and implemented major brand communications and creative design initiatives for a number of professional, regulatory, and membership and advocacy-based organizations, as well as for delegated administrative authorities (DAAs).

Jean-Pierre is a graduate of the Ontario College of Art and Design (OCADU) in Toronto, as well as the Strategic Marketing Management program and the Innovation in Marketing Management program of the Richard Ivey School of Business.



Robert Ferguson

Brand and Content Strategist

Principal, Retool Lab – Retool Brand Counsel

For every client who wants to know “what will cause people to support us?” Robert has an answer. He is a strategic thinker focused on the impact ideas and content have on

extending brand awareness about leadership. He understands that the story told by most organizations requires too much explanation, and consequently they struggle with how to tell the public what they do, and how to get their message out.

For 20 years Rob has helped organizations like hospitals, museums, universities, government agencies, and professional service firms understand themselves and promote their core strengths. He helps clients answer “who are we?” by developing strategic and authoritative narratives that can be used to reinforce core values, make the case for change, motivate people to overcome obstacles, and engage stakeholders in the lasting purpose of their institution; unified and coherent storylines that capture core brand messages, and makes the organization distinctive and uniquely worthy of support.

Prior to founding Retool Lab and Retool Brand Counsel, Rob was a senior advisor to Argyle Brand Counsel and Design about how its clients effectively and actively communicate their respective brands, expertise, and missions to new audiences around the world. His focus is on brand and content strategy, research, and market positioning.

Rob is a graduate of Queen’s University and the University of Toronto (history and international relations), and is the founder of Knowledge Marketing Group (1999-2013). As a writer he has been a keen observer and critic of nonprofit institutions. His writings have been collected in two publications: *Contrabrand*, and *The Alchemy of Content*. In his spare time, Rob is researching a book tentatively entitled “This Tricky Balance: Pierre Trudeau, the RCMP Security Service, the McDonald Commission, and Competing Visions for Canada, 1970-1984.”

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