

About Red Ant

Established in 1999, Red Ant has had one clear aim – to provide clients with all the expertise, talent and intelligence they need to engage effectively to their customers through digital.

With a focus on strategy and delivering measurable ROI, Red Ant's team of in-house experts has a reputation for excellence when it comes to planning, creating and delivering world-class digital campaigns.

To find out more, visit www.redant.com

Key Ants



Dan Mortimer – CEO

With over 11 years' experience in the digital industry, my knowledge of the online space enables me to think creatively and challenge briefs. My passion is strategy and showing how digital can open new opportunities for clients. I love working with the team to come up with ideas to push brands for maximum exposure and return through digital communication and engagement, utilising the correct tools for the campaigns.



Richard Conyard - CIO

I have been working with and developing for the web since an internship in the USA in the summer of 1994, not quite the commercial beginning, but not far off. Since those days I have held a number of different positions and worked with a number of different companies and brands, including the AA, Airfix, Andrex, Barclays, British Gas, Cattles, Filofax, The FT, Goldfish, Lonely Planet, MHRA, MTV, Scalextric, Sony, Symantec, Volkswagen and more.



Paul Bidder – Commercial Director

I'm focused on delivering return on investment solutions to meet clients' business objectives and campaign aims. My background in IT management and consultancy gives me a solid understanding of businesses who want to get the best from digital communications and eCommerce. I've worked with a number of leading brands to develop robust, long-term strategies which deliver measurable ROI.



Dan Hartveld – Director of Mobile

In the emerging field of mobile commerce, I am a knowledgeable and trusted expert and advisor with a proven track record in real-world business. From 2007-2009, I led the online grocer Ocado's Mobile Devices team. Originally developing custom internal applications for deliveries and stock control, from 2008 I managed the design, implementation and support of the UK's first grocery shopping application, "Ocado on the Go" for iPhone.



Alex Estrella – Director of Film and TV

I have more than 15 years' experience working with some of the world's biggest brands, including Disney, Virgin, Nokia, BT and Caterpillar. I'm also one of the UK's leading directors in Musion, a ground-breaking 3D animation technique, and my work on Toyota Auris won the IVCA award for innovation. I've been instrumental in productions for Sky, BBC and Channel 4, and I'm a lecturer in film at the National School of Film and Television.

Editors note

Red Ant released the first white paper 'Planning and creating a digital strategy' in September 2009, with an expected follow up on how to run a digital strategy. We are happy to note that there have been thousands of downloads of the whitepaper - it has been used for research and education purposes by a wide variety of organisations (most of it attributed under our creative commons release), and it has led to a growth of the concept of digital strategy as a whole.

Back in 2009 we noted that digital was the fastest growing area of marketing, customer retention and engagement, and a year later the same is still true. Media devices, smart phones for the masses and experiential/digital mash-ups have made our exposure to digital channels almost ubiquitous. We can engage in a plethora of different ways and, unfortunately in some instances (especially in cities with geo-location channels), enter into an electronic miasma of competing messages - not quite as bad as envisaged in Ridley Scott's Blade Runner, but still potentially alarming and confusing.

With the increased uptake of digital engagement, we find that the development of a robust digital strategy is more important than ever. The lessons we have learnt since the first paper are numerous, and the feedback we have received has been invaluable. If you have read the first edition then I hope you find this second one to be a valuable update, and core to your digital success.

Richard Conyard - CIO

Introduction

In 2009, the IAB (Internet Advertising Bureau) predicted that internet advertising – just one small part of a digital strategy - would overtake TV advertising by the end of the year. This was inaccurate – according to the IAB's own figures, internet ad spend outstripped TV ad spend a good three months before the end of 2009. The UK is now the world's first major economy to spend more on online advertising than on TV – currently, the internet takes 23% of all advertising spend, compared with 21.9% for TV. And, according to analysis by business consultants Price Waterhouse Coopers, over the last 12 months most digital media categories grew by more than originally forecast, despite a challenging economic climate which frequently had a devastating effect on other, more traditional marketing activities. Digital is clearly still the fastest growing area of marketing, customer retention and engagement. Inevitably, digital channels and engagement through digital channels are now not only an expected part of audience experience when connecting with a brand - they are often at the core of an audience member's engagement with a brand. Audience expectation has increased to such a level when considering brand engagement that:

- it is no longer acceptable for a brand to wait for the audience to visit
- brands must actively communicate to prosper
- positive engagement snowballs, arrogance creates stagnancy

What is digital?

Process definition

In short, digital is about finding the best way of achieving goals, normally promoting a brand or service, through electronic connected media. This could be online on the web, through specialist Internet applications, or through mobile phone applications (both network and Bluetooth connections). Digital consultancy can also tie into traditional media outlets, either as traditional first (bringing an audience into a digital campaign), or traditional last (by using an existing digital audience as content generators).

Digital can also be used to extend the process into a company's/brand's inner workings; improving the supply chain, gaining direct consumer or business insight through greater transparency and movement of the underlying data.

Emotive definition

Digital is the great equaliser and relationship builder. Humans by their very nature are communicative and inquisitive, and digital channels allow brands to interact with their audience on both levels. The level of involvement required by the audience to engage with a brand, in many cases a simple click of the mouse, shrinks the gulf between interaction and offline brand perception.

The greatest benefit of digital lies in its ability to forge individual relationships with the audience. Unlike any other broadcast medium, digital channels allow direct engagement with each member of the audience.

Definition by difference

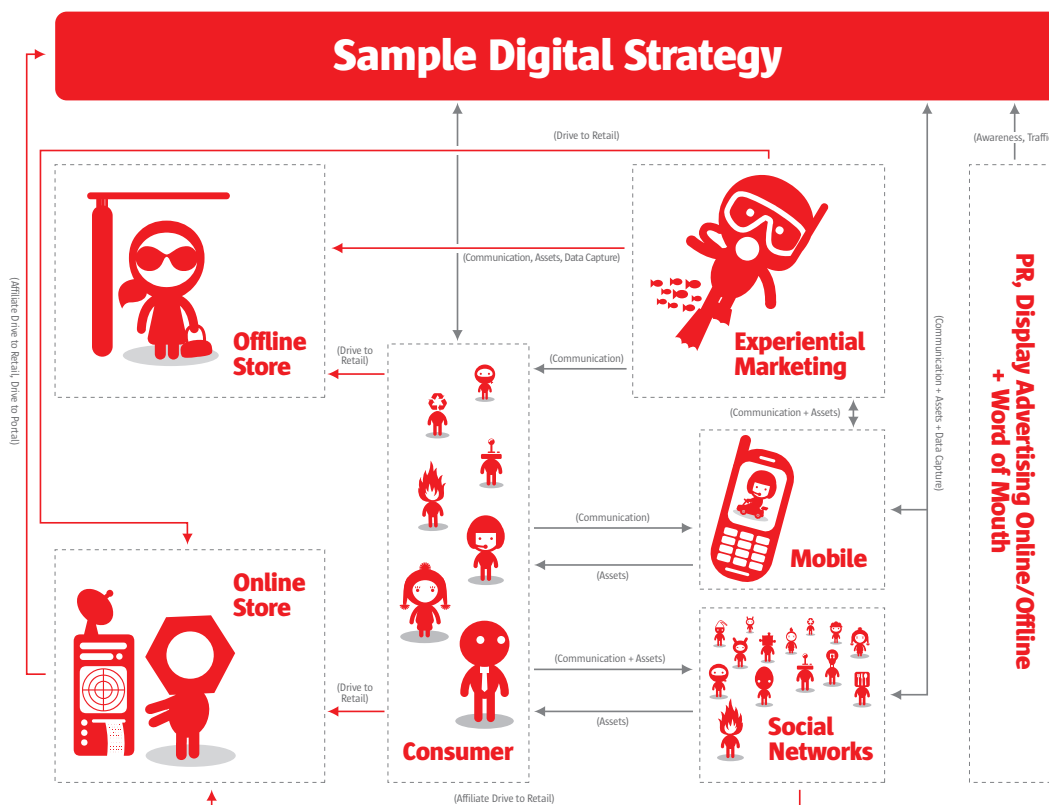
Digital offers brands new opportunities that traditional methods cannot easily match:

- Digital does not obey the line
- Digital can be broadcast and personalised
- Digital can be reactive as well as proactive
- Digital should be cost efficient
- Digital should always prove returns

Industry changing

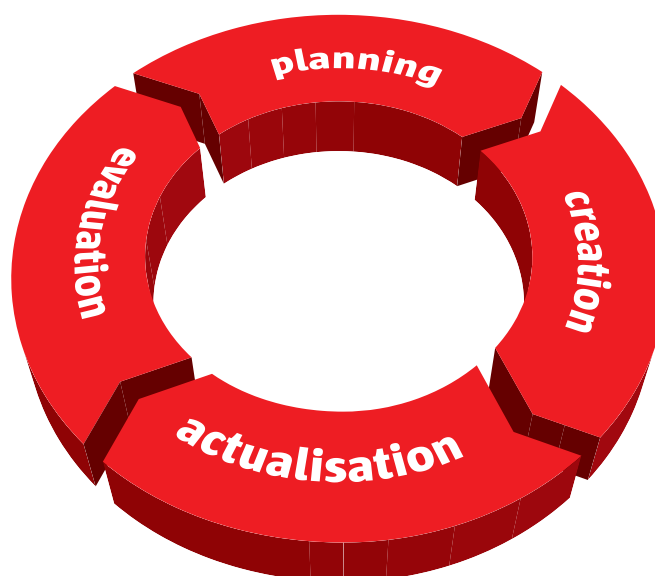
Digital strategy offers brands and companies new, unique ways of engaging with their customers and audiences to a far higher level than has been previously possible. Initial faltering steps in digital marketing such as PPC and SEO are the tip of the iceberg as to what is possible.

Well-conceived digital strategies and campaigns will push brands ever forward in the consciousness of their audience and lead to lasting adoption, advocacy and, over time, increase expectation from industries as a whole. From an audience perspective, digital allows the model to change from being a monologue to a dialogue.



Building a digital strategy

There are four core stages to building and running a digital strategy:



Each of these stages runs into the next to deliver a coherent digital campaign. Combined, they deliver an ongoing digital strategy as the audience and brand perception evolves.

Planning

The planning of a digital strategy involves analysing the following:

- The initial aims and expected returns
- The background of the brand, present positioning and perception
- The audience (broken down into key segments)
- Audience locations and value of each audience segment against initial aims

The planning stage deals purely in the analysis and identification of focus areas.

Creation

The creation stage is purely focused around campaign formalisation. This involves:

- Planning campaign elements based upon previous analysis
- Creating key performance indicators per channel and estimating expected return per channel
- Design and build of campaign elements / channels
- Planning and establishing actualisation routes, communication flows and expectations

The creation stage for each channel finishes on the launch of each channel.

Actualisation

The actualisation focuses on the delivery of the campaign, including:

- Building the engagement timeline
- Engaging with the audience through the engagement loop
- Sampling progress through a campaign and optimising the campaign message
- Recording salient information through each campaign step for evaluation

The actualisation stage runs as a microcosm of the strategy as a whole and relies on rapid responses to tune the strategy.

Evaluation

The evaluation of a digital strategy is imperative to learn the lessons of the campaign, including:

- Evaluating KPIs and fiscal achievement
- Reviewing engagement and unexpected longer term benefits
- Taking lessons on board to build stronger future campaigns
- Scoring the strategy and the benefits that it has given

Evaluation improves the effectiveness of future campaigns and strategies by becoming the key building block in planning them.

The lifetime and focus of a digital strategy

The lifetime of a digital strategy is a frequently debated subject. Given the different approaches, aims and strategies employed, there is very rarely a 'one size fits all' answer to questions concerning the length and lifecycle of the digital strategy. Shiv Singh, Director of digital marketing and social media at PepsiCo, and author of social media marketing for dummies states:

“Digital strategy means something that will change my bottom line in 3-6 months.”

This has a very definite lifetime. Pushed further, he goes on to explain that the timescales are technology based - so who knows what will be in vogue and / or available technologically six months from now?

Whilst Shiv Singh has a point, certainly when it comes to the bottom line, this does pose a further question; should digital strategy be constrained by a technological stand point? The definitions of a digital strategy in this paper, whilst embracing digital as an enabler, do not focus on digital at the centre of the strategy; rather, central to the strategies put forward in this paper is a clear focus on aims and audiences.

Caught by the buzz

It is all too easy for a digital strategy to get caught in – and be moulded by - the excitement and buzz of a trending technology. Those in digital marketing in 2008 and 2009 were often confronted by the statement: *“I would like an iPhone app”*. The nature and aims of the app became secondary to an often ill-considered desire to be seen as keeping up with the latest trending technology. For summer 2010 this has changed to: *“I would like an iPad app”*, still with little thought given to the aims and goals of that app. This approach misses out on some key precepts of digital strategy:

- Digital strategy should prove return
- Self aggrandisement of a company's marketing team does not always lead to improved bottom line
- The trendiest strategies are not always the best strategies for either audience or aims

This paper does not focus on trending technology. Audiences, whether they are businesses or consumers, and their interaction to deliver the aims of the strategy are the most important part, since they contribute directly to the bottom line.

Digital lifecycle

Digital strategies do not have lifetimes. Campaigns within a digital strategy are likely to have a set lifetime, but the strategy continues with evaluated aims and successes from previous campaigns taken into account and expanded upon. This is why the visual representation of a digital strategy is circular, each campaign building and growing into the next. Businesses and brands keep their core underlying aims for more than the 3 to 6 month window (there are, of course, exceptions). However, by cycling through short campaigns, strategies build and deliver against those aims, ready to move to the next set of brand-based challenges.



Stage 1:
Planning

Aims

Aims are the foundation of any digital strategy. They should be generic rather than specific at the planning stage, so as not to overload with detail. The detail behind the aims of a digital strategy will be defined by the digital strategy process. Concentrating on specific aims from the outset runs the risk of missing potential opportunities and channels of a digital strategy. Generic goals normally include increased awareness, building an audience and / or educating that audience, increasing reputation, and ultimately making the conversion. Limitations generally consist of conflict of interest with existing business practices and / or outlets, initial perception (both audience and reputation), and budget. Working with these goals and limitations, digital consultants can start to build clear strategies to meet these aims.

Whilst each brand will have its own specific aims and objectives, they can normally be aligned to one of these four main groups:

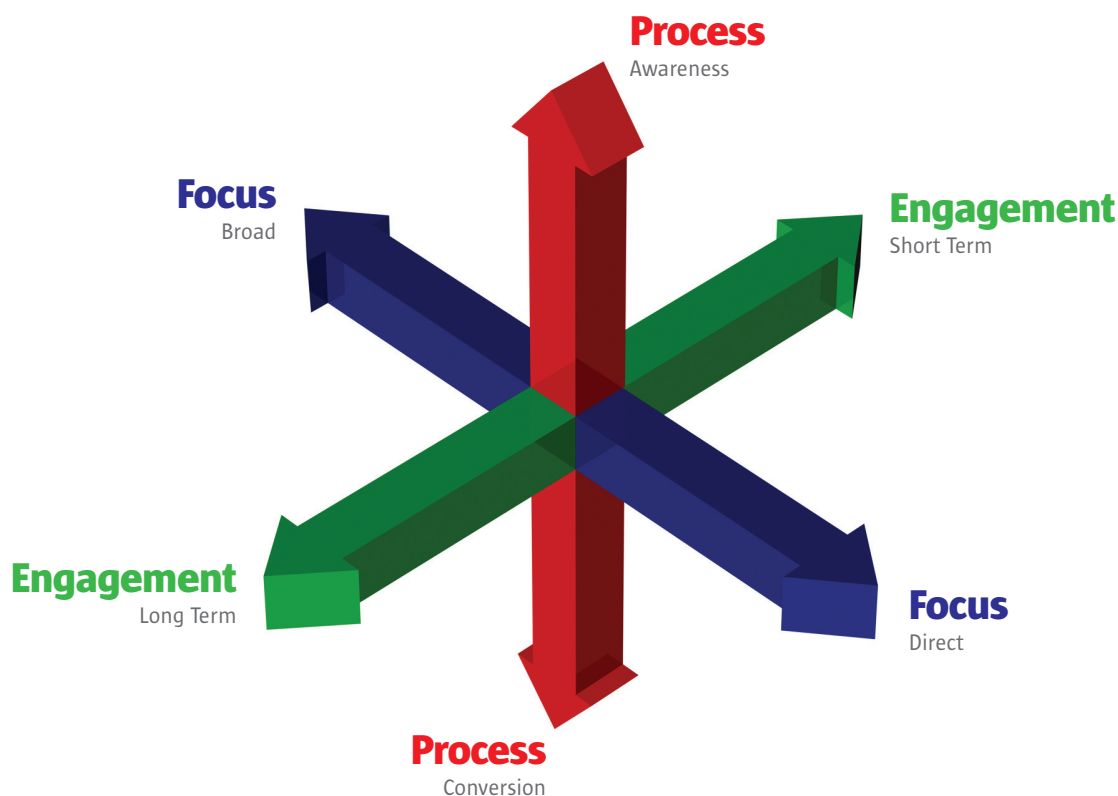
- Consumer awareness and demand creation
- Direct consumer drive to retail and purchase
- Education and incentive within the retail space
- Process improvement through streamlined communications

Each of these groups will have mirrored activities offline and it is imperative that any existing brand activities are covered within the background.

Positioning aims

Aims can be further clarified by ranking against:

- Focus: Aims can have a very direct and specific focus that can be achieved in few ways, or a broad focus that can be achieved in many different ways
- Process: Aims can require the audience to handle few or many steps (e.g. awareness as opposed to conversion)
- Length of engagement: Aims may have a short term turnaround or be long term engagements / relationships



Sample aims can be seen in the following table:

Reference	Aim	Focus	Process	Engagement
A1	Increased awareness of core brand products	Broad	Awareness	Short term
A2	Target audience groups likely to become long term consumers with below the line offline promotion	Direct	Conversion	Medium term
A3	Capture details of potential consumers for future campaigns	Direct	Conversion	Medium term
A4	Reaffirm core brand message of luxury and quality	Broad	Awareness	Long term
A5	Develop an audience around the key message to progress from influenced to advocates	Direct	Conversion	Long term
A6	Consolidate current audiences to allow easier message spread	Direct	Awareness	Long term

Background

Digital strategy cannot live in isolation from the existing activities and history of the brand. Before any meaningful digital strategy can be put in place, the brand must be understood inside and out. Misplaced brand identity within a digital strategy will at best lead to a misfiring campaign - at worst it can lead to long term damage for the brand in question.

The message for any digital strategy must be on brand or at least on brand aspirations, as defined in the aims. Whilst a subjective viewpoint is all well and good, living and breathing the brand will open up ideas for digital strategy that will take the brand to the next level. The creative stage and the actualisation stage will require a strong knowledge of offline marketing strategy activities. The most successful strategies have fully integrated digital and offline strands.

Understanding the background also helps to expose unrealistic aims and stops the digital strategy promising to deliver more than it is capable of doing. For example, a new product launch without any great seeding budget aiming to become a household name within a few weeks of the strategy commencing is highly unrealistic, regardless of the proposition of the digital campaign.



Audience

One of the core propositions of modern digital strategies is the role reversal of the audience from being a non-participatory group into an engaged and lively medium through which further brand advocacy can take place. Working with the brand audience in a positive engagement through digital marketing techniques can enable brand exposure to snowball, but the flipside to this proposition is that negative experience is also broadcast to a wider sphere. Audience management is a key factor in the actualisation stage; however, to work with the brand audience the first step must be to identify and understand each of its segments.

The diagram to the left shows a simplified message path of a single idea within a digital strategy. The idea is initially seeded through both idea creation and advertising (paid and unpaid). It is likely the idea will be picked up initially (but not exclusively) by existing advocates. Through them, the message will spread to those that will be influenced by the idea, namely further advocates and influencers within the market space. When conducted correctly, this can result in a snowball effect - an influencer aligns with an idea in a strategy and in turn encourages support from their own advocates, who go on to become ambassadors for the idea themselves.

The company background should be able to provide a snapshot of the audience taken from previous marketing activities, previous campaigns within an existing digital strategy and brand intelligence. Further insight can be taken from analytics tools that should be in place on all current digital activities.

One area of consideration that should be part of audience selection is that the current audience might not be appropriate for the aims of that particular digital strategy. Audience evaluation should consider expansion of the brand message into new segments where the digital strategy and brand aims require such outreach, and should not be hemmed in by previous assumptions.

Identifying your audience

An established brand should have a good idea of its audience through previous traditional marketing efforts. Digital and the audiences that it can reach should be used as an opportunity to re-evaluate the audience. Digital allows niche markets and subcultures of existing audiences to be targeted at a comparatively reduced overhead. Whilst the success of a digital strategy is not inversely proportional to audience segmentation and targeting, a balance should be reached where the message of a campaign within a strategy is focused enough to be relevant, but wide enough to engage with the correct size population to deliver returns without being too reliant on a small subset of people.

Subcultures and urban tribes

A subculture can be defined across standard demographic tranches (age, gender, ethnicity, education, class, location, etc.), but also - though not exclusively - by style, mannerisms and behaviours and argot. Once a digital footprint has been established for a brand, further identification of these interacting and engaging subcultures can be derived through analytical tools and regression techniques. For those brands without digital footprint, offline research should be conducted to evaluate patterns and trends in purchasing habits, audience snapshots, crossover into other established brands and metaphors of style. Through each of these techniques and others a subculture can be derived and used to build a digital persona.

Urban tribes, as coined by the French sociologist Michel Maffesoli and American journalist Ethan Watters, are a continuation of the subculture theme, often prized in B2C due to their movement away from traditional family structures to social interaction with urban groups with common interests; according to Watters, they are aged between 25 to 45 years old and have never married. In short, groups with if not significant then relevant amounts of disposable income.

As these self-selecting urban tribes move away from familial support structures and question or replace traditional parental hierarchies, the bonds of commonality become more pronounced. The argot, style and mannerisms of such brand aligned groups can be used both for audience identification and creation - something that the fashion industry has not been slow to recognise and that can (dependent on brand) be a driver in building engagement.

Persona building

Once audiences have been identified, they need to be brought into the structure of the digital strategy. The segmentation of audience into personas should not be limited solely to the identification of groups, but also to rate specific groups' alignment to the stated aims. *"Who is my audience?"* is in part an irrelevant question when factoring against *"who in my audience will be best suited to delivering my aims?"*.

Two sample personas can be seen below:

Existing customers (Audience A)	Targeted customers - First time car buyers (Audience B)
<ul style="list-style-type: none"> • Male/Female 18 to 32 • Full-time worker • Single or married • Technically adept, comfortable online, but not advanced • Homeowner or renting 	<ul style="list-style-type: none"> • Male 18 to 24 • Higher education • Single or in a relationship • Technically adept and highly active on social networking sites • Still living at home
<p>relation to aims</p> <ul style="list-style-type: none"> • An audience in which to increase awareness, and maintain top-of-mind positioning • Most likely to be in the market regardless and as experienced consumers they are looking for the best experience at the best cost • Most likely channels are LinkedIn, Friends re-united, business magazines & broadsheet newspapers 	<p>relation to aims</p> <ul style="list-style-type: none"> • An audience in which to tap into and gain Awareness • First time car buyers with low disposable income that will only be able to afford used cars • Most likely channels are Facebook, Twitter, MySpace, Google and Autotrader • Establishing brand relationship at a young audience. More likely to return when they are older.

Finding your audience

One of the benefits of digital strategy is the opportunity to segment activity into different spheres and places directly targeted to the location of the audience - or more specifically the personas matching the aims of the digital strategy. Targeting activities in this way can be used to reduce cost whilst increasing efficiency and message for each of the channels based in these locations.

Demographic segmentation location sourcing

From each of the personas defined it is possible to apply demographic filters to major locations where digital strategy activities can take place – e.g. social networking sites, blogs, search engines or forums. Often locations are applicable to multiple personas and demographics (e.g. Facebook, which is almost ubiquitous across western consumer audiences).



* Users per month - approximate Figures

By looking at the personas, locations suggest themselves. Most locations are happy to provide anonymous audience statistics to help promote digital marketing through their channels.

By segmenting personas across interests, niche locations can be identified. Depending upon fiscal return for each aim, targeting locations that contain small audience numbers and low barrier to entry can be a viable digital strategy leading to high returns. Location sourcing across interest involves a degree of research using either freely available tools (e.g. Google search), or paid for tools (e.g. Buzzwatcher from AT Internet).

Certain networks (e.g. Facebook, LinkedIn) provide a combination of demographic and interest segmentation that allows the development of highly personalised campaigns. Other tools, such as Phorm, have entered the market that also allow a great degree of segmentation, however these have yet to prove popular with audiences, who consider them to have a somewhat ‘big brother’ approach.

Location evaluation

To scope the remit of any creative, locations should be evaluated against audience size, barriers to entry and potential for conversion of the digital strategy aims. This will avoid the scenario where creative ideas are developed and rated for locations that will not benefit digital strategy. Locations can be evaluated in line with the following table:

Location	Audience Size	Barrier to Entry	Estimated Uptake	Aims Matched	Audiences
Location A	10,000	Low	Medium	A1, A2, A5, A6	A, B
Location B	1,500	Low	High	A2, A3	B
Location C	50,000	Medium	Medium	A4, A6	A
Location D	50,000	High	Low	A1, A2, A3, A5, A6	A, B

In the above example, although Location D matches most of the aims, it may prove more cost effective and provide better returns to concentrate efforts in locations A, B and C.

For example, location D may be the online business section of a national paper, and targeted display ads will hit most of the aims of the digital campaign. However, the cost to advertise (barrier to entry), is restrictive. The other locations may be social networking sites or, in the instance of location B, a niche targeted forum. When efforts are spread across three locations rather than just one, the cost barriers are greatly reduced.

Engaging the audience

Already highlighted in the approach to digital strategy is the shift away from monologue to dialogue, the movement into engaging directly with audiences. But what should you engage over, what is there to talk about? With all of the background information in planning, audience location and persona building, in theory it should be a relatively simple task. In practice, however, it is normally far tougher.

Before any ideas can be created, thought needs to be given to how to best maximise engagement across each channel. This falls into two specific considerations:

- the style of the audience within the channel
- the style of the message and aims that need to be delivered through the channel

To a large degree, the first starts to frame the second - but not entirely. Whether business to business or business to consumer, the way we engage with others is multi-faceted, and there is room to mix the message a little and still achieve success.

Research

The easiest step to take in planning how to talk to the audience is to conduct research; how do they currently speak in each of the locations? e.g.:

- Tone, phrase and linguistics
- What has previously got them talking and where does that align with the digital strategy?
- What are competitors doing successfully, and what does not appear to be working?

In addition, some research across potential key influencers would highlight common user generated content patterns, e.g.:

- How personal is the communication between the members of the audience?
- How much do they share (how influential could they be for your campaign)?
- What is the common level of engagement?

The common goal of the research is to identify what messages have been considered to have worth through each of the locations, and how do audiences communicate that?

Social styles – Merrill and Reid

Psychologists Merrill and Reid defined a measurement to quantify how people best communicate with their definition of social styles. Built across the axis of assertiveness and responsiveness, the four precepts of social styles and how they group people are:

	Task		
Ask	Analytical Cool, independent Guarded Disciplined about time Measured opinions and actions Use facts	Driver Risk taker Strong opinions Takes social initiative Makes statements	Tell
	Amiable Supportive Lets others take social initiative Moderate opinions Go along attitude Risk avoider	Expressive Warm, approachable Emotional decision making Communicative Dramatic opinions and actions Easy to get to know	
	Emotion		

Audiences fall across different groups which are mediated by persona and by the channels they are using, time of the message / action that is being performed and the experience with the campaign. What is clear from studies by Merrill and Reid is that people tend to engage better within their mix of social styles, and work with those directly adjacent (e.g. ‘amiable’ works with ‘expressive’); however, diagonal competing styles stifle engagement through lack of empathy (e.g. ‘amiable’ is likely to clash with ‘driver’).

To achieve aims across the digital strategy, it is likely that people will be involved in each of the four social styles. However, it is exceptionally difficult to engage each of these styles through a single channel and any attempt to do so is likely to result in a mishmash of competing styles that confuse the audience. As each audience member becomes more familiar with the campaign, there will be additional leniency as to what is on and off message (provided that the core message remains). However, competing styles (especially those at the diagonal) will either need to come through different channels or through influencers within a community of practice.

Communication

Potential message routes and styles of communication can be brought together to provide a reference framework for the creation of ideas and message, and how they tie back to the aim:

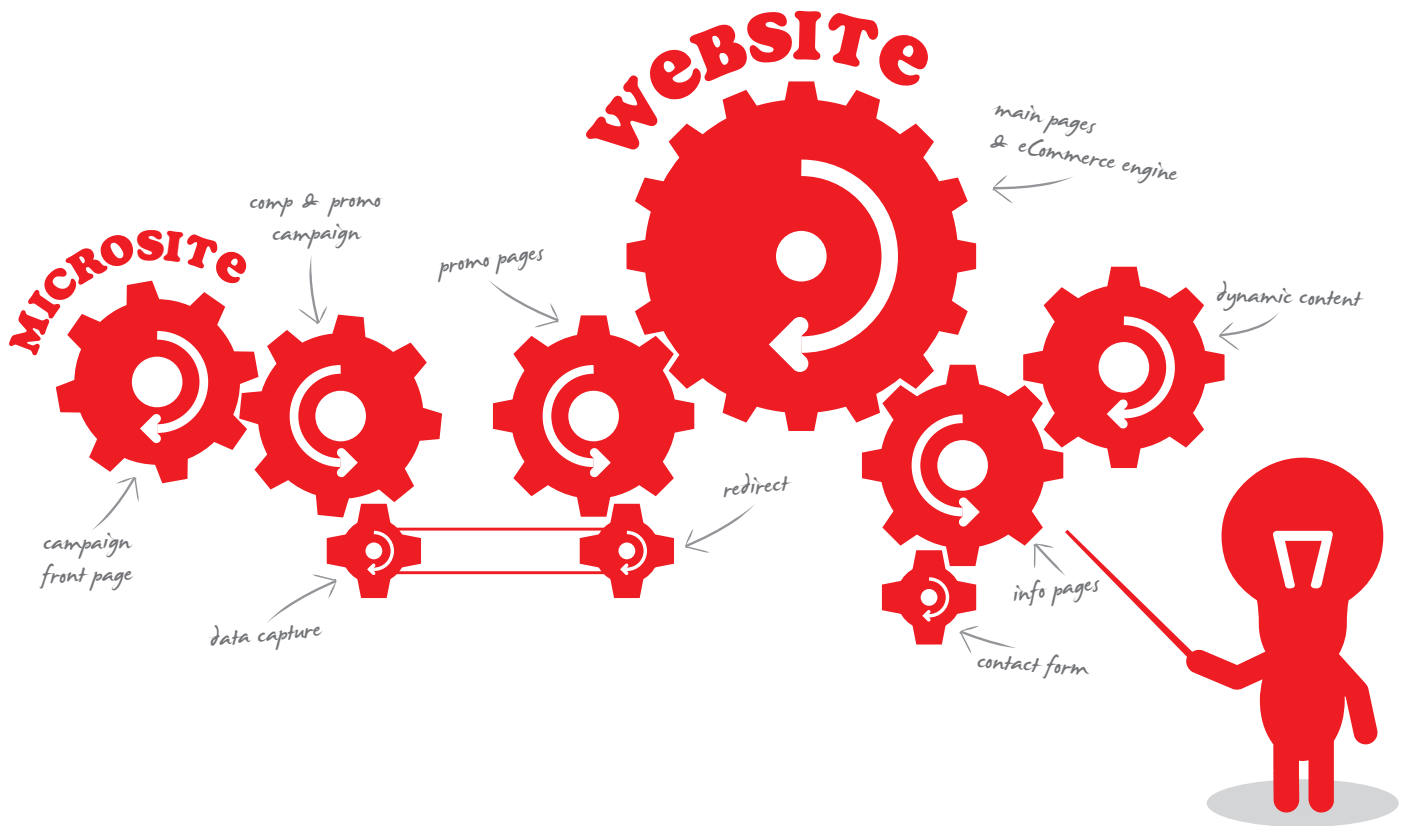
Aim	Community	Persona	Locations	Social Style
Increase Brand Awareness	Student interest communities. For example Student Unions, Student Voucher Pages, Student Bars & NUS pages	First time car buyers. Low disposable income, 18 – 24, Still living at home. Uses Social Networking sites	Facebook fan pages, groups and Ads. Twitter Student Twibes, groups and lists. You Tube	Trend-setter and risk taker, with strong opinions and statements. Young and open

Planning conclusion

At the end of the planning stage of a digital strategy, all concerned should be clear about:

- The desired aims of the digital strategy
- The audiences each of the aims are targeted at in order to achieve the best results
- Where to find each of the audiences to achieve the goals
- Best communication methods of engaging with the audience

This allows all creativity to be focused directly on achieving the best returns across the digital strategy.



Stage 2:
Creation

Ideas

Ideas, creation and creativity are the elements of digital strategy that get the most attention. The temptation is to always start at the point of creation and to neglect the planning phase. As long as there is an implicit understanding of a brand, not all ideas that are derived without suitable planning will be poor. However, the general product will be poorer for not having that rounded understanding.

This paper segments creation into two specific areas - ideas and the evaluation of ideas, and building those ideas and the factors that should be considered. The melting pot that is idea creation is crucial to digital strategy:

- if an idea doesn't engage the audience, the strategy will underperform or fail
- if an idea requires too much maintenance, channels of engagement will clog and the strategy will underperform or fail
- if an idea is too removed from the aims or audience, the strategy will underperform or fail

Evaluation of ideas (from both an engagement and a fiscal perspective) through formalised methods helps to mitigate the risk of "bad" ideas and stop them entering into the strategy. However, in essence few focused ideas are truly bad - what makes a "bad" idea for one campaign might work for a subsequent campaign.

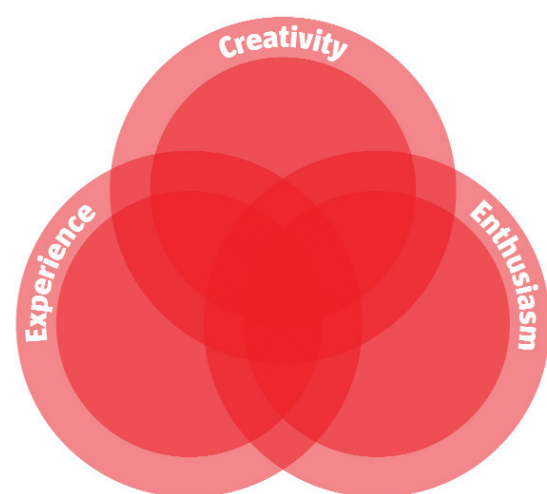
As a subject, building ideas could form a whitepaper all of its own, for each of the different disciplines involved within the channels of a campaign and strategy. It is not practical to evaluate all the differing requirements of a potential build here, but this paper gives an overview of broad brush areas that should be considered.

Brainstorm

There is no single way to run the perfect brainstorming session; the combination of the people involved, company culture and the aims of the digital strategy will make certain approaches more productive than others. The following are a few suggestions on how to get the most out of brainstorming sessions:

Nominate a chair

Nominate one person to collate all participants, to run the meeting and to circulate resultant ideas from the brainstorming session.



Get the right mix of people

Participants from similar backgrounds will come up with similar ideas and result in a stifled brainstorming session and limited creativity. Also, the balance of participant characters helps; they should have the correct mix of experience, creativity and enthusiasm to pitch their ideas.

Brainstorming groups should be between five and seven people: fewer than five and the number of ideas will be limited; more than seven and the sessions are likely to be unwieldy.

Preparation is king

Pass all materials out before the brainstorming session and inform participants that they are expected to enter into the joint session with ideas. Isolated brainstorming sessions have been shown to contribute some of the best initial ideas, but running both isolated and joint brainstorming sessions can allow these ideas to be nurtured.

Set out the rules

All participants should be given the chance to contribute to the session (hence the prior preparation). Participants should be actively encouraged to announce ideas as they have them. The purpose of the brainstorming session is quantity not quality; piggybacking off of others' ideas to combine or extend should be encouraged (whilst still allowing everyone to participate).

No criticism

During the ideas gathering stage there are no such things as bad ideas. Criticism encourages participants to retreat from ideas and stifles creativity.

Note all ideas down

Ideas should be recorded, ideally to a flipchart or whiteboard. This will allow all ideas to be reviewed by all participants. This also shows the ideas route, how they evolved and upon review may result in further combinations and extension of ideas.

Once all ideas have been generated, each should be evaluated in terms of brief pros and cons, costs and benefits, feasibility etc. These will determine which ideas are pushed for a formal evaluation against both the merits of the idea and the aims of the digital strategy in terms of engagement and cost.

Locations and areas for ideas

By the time this paper is released the locations and areas for ideas will already be out of date, given the shifting nature of technology and new opportunities that are open for digital strategy. The following graphic will hopefully inspire some ideas that can be tailored to other digital strategies.



Engagement evaluation

There are two parts to the evaluation of any idea to determine whether it should be proposed as a channel for use in a digital strategy. The most obvious is fiscal feasibility, based upon cost and expected return; but it is also important to remember the engagement evaluation.

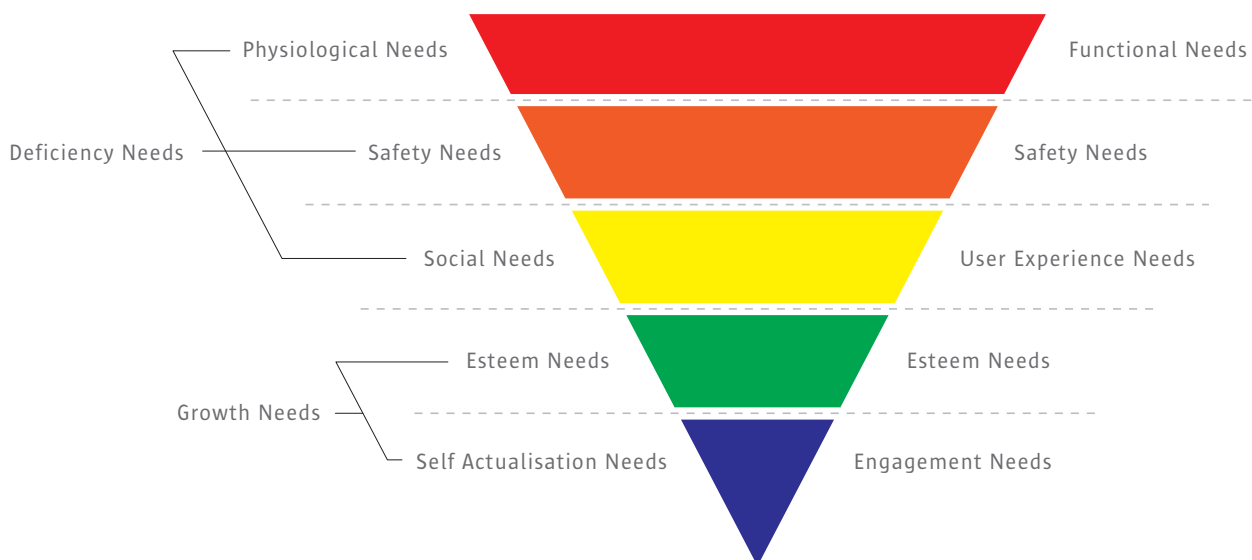
To build a digital strategy there are often multiple composite ideas that form a distinct channel (user journey). Each of these ideas needs to be rated as follows:

- How does the idea match the needs of the audience?
- Which audience groups does the idea touch upon?
- Where do the ideas sit on the engagement path?
- How do the ideas interconnect (if required) to route the audience through to the final step of the engagement path?

The value of the ideas themselves and a coherent picture of how users move through different ideas in a channel can then be evaluated.

Transposing Maslow's needs hierarchy

From his work as a clinical psychologist, Abraham Maslow devised a model for explaining the essential needs for healthy psychological development. Maslow's hierarchy of needs is used in building motivational routes by a number of different disciplines.



Maslow's needs hierarchy can be translated into digital terms to rate the engagement of each idea from the brainstorming session. Each particular idea may only reach a certain level within the hierarchy of needs when based against the audience requirement.

Deficiency needs

Deficiency needs are those that must be satisfied to ensure the idea's (or individual's) existence and security. Unless the idea comprises a very small part of a channel, the deficiency needs must be met for the idea to be even moderately successful.

Physiological / functional needs

Physiological needs are elements such as food, water and air - the most basic of all needs for a human to survive. These have their corresponding needs when evaluating ideas - do they meet the aims or part of the aims of the digital strategy? If these functional needs are unsatisfied, an individual's actions will be dominated by attempts to fulfil them, opening up a second set of needs or more often than not causing the individual to move on.

An example of a functional need would be having the ability to browse a site created for the campaign, the speed of the site, compatibility with the user’s computer or just plain whether it actually works!

Safety needs

In Maslow’s hierarchy, these needs relate to obtaining a secure environment in which an individual is free from threats. When transposing these into digital ideas there is a direct parallel in security, but there is also the factor of the barriers to entry to consider. Does the idea make the audience jump through a number of hoops and assumptions before getting to the value?

These digital safety needs are most often unmet when the idea is closely aligned to internal brand perception as opposed to the audience.

Social / user experience needs

Social needs cover friendship and interaction within the physical world. In the digital world these are mirrored initially by user experience, rather than the more obvious parallel of social media networks. This is due to the role of digital and the expectation of the audience. Otherwise, to hit these criteria every idea would have to be deployed through a social media network. The interaction here is between the audience and the idea.

Growth needs

For Maslow, growth needs are concerned with personal development and realisation of an individual’s potential. Within the digital strategy sphere, the individual is replaced with the aims of the digital strategy and audience progression and / or evolution to these aims.

Esteem needs

Within Maslow, esteem needs include the desire for achievement, prestige, recognition as well as appreciation and attention from others. Digital ideas can be rated against these (consider the games and quizzes on Facebook) to see what value a member of the audience receives from the effort they will be expected to put in.

Self-actualisation / engagement needs

This is the ultimate goal - the achievement of complete satisfaction by an individual successfully fulfilling their potential. In digital terms, these are essentially ideas without barriers that allow the audience to move from being inactive participants to influencers, advocates and, physiologically, partners in pushing the digital strategy’s aims.

Engagement path



The engagement path shows the steps along the audience’s interaction with a digital strategy. The ultimate aim of a digital strategy should be to move the audience through each step within the engagement path to achieve the stated goals of the digital strategy.

Awareness

The initial steps involve the audience being aware of the brand and one or more elements of the campaign. A specific idea could be solely focused on stimulating awareness of other elements of the digital strategy, e.g. a PPC advert linking to a microsite.

Evaluation

Evaluation is the equivalent of dipping a toe in the water. This may involve limited exposure to a further reaching idea, a light weight approach to a deeper idea using progressive disclosure or potentially a walkthrough of a more advanced idea. The evaluation step encourages the audience to move through to the next stage in the engagement path without setting up the barrier to commit.

Use

To achieve the aims of the digital strategy, at some point the audience will be expected to use one of the tools within the campaign, hopefully repetitively. Use should not raise the barrier of conversion, e.g. the user being forced to expend excessive time and/or money.

Conversion

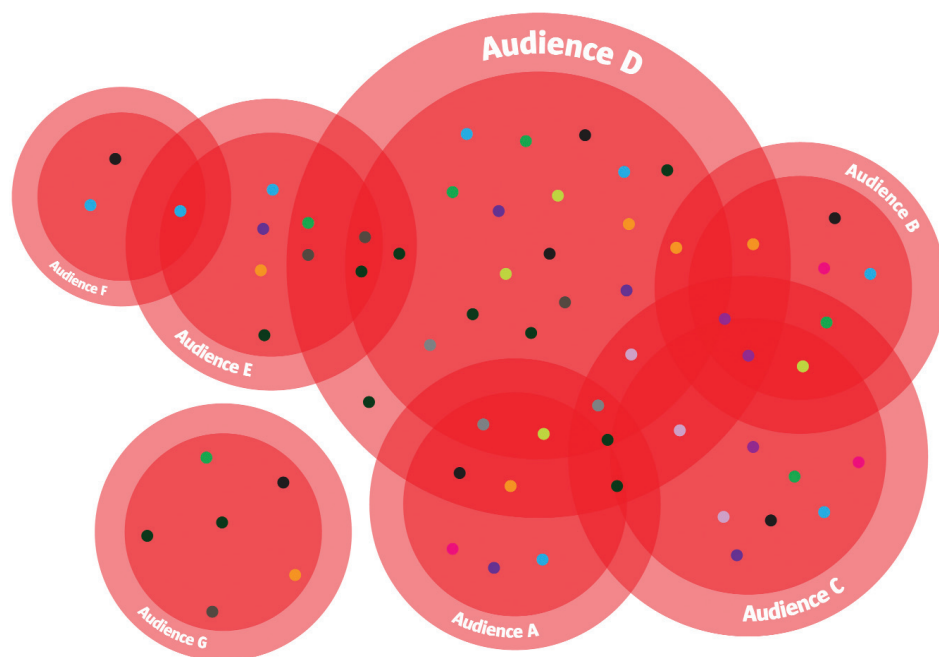
An idea that reaches the conversion stage of the engagement path will be meeting the short term aims of the digital strategy, e.g. making a single purchase through a site.

Engagement

Engagement involves entering into long term dialogue with the audience over an idea. Ideas that reach the engagement stage can result in repeat conversion and the transition of the audience from being inactive participants to active advocates.

Idea and digital channel touch points

For each idea there will be a digital channel through which it will be delivered. Not all ideas and channels will touch upon all audiences, and some audiences may be reached by multiple touch points. For a digital strategy to work, however, each audience must have a touch point within reach.

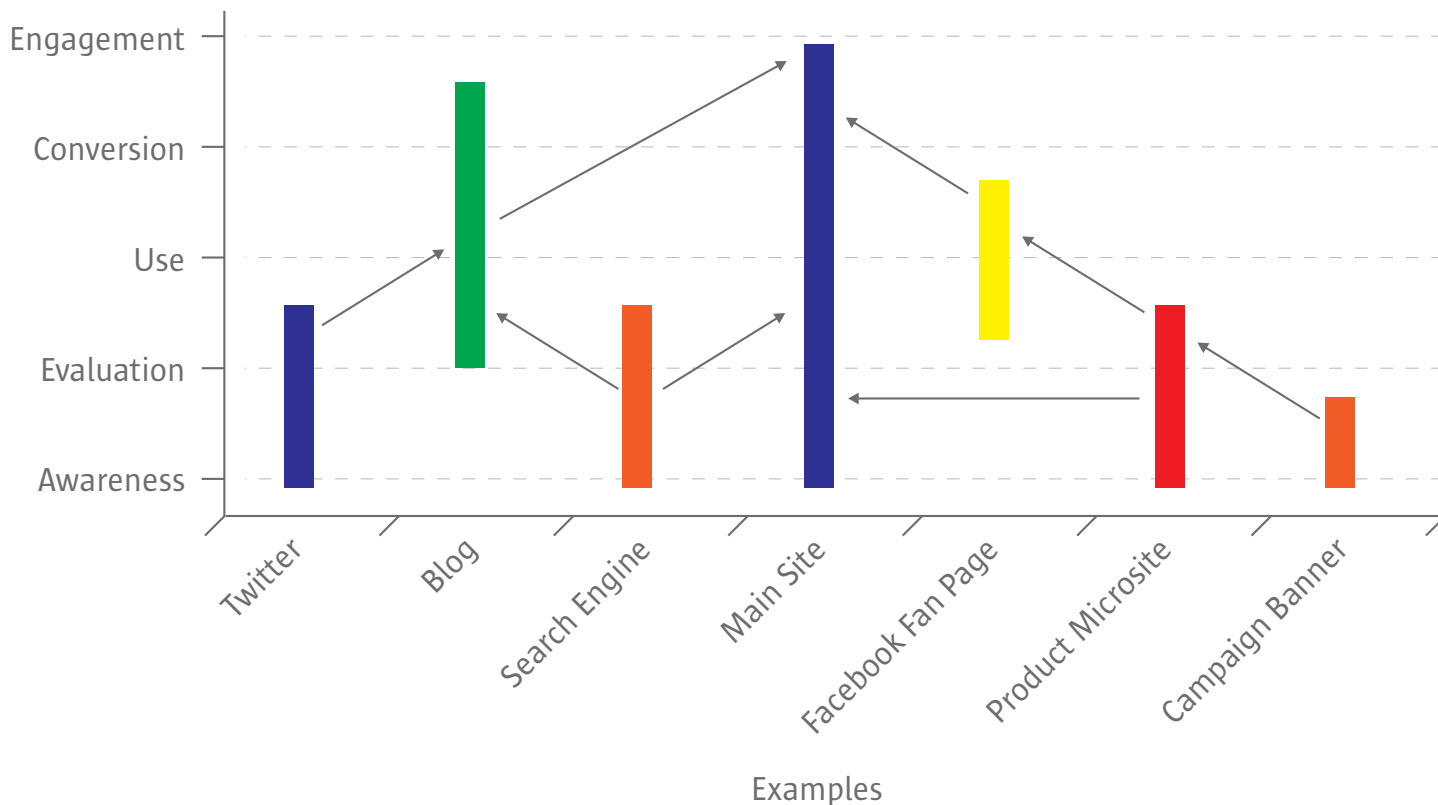


Location Examples

- TV – National and Regional
- Radio – National and Regional
- Press – National and Regional
- Magazines – Targeted Titles
- Point of Sale – Instore
- Experiential – Events/Shows
- Exhibitions – Targeted Titles
- Mobile
- Display Advertising
- Search (Google)
- Twitter
- Forum/Blogs
- Email
- Social (Facebook/MySpace/Bebo)
- Video (YouTube)

Engagement evaluation

With ideas rated across a digital transposition of Maslow’s needs, their route along the engagement path and their touch points to audience segments established, the following chart can be created:



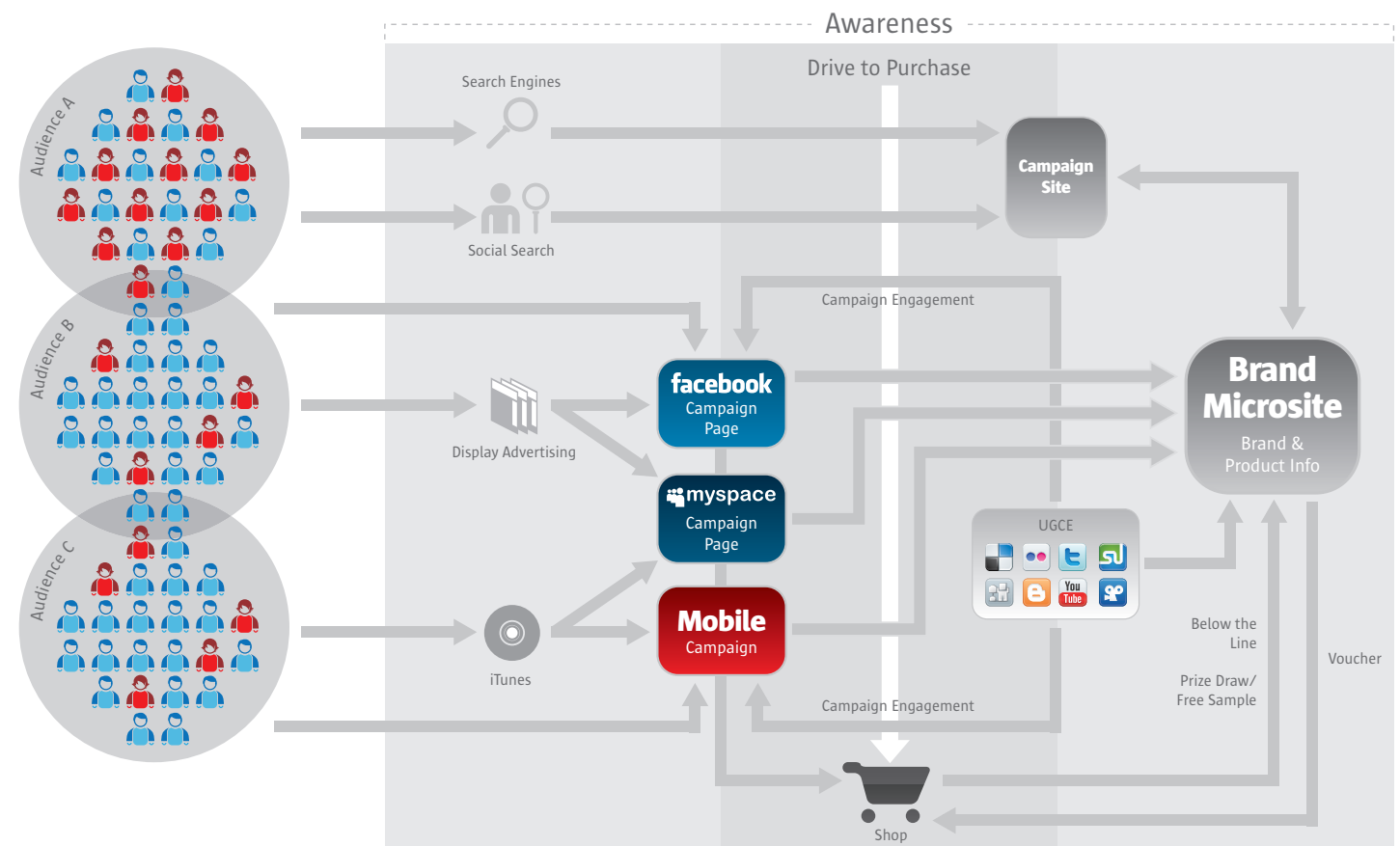
For each idea, this chart shows:

- The highest level attained within the Maslow evaluation (through colour)
- The steps along the engagement path that idea achieves
- The route a member of the audience might take between ideas to move to the final stages of the engagement path

Channel Approaches

Whilst each digital strategy is unique, the first edition of this paper highlighted that some of the concepts and some of the ideas raised were somewhat difficult to follow without example. The following are three small examples of channels of ideas being put together using different tactics to achieve different end goals. Each of these form just a small part of a digital strategy, but should help clarify the concept of a channel and some of the tactics that could be employed.

The UGC loop

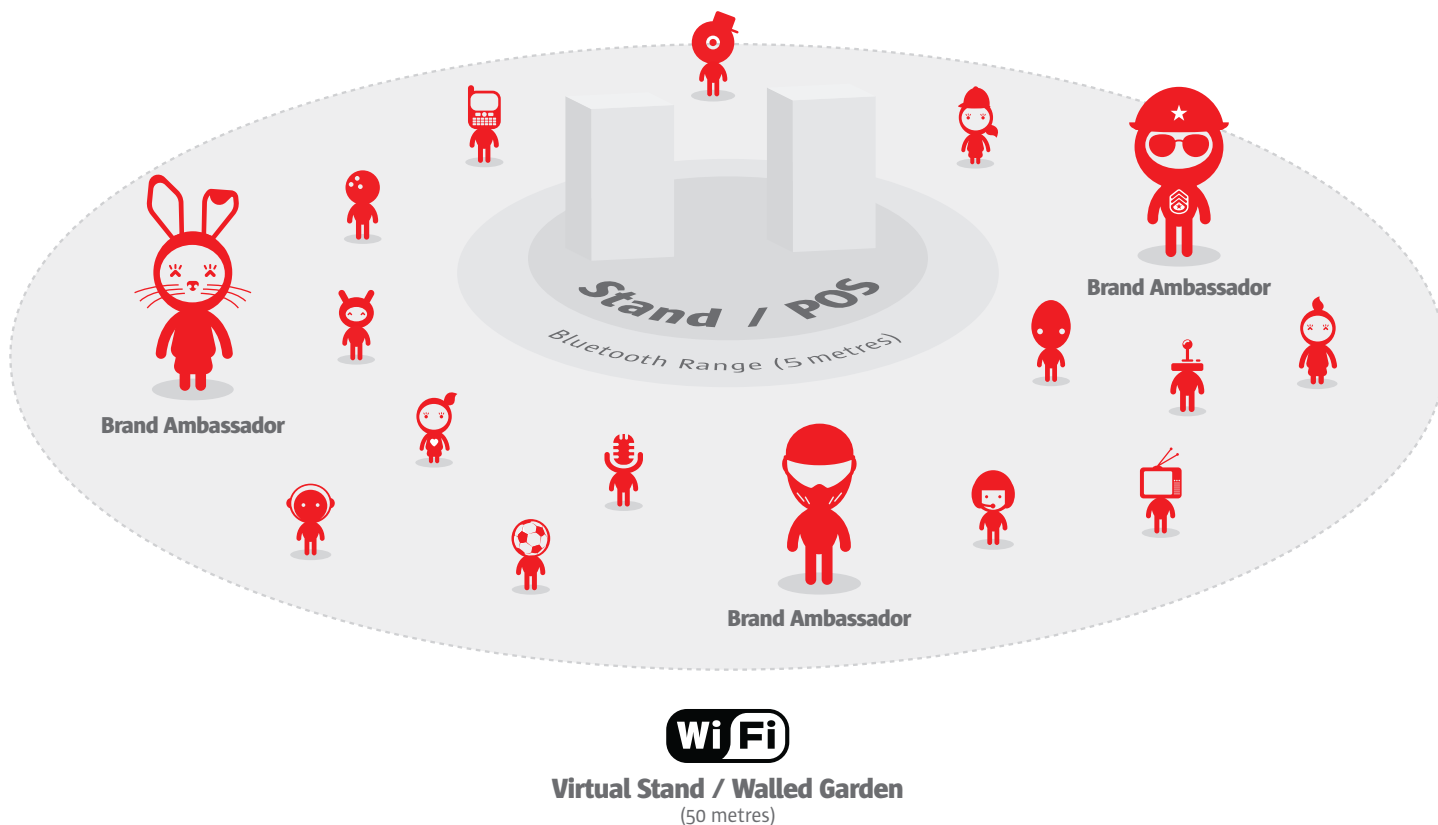


The User Generated Content (UGC) loop starts with initial seeding to drive initial awareness and subsequently uses user generated content to perpetuate the campaign. Normally tied with a below the line promotion, or self actualising / ego driven competitive element to encourage the audience to participate and become part of the awareness drive of the campaign.

Focusing on the initial locations, Facebook helps UGC perpetuation of a campaign by pushing updates, tools and application messages onto the news feeds of connected friends. This has, of course, extended through Facebook social plugins from the confines of Facebook pages to external websites.

The microsite in this model becomes the focus of the campaign with the social reach used as an extension of awareness, like a spider at the centre of its web. Dependent on the length of the campaign the microsite may achieve independent awareness through search engines, but over short campaigns social traffic and seeding is likely to be the direct driver.

The digital experiential



Digital does not have to be limited to websites, mobile app or social media channels. The above example uses digital as an aid to an experiential campaign with brand stand and brand ambassadors. Through use of open wireless networks that brand ambassadors and the public can connect to with mobile devices, the stand and experience are projected over a far wider area. The interaction and engagement would be dependent upon the experience the brand is trying to convey, however, the following have been used:

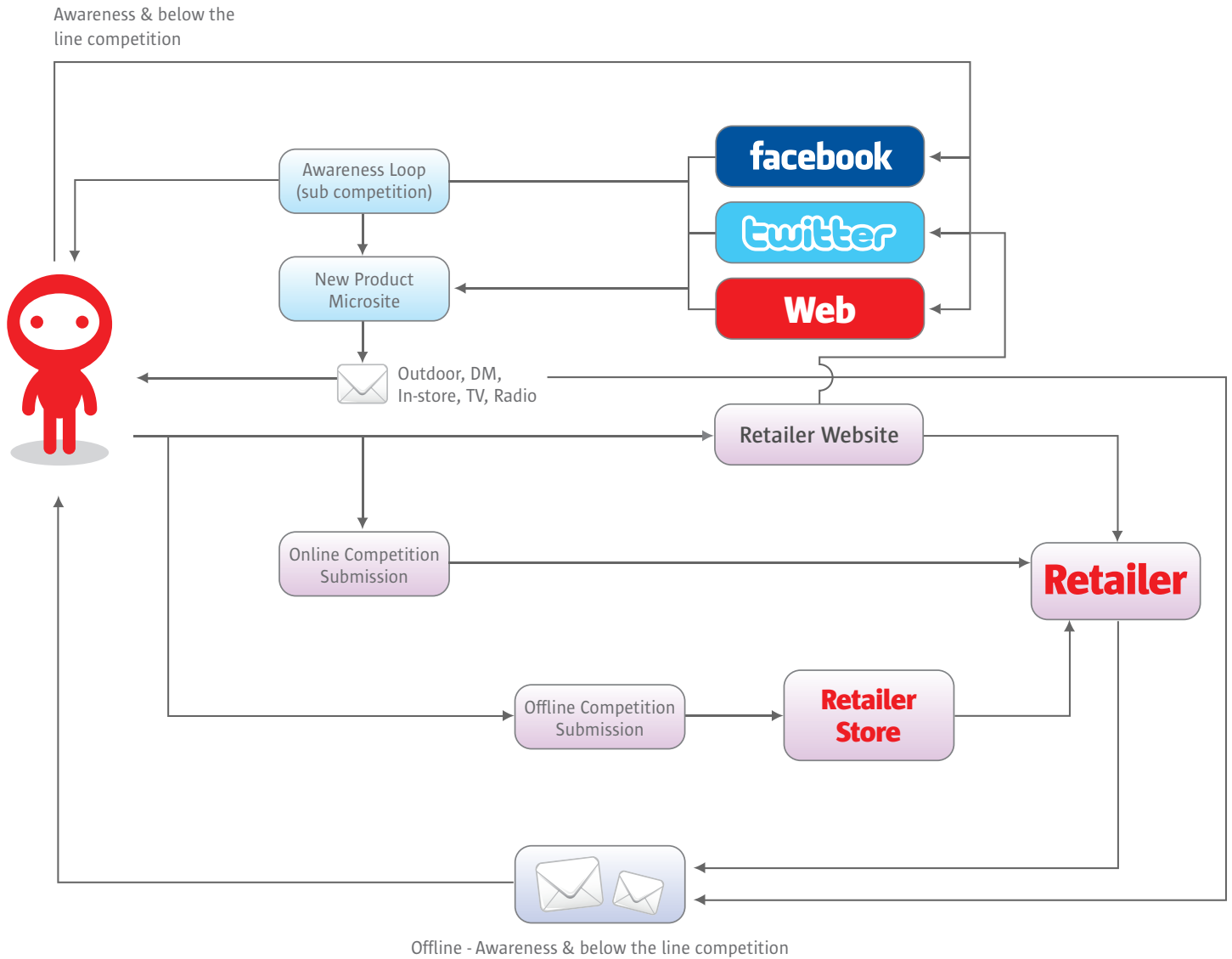
- Walled gardens of mobile website content
- Video interactions including augmented reality (both to on-stand screens and to mobile devices)
- Real time games and interactions with the audience in the area of coverage
- Download of assets for later consumption by the audience
- Data captured on iPad / tablet machines

Extending the mobile aspect further by using targeted SMS push and / or geo-location social media services (e.g. Foursquare) helps to build awareness and target audience groups that are more likely to engage.

The benefit of bringing digital into experiential is that of extending the experience. An audience can be seeded before the event, live interactions can be recorded at the event and through unlocking captured assets over time, the audience can be communicated with after the event. The 5 to 10 minutes of engagement that the brand might usually have is extended over a period of weeks.

A simple version of this model was used by Red Ant at Internet World 2010; purposefully run without any form of awareness campaign, engagement with the target audience ran to 18%.

The online and offline - below the line



Digital strategy does not have to focus purely on digital devices and on digital feedback. In many instances there is a direct requirement in the aims, or good reason from the background to the strategy to work from an offline first step, and potentially deliver direct offline aims.

This model uses both an initial seed from an offline promotion and in store conversion allowing the entire campaign, from an audience perspective, to be conducted offline should they so choose. The DM affords the opportunity to push the digital touch points for the brand and campaign to drive awareness so that in the future the audience can be engaged with through digital, which will reduce costs.

Fiscal evaluation

The second part of ideas evaluation is fiscal; ideas which are obviously unfeasible that are outside of the available budget should have been weeded out before this stage. However, each idea should be rated against cost (both build and maintenance), and estimated return in both fiscal value and worth balanced against the aims.

Build cost

The build cost of any idea is perhaps the easiest step for digital agencies to assess, and depending upon the level of engagement, potentially the most expensive. With digital asset building it is important to remember that most digital assets can be reused across multiple members of the audience and can be re-skinned to potentially run across multiple audiences.

Example

Idea	Build Cost
Idea A	10 days
Idea B	5 days
Idea C	15 days

Maintenance cost

The maintenance time per week for each idea should be estimated and factored into the costs. Not all ideas will automatically incur a standard maintenance cost; some may not change during the digital campaign, others may have a fixed cost. The following is an overview of the equation used for calculating the estimated time for each engagement focused idea:

$$\text{Proactive Engagement} + (\text{Audience Involvement} * \text{Reactive Engagement})$$

Proactive engagement

Proactive engagement is tied to the amount of seeding each week for a given idea, calculated using the simple formula:

$$\text{Number of Seeding Posts} * \text{Time for Each Seeding Posting}$$

Audience involvement

Audience involvement seeks to calculate the percentage of the audience population that is likely to be active in any given week and the level of involvement that each different audience persona is likely to need for each idea. This can be calculated using the following simple formula:

$$\text{Audience Size} * \text{Percentage of Audience Active} * \text{Involvement}$$

An involvement factor of 100% would be deemed typical; audiences requiring extra help would be rated at more than 100%, audiences that are self managing to a degree would be rated less than 100%.

Reactive engagement

The reactive engagement should be calculated for one active audience member over the period of one week, and the audience involvement factor will adjust accordingly for the size and persona of the audience. Weekly reactive engagement can be calculated:

$$\text{(Weekly posts * Moderation Factor) + (Weekly posts * Response Rate * Response Time)}$$

- The weekly posts are the number of posts made by an active member of the audience through the idea
- The moderation factor is the percentage of posts that will require attention for moderation by whoever is maintaining the idea
- Since not all posts will require a response, this is handled by the percentage of posts requiring a response in the response rate
- Response time is how long it takes to handle a single standard request through the idea

Fiscal value and worth

A digital strategy will consist of a number of aims that should, at this stage, already be aligned with one or more ideas. How each idea tackles each aim can be further subdivided into a number of key performance indicators using the following:

- Estimated audience size per idea
- Expected success rate as suggested by the engagement evaluation
- Estimated average return per conversion

A picture can be built up to look at the expected fiscal values that are being generated by each idea. The worth of the idea is also an important factor in the fiscal evaluation. Value deals purely in terms of bottom line returns either through purchases, savings or lead generation. The aims of a digital strategy are often unequal when aligned to brand strategy, and worth repositions the idea against how well it matches the digital strategy aims.

KPIs

Key performance indicators are the metrics by which ROI and performance can start to be estimated and eventually measured.

- Page views
- Actions completed
- Visitors
- Total purchases

The resultant returns are not yet rated into worth or value; they are the points at which fixed numbers are estimated. Against each return (tangible or non-tangible), a fixed measure of when that return is to be achieved has to be specified.

Tangible idea returns

The easiest returns to measure are tangible website returns. These have a direct measurement against normal website metrics.

Examples of these would be:

- Sales through the site
- Audience downloading application
- Leads generated through contact forms
- Audience forwarding viral videos

Each of these actions can be given a simple estimate value for each idea, to be mapped directly into the aims of the digital strategy.

Non-tangible idea returns

Non-tangible returns are somewhat harder to derive, since these have a layer of analysis over and above direct measurement.

Examples of these would be:

- Brand awareness
- Presence
- Reputation / impression
- Education

Each of these may map directly against an expressed aim, but they are not directly measurable. To assess the return on these, simple metrics (visitors, repeat visitors, people browsing certain sections of the site) can be used to calculate where these benefits will be achieved.

Worth

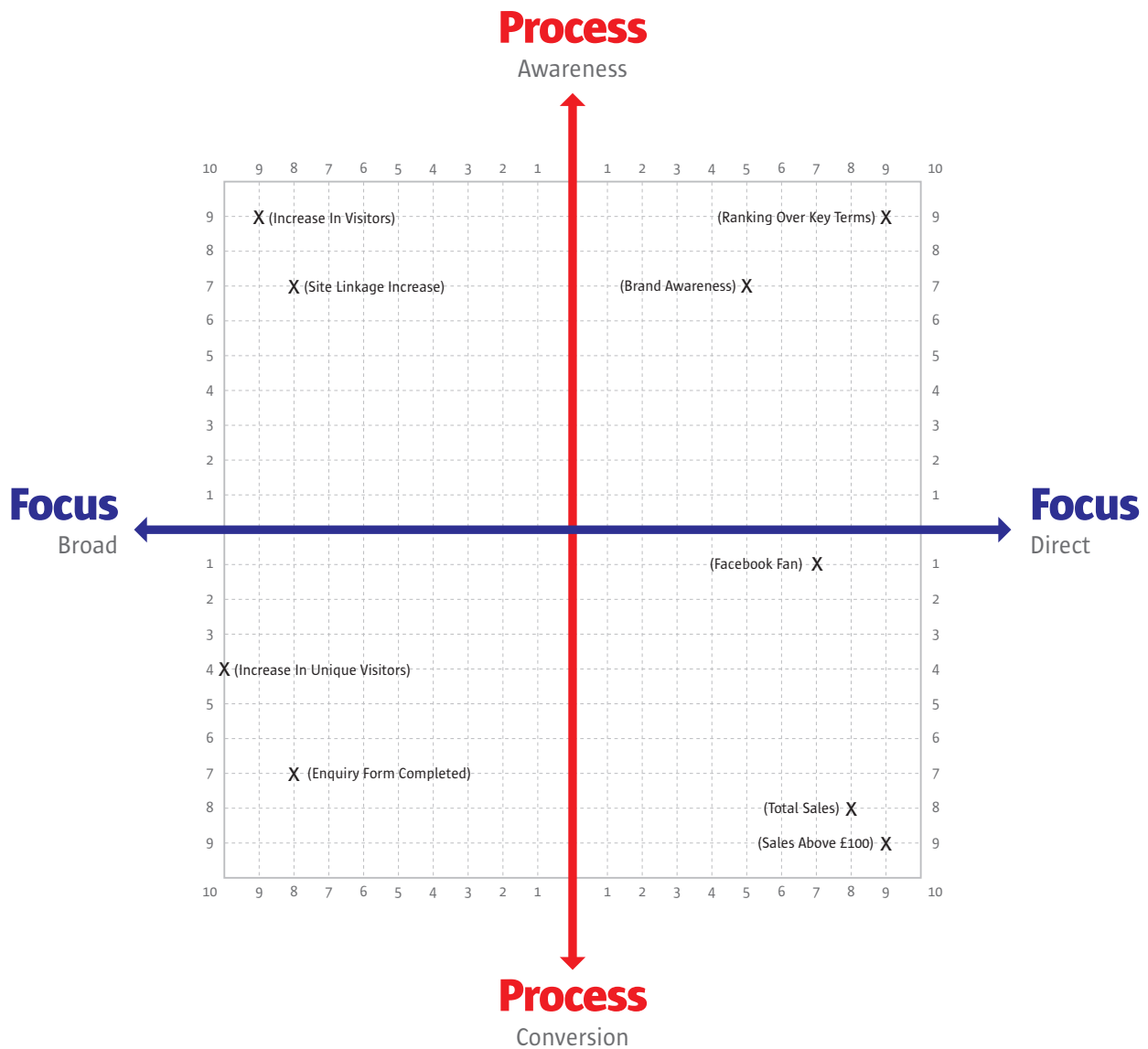
Areas of worth

All aspects of worth for an idea have to be tied into digital strategy aims. Returns should be placed into a rating structure similar to the rating of aims, placing them across Process (Awareness to Conversion), and Focus (Broad to Direct).

Worth map

To create a worth map, the following steps should be taken:

- Each area of worth should be rated 1 to 10 in order of importance (1 = Trivial, 10 = Critical). The rating of these should be aligned to grouping within the aims of the digital strategy
- Each return should be rated 1 to 10 in order of importance (1 = Trivial, 10 = Critical)
- The area rating should be multiplied by the return rating to establish a measure of worth
- Worth can then be mapped on a graph. The Y axis would be Awareness to Conversion. The X axis would be Broad to Direct.



Estimating performance

The estimated performance of an idea is split into the fiscal value of returns and the performance of the return. These should be documented in tabular form to allow quick reporting over reporting periods.

Establishing fiscal value

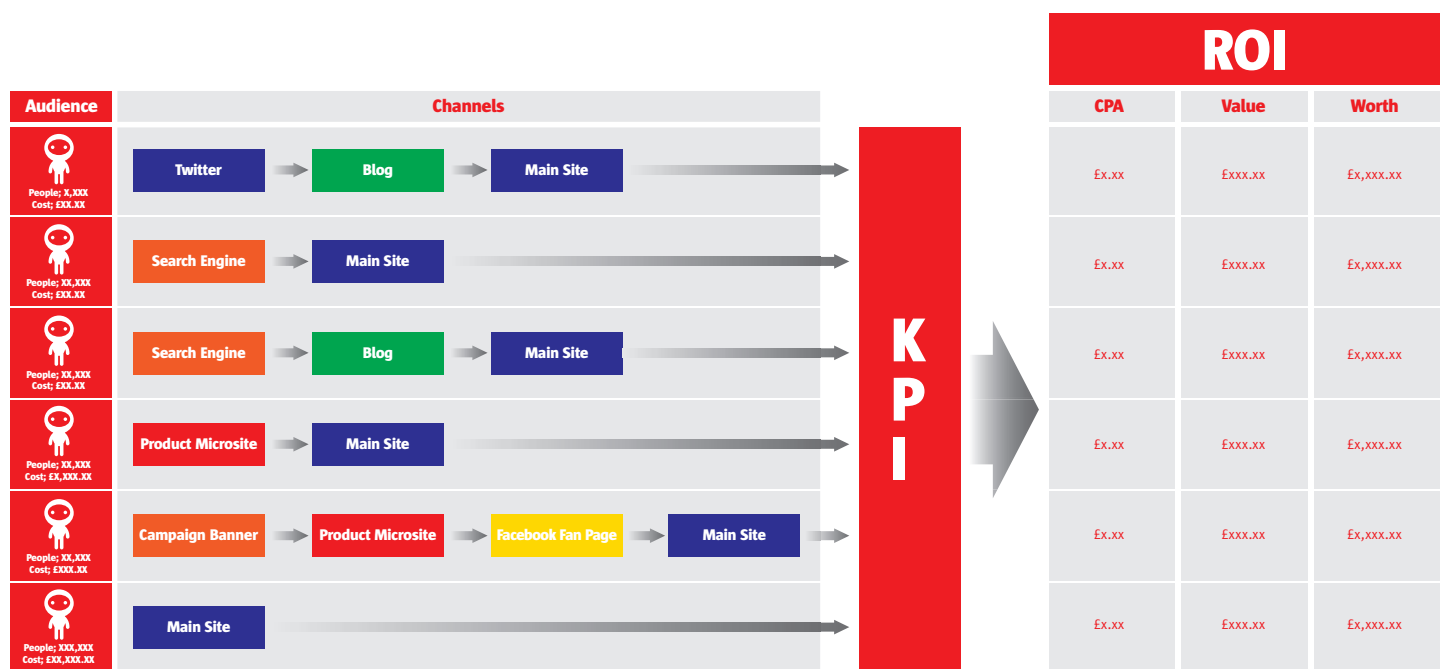
It is easy to oversimplify certain areas of fiscal value reporting. In direct ecommerce, it is tempting to measure performance on total transaction values, ignoring elements such as margin per transaction. It is also difficult to place a fiscal value on non-tangible returns.

For a simple framework, fiscal values can only be approximations. However, over the lifecycle of the digital strategy, ROI and performance framework fiscal values can be amended based on evidence to give better approximations. This would occur at the evaluation stage.

Fiscal values can either be fixed, or calculations based upon simple metrics, e.g.:

Return	Fiscal Value
Total Sales	20% average margin
Sales above £100	5% additional margin
Brand Awareness	1% given brand value for each 10,000 visitors over 100,000

To avoid counting the same value twice, each return and value should be aware of previous returns (e.g. if a visitor is worth 1p and a newsletter subscriber is worth 3p, since a newsletter subscriber is already a visitor the additional fiscal value of a newsletter subscriber is 2p). In addition, the maximum size of the audience population can only be taken from the population of the audience group at the awareness touch point, as shown in the chart below:



Establishing performance

Whilst value is a useful reporting and measuring tool, performance is perhaps more useful. Since performance can only be measured in the light of the digital strategy aims, it needs to factor in worth of each return from the worth map. Performance is calculated as:

$$\text{Performance} = (\text{Fiscal Value of the Return} * \text{Worth}) / \text{Mean Worth for all Returns}$$

For reporting, performance should be added as a column to the fiscal value table to allow both measurements to be seen side-by-side. The report should be structured as follows:

Return	Worth	Fiscal Value	Performance	Mean Worth
Total Sales	64	100,000	106,667	60
Sales above £100	81	10,000	13,500	60
Brand Awareness	35	10,000	5,833	60

Fiscal evaluation

With all of the factors for each idea in place for fiscal evaluation, the following table can be constructed to rate each idea fiscally to suggest if the idea should be developed. Maintenance, Value and Performance are rated across the duration of the core campaign. Where an idea runs across multiple KPI's, the worth (and subsequent performance) should be derived of the mean worth of each KPI. When a KPI is derived from multiple ideas, the value assigned to the KPI should be split as a percentage of the total success rate per idea divided by the total success rate of all ideas in that KPI.

Idea	Audience Size	Success Rate	Build Cost	Maintenance Cost	Estimated Value	Estimated Performance
Idea A	10,000	20% (2,000)	£5,000	£2,000	£10,000	£10,000
Idea B	50,000	20% (10,000)	£10,000	£5,000	£30,000	£25,000
Idea C	50,000	10% (5,000)	£10,000	£2,000	£15,000	£30,000
Idea D	1,500	80% (1,200)	£5,000	£0	£12,000	£20,000

Evaluating ideas

By now in the digital strategy process it should be apparent which ideas / channels to build for which audiences, to attain the best results. These need to be evaluated by all stakeholders to ensure agreement so that production time can be focused on delivering one set of agreed ideas.

Creation conclusion

Whilst the creation stage isn't truly finished until the systems are technically designed, built, tested and ready for deployment trying to cover the nuances of these next design and build steps is beyond the scope of this paper. However by the time the steps detailed in the creation section have been complete all concerned should be clear about:

- The areas that are required to be built
- The audience journey and the KPIs at each stage
- The planned return from each idea and channel
- The time required for building and maintaining each channel

With everyone clear about the channels that are to be built the next focus of strategy is the campaign actualisation.



Stage 3:

Actualisation

Planning engagement

Building the right team

Engagement is best planned and managed through teams; the team members themselves may be actively involved in managing communication flows with the audience, may be passively involved with additional brainstorming, developing campaign content or may just be in the role of governance (e.g. is the campaign going off track?). The number of people in the team will change dependent upon the digital strategy; however the following roles in activation need to be considered:

Overseeing

A core part of running the actualisation of a strategy is being able to take a step back from the work that is being undertaken to review progress against the aims, through each one of the tactics employed within the digital strategy. Being too close to a particular channel can lend it a bias that may skew the strategy.

Researching

The research role can be both active and passive. Where the research role is active, discrete tasks have been assigned to it. They may include ongoing location of key influencers within a particular social channel, for example; for this, time should be allocated in advance with set goals. Passive research could involve the wider team, providing a greater number of people with the aims of each of the channels and a set communication route so they can point out areas of interest, become early warning indicators for points of inflection and help drive the tactic along. It is not uncommon to have key advocates as passive researchers feeding back into the campaign.

Creating

Creation extends beyond the initial channel creation, but also the messages as they are delivered through the campaign. Whilst a certain degree of message creation can occur in advance, the trends and flows of a particular campaign would mean that these would need to be tailored rapidly.

Responding

It is impossible to pre-plan responses to the campaign and still engage at a personal level; templates can and should be prepared for common feedback, but to truly engage requires personal responses.

Reporting

Rapid movement in any campaign requires rapid reporting; each member of the team should be maintaining reports of their activities, with brief notes on trended successes and failures. The nature of these reports will be as ad-hoc as the channel they represent, but should share common traits:

- Brevity – reports should be able to be reviewed at a glance
- Daily – reporting periods should extent to a timeframe no longer than one day (perhaps shorter in rapidly moving campaigns)
- Trended – each report should be considered in the light of the previous report to show at a glance the trend of activity

Reports can be shared around the team to quickly pass on lessons learnt, but must be read and compiled by the overseeing role to provide a more structured response.

Actualisation is a microcosm of the entire digital strategy process, but with the changes restricted and the speed increased. The team that manages the actualisation of the project needs to be aware of the shifting nature of the audience and external influences on it, and be able to rapidly react to maximise any potential benefits.

Building an engagement timeline

The more a digital strategy is planned the easier it is to actualise, and it allows more time for thinking about engagement. It is possible, unfortunately, to plan too far ahead, and it is possible to damage a digital strategy by not responding to the fluxes and flows that occur naturally across actualisation. However, it is possible to build a flexible engagement timeline that allows messages across channels to be dropped in or pulled out as required.

Actions and messages on brand

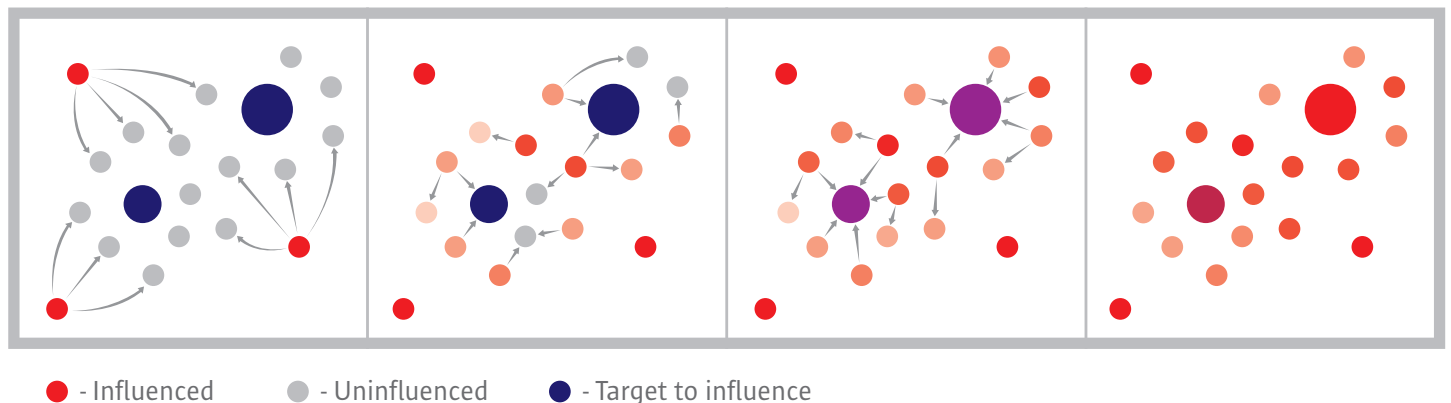
Within any campaign there will be triggers, whether they are actions or messages. Unless the proposition of the campaign or channel within a campaign is purely based around these, it is unlikely that too many of these will prove engaging with the audience. Within the planning section we touched upon style of message based around the studies by Merrill and Reid. The greater alignment to the social style of the audience these brand messages and actions have, the greater their adoption by the audience (and therefore conversion); also the frequency of these messages and actions and how tolerant the audience will be if they are not on social style will be determined by how lenient the audience is, based across previous worth. This has been put succinctly by social media strategist David Griner as:

“It’s hard to shake hands while you’re reaching for someone’s wallet.”

Engagement is not the same as direct selling, and actions and messages on brand need to be factored as such.

Building the message

Communities of practice were briefly discussed in the planning section - sometimes the easiest route to the persona delivering the most worth is not direct, but through intermediaries. Building the message has most effect across aims that promote awareness; these are most effective through communities (practice or otherwise), or interest groups.



Through a community based message we build alignment or co-alignment of brand to community. The message may not be the same, but has enough parallels to encourage a micro-trend within the community or, dependent upon how vocal the community is within the location, a wider trend.

Message building across an engagement timeline is one of the most useful and time efficient elements of engagement. Enlisting advocates across the targeted communities is important, as is empathy of the message to the community. However, once ingratiated into the community, the pre-planned message can become the bulk of day to day engagement and the campaign can build upon this as its foundation.

External events and worth

During any campaign there will be external events that will be of interest to the audience and communities that are being targeted by the campaign. These may not be entirely on message for brand, but are on message for the audiences that the brand wishes to engage with.

Through external events, the brand and the campaign can establish worth with the target audience. Engagement by its very definition is not one way - digital strategies should follow suit. Investing time and resources into an audience ensures that the audience has a greater likelihood of being receptive to brand and, in turn, investing time and resources into that brand. The worth to the audience is derived from the additional benefit (time, analysis and comment or access), delivered by the message (and subsequently the brand).

When selecting external events, it is important that the messages are not drowned out by the noise of the event itself. It is tempting to pick on a large event either inside or outside of an audience’s direct focus in an attempt to piggyback on the wave of interest. This normally leads to the message being drowned out by the noise of others, or the brand being perceived as subscribing to the “me too” meme which weakens the underlying digital strategy aims. It is important in such instances that the message being delivered is pertinent and has worth in the context of the event to attain focus.

Activity calendar

Bob’s Bangers Week 1: Commencing 13th September 2010

Red – Twitter
Blue – Facebook
Purple - (both channels)
Green – activity (non conversational)

The new Website is launched this week so it is important to talk about this across all of the networks. First round of Champions league group matches are starting so this can also be a talking point to get discussions started amongst followers. Bob’s new stock will also be uploaded so this can also be a discussion point later in the week. Important to seed the stockist as much as possible to get clicks up.

Character	Monday 14th	Tuesday 15th	Wednesday 16th	Thursday 17th	Friday 18th
		Launch of website	New Stock	Poll	Seed Website Deal of the week
Bob	Group, fan and follower outreach (T, F, B)	The New site has gone live - Lots of new features and reviews for you to enjoy! <URL to site> Looking forward to this week’s footy action! Check out the deal of the week section on our website for fantastic new offers! <URL to site>! Does anyone have any predictions for tonight’s game?	Post Article on low Insurance cars for first time buyers. Post a News Article e.g Jeremy Clarkson New Stock Has been uploaded! Take a look, you may find your dream car! <URL to site> Group, follower outreach Blog Outreach	What is your favourite car brand? visit our Facebook poll <URL to poll> What was your parents first car? Another poll we have going <URL to poll> Post Car News Article or RT someone	#ff bloggers of relevance Outreach to / Twitter/ Facebook community Hi Guys, Our deal of the week can be found here! Massive discount! <URL to site> Outreach Blogs & Twitter
Followers	0				
Feedback	0				

Bob

We will need to start by getting the message out there that the new website has been launched and is ready to be viewed. Outreaching to people on twitter and bloggers can help generate a buzz around the new site. Asking questions can also help get people talking

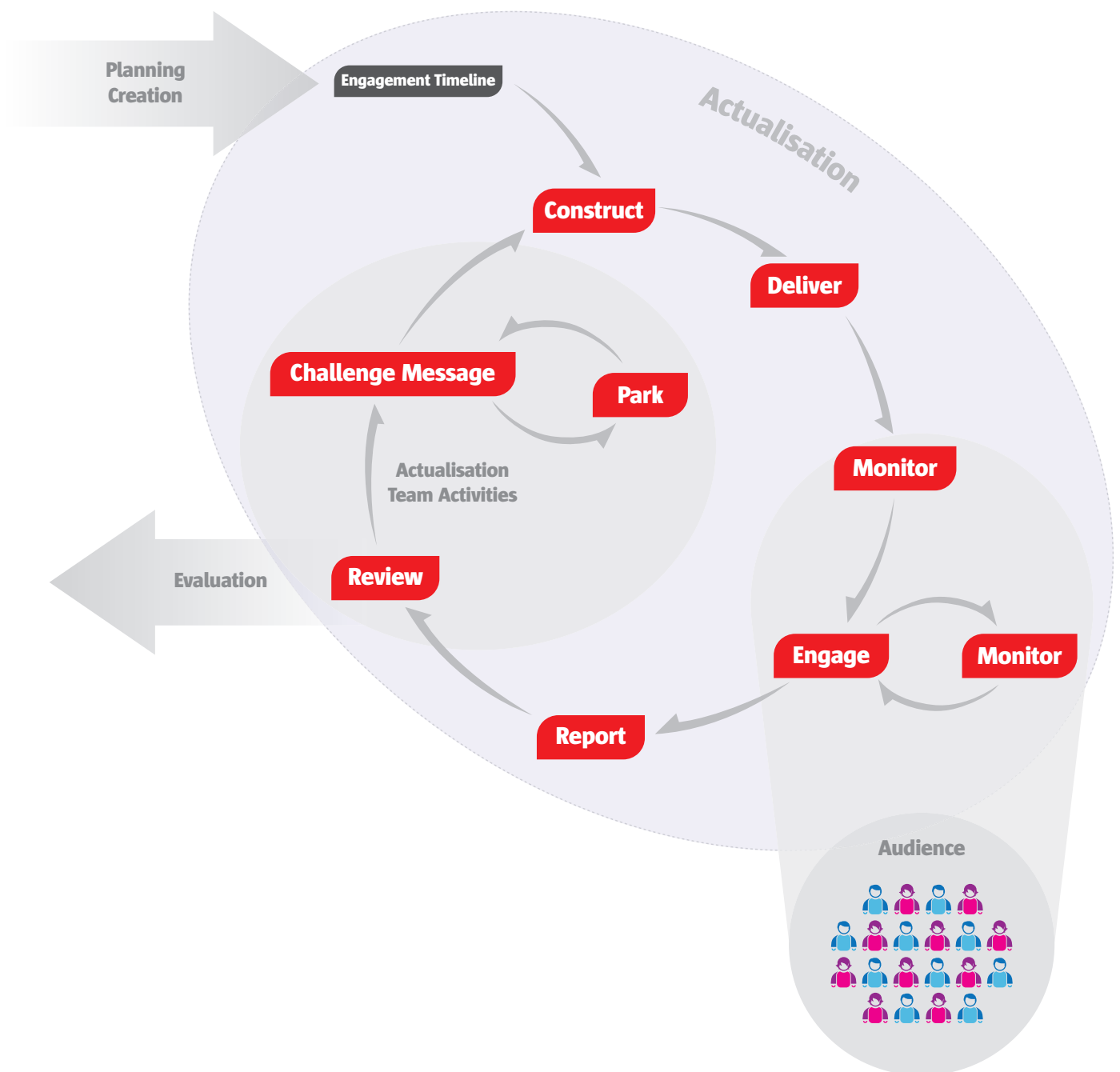
It’s important to keep on top of the real time trending topics on twitter so we should keep an eye on them. When we #Follow Friday people it gets the name out there as well

Engagement loops

Not all actualisation can be pre-planned; if everything were preset before the campaign the messages and actions that comprise engagement would be staid, miss out on audience alignment and the digital strategy would lack effectiveness. There is also the matter of response to consider - the brand entering into a dialogue with members of the audience to deliver both perceived and real worth.

As previously stated, actualisation is a microcosm of the digital strategy as a whole - the stages, the steps and the alterations in approach are also minor. In comparison, there is also the level of individual engagement to take into account. Whilst digital strategies run in circular lifecycles, communication of messages and action across actualisation runs through engagement loops.

The engagement loop



The engagement loop starts at its bedrock with the pre-planned engagement timeline. In each iteration the messages and plans made in the timeline will be delivered and challenged in controllable bursts of between a day and a week, dependent on the dynamic of the campaign. Each step in the engagement loop has a specific purpose to help break down audience engagement into manageable chunks - these are:

- Constructing the message
- Delivering the message
- Monitoring the responses to the message
- Engaging with those in the audience who responded and monitoring their future responses
- Reporting on message success
- Reviewing the message
- Challenging the message

Construct

For messages taken directly from the engagement timeline, the message or the building materials of the message should already exist and construction should be straightforward. If through running the campaign it becomes evident that a strand of the engagement timeline is not delivering results and not engaging with the audience, the plans need to go back to basics and work from what has been shown to be successful.

As actualisation is a microcosm of a digital strategy as a whole, construction combines, on a very small scale, the planning and creation elements. This can be distilled to the following questions:

- What goal am I trying to achieve and / or work towards?
- What has been working through the campaign in attaining this goal?
 - If success is limited against this goal, what has been working for the other goals for this audience?
- What hasn't been working through the campaign in attaining this goal?
- How can I tailor my message to reflect what has been working?

The end result is a small plan of action and the rudimentary parts of the next message in the campaign.

Deliver

The delivery of the message and its construction appear to be intertwined and therefore the distinction seems slightly superfluous. This is only true of simple, single channel campaigns. Where there are multiple channels to a campaign, messages are going to be delivered across each of them and the constructed message will require slight modification to fit the expectations of the audience and the limitations of the tactic within the channel.

Messages through channels are not just updates to text or tweets - they are as diverse as the tactics employed within a channel. At a top level these could be:

- Action of a character
- Sound
- Visual branding
- User experience
- Wording / tone of voice
- Clothing and appearance of a brand ambassador

As with all conversations, when we are trying to get someone to do something, the more we can align with and / or understand the mindset of the other party, the greater the chance that they will do it (convert). Messages within the engagement loop are a dialogue, or in some instances even a story. Delivery is intended to derive how the audience best reacts to the message and how they form their impression in the channel back to the brand.

An example of considering delivery would be a small experiment carried out by Red Ant to see how an audience similar to those of a campaign Red Ant were running, projected themselves when asked to consider a number of objects (brand and non-brand aligned). The aim was to look at different methods of linguistic delivery across the Twitter location. The results were split into four categories of connection:

- Attribute – something that is innate about the person responding or the object
- Action – something that someone is doing or will do
- Experience – a cross between the previous two, a classification based on previous experience of the object – think of previous service or established brand message
- Other – anything not listed above

Answers could sit in more than one category.

The scores across the four categories brought out the following trends:

- Attribute based connection was the most frequent with 70% of terms being some form of connection by attribute
- Experience was second with 30%
- Action came in at 6.7%

The population of the test audience wasn't large enough to form a solid platform of research; however, when the lessons learnt were then reflected in the delivery of the campaign, there was a 5% increase in conversion. The delivery step puts a pause in the distribution of the message and asks the question:

“Is this the right way to place my message within this channel?”

Monitor

From the earliest websites with their now rather kitsch visitor counters to the latest round of site and social analytics packages that attempt to define sentiment and meaning to the multitude of brand aligned audience messages, monitoring activity across a campaign is essential; so much so that it is implicit in the core principles of a digital strategy at the beginning of this paper:

- Digital can be reactive as well as proactive
- Digital should always prove returns

Without monitoring you cannot be reactive, and without monitoring you cannot prove returns.

Engage

Engagement is at the heart of the loop, as engagement is at the heart of digital strategy. When audiences are engaged they react with the brand, build against the goals of the digital strategy and ultimately deliver the value of the campaign. Engagement can either be with an audience or an individual - for those campaigns with enough time allocated for reaction, personalised engagement can build long term brand loyalty (as ASOS have proven with their support through Twitter channels).

Monitoring and engagement run hand in hand in a small sub-loop. It is important to react in a timely fashion and in the right way; although through personalisation there is an opportunity for greater leniency in brand guidelines in allowing that member of the audience to achieve their goals.

Regardless of the campaign or goals of the originating message, the key to engagement is audience worth. The member of the audience has taken time to react to the message - now it is the responsibility of the person / team managing the engagement to deliver on the implicit promise made by the brand, and attempt to start a dialogue.

Report

Reporting is required to monitor the engagements and to feed the strategic elements of the loop. Since the loop can be anywhere between one and five days in length and at least each channel should circulate reports daily, the reporting element should not be onerous. The job of the reporting step is to deliver pertinent information for review to determine whether the messages are getting across to the audience.

An example report card is:

Message	“What is your favourite car brand? visit our Facebook poll <URL to poll>”
Goal(s) targeted	Currently have 100 Fans looking to get 150
Engagements / Actions (overview)	50 new followers / Used Facebook and twitter messaging and gained 50% increase
Previous engagements / Actions (overview)	Used Facebook competition and only had 25% increase
Lessons learnt	Messaging and Polls returned more fans than competition

The aim is to cover key points ready for reporting back to the team, not to analyse each point.

Review

In the review step, each of the reports for the channels is circulated through the actualisation team, specifically to those in overseeing roles. It is important that, unless the campaign is finished, the review step is not seen as an end point to the engagement loop, but rather preparation for its next iteration.

The primary aim of the reporting step is to create an open platform through which the iterations of the campaign can be challenged, not to judge the success or otherwise of a particular iteration. Review meetings should:

- Share lessons learnt amongst the team, primarily those involved in creating and responding
- Produce / update the review report

To this end, the review meeting should be driven by those in creating and responding roles (those actively involved in engagement) - those in overseeing roles should purely be compiling information ready to produce / update the review report that combines each of the channel reports into a single document.

A simple review report would comprise:

Channel	Goal	E/A	Trend	Total E/A	Value	Notes
Week 1: Twitter	Reach 500 Followers	Deal of week tweet	Deal of week tweet	2 Sales	£3000	Deal of the week messaging generated positive feedback and 2 sales
Week 2: Facebook	Reach 50 Votes	Facebook poll on best car brand	Deal of the week worked well	0 Sales	£50	Polls failed to convert votes into sales

Challenge

The aim of this step is to challenge the next proposed message from the engagement timeline in light of previous iterations of the engagement loop. This step is the prime concern of those in overseeing roles and it is up to those engagement roles to rate expectation of the next message and to challenge it based on lessons learnt.

The challenge step may involve messages from the engagement timeline being parked, it may invoke a slightly wider review of the actualisation plan where research (and possibly small levels of design and build) is used to build a stronger set of messages to place into the engagement timeline for the next or future iterations.

The ultimate aim of the challenge step is to ensure that the goals of the strategy are constantly being kept at the forefront of actualisation and, even at the smallest feasible level of the campaign, there is the assurance amongst the team that the digital strategy goals are being achieved.

Park

Park isn't a step in itself, it is an acknowledgement that, with the best of intentions, not all messages within the engagement timeline will, through their pre-planned nature, engage the audiences through the channels at the set time, or perhaps at all. The reason these are parked as opposed to discarded is that at some point in the planning they were held to have worth to the audience, and whilst they may not have that same worth at the time they are planned to enter the engagement loop, they may still have in the future.

Trends, buzz and inflection points

Audiences and crowds are very poor at relating to that which is entirely new; engagement can cater for this by building upon trends. A brand may launch a new microsite, tie in a social channel and start talking about their latest product, but none of this is likely to be new:

- The audience is aware of what a microsite is - this is just another one
- If a social channel is the chosen medium of communication, the audience should already be there. They are used to brands talking to them through this channel
- The brand has a new product - if there is a history of engagement with the brand it's likely the audience is aware of similar products from the brand. If the brand is unfamiliar, it's likely the audience is aware of a competitor with a similar product

Engagement through digital media can leverage this familiarity to build upon existing trends and buzz within an audience's sphere of consciousness. Whilst a brand may have a distinctive difference from its competitor, if it is competing to deliver to the same audience, the scope of successful engagement (if the competitor is successfully doing this) is likely to be co-aligned. As well as successful competitor co-alignment, research carried out earlier into aligned subcultures and urban tribes should identify areas of trend and buzz through which engagement can occur.

Points of inflection are equally as important as trends - those times where a trend switches direction (this has been excellently written up by Greg Satell at www.digitaltonto.com - the following borrows heavily from his work, although with a distinct spin). Through early identification of points of inflection a brand can move ahead of the trend, the messages and engagement of a particular campaign will appear to carry additional gravitas and worth to the audience and, for brands where there is a greater awareness, there is the opportunity to guide the trend to its next stage.

Greg highlights three particular ways to spot a point of inflection:

- Everybody agrees
- Extrapolating trends leads to absurd conclusions
- There are vast changes in cost

Of these, the first two have specific relevance to spotting the changing attitudes of an audience and their engagement with either a trend that is part of the campaign, or an external trend that has been or can be leveraged to meet the aims of the campaign.

The final point regarding vast changes in costs (or in engagement terms the involvement and level of time and effort a member of the audience has to spend to engage with the campaign) has less merit at a campaign level and greater relevance to a digital strategy as a whole. Vast changes in cost sit at the level of strategy because the required investment by a brand in building a shift at the cost level for an audience is normally considerably higher than a cycle in a campaign will allow.

Everybody agrees

An audience may have a distinct outlook, but an audience in majority agreement means that it has stopped looking at the facts and has begun to put more emphasis on others' perception of the facts. The trend, in effect, has become a series of copycat statements, and whilst this will build awareness through each retelling, the level and value of engagement tails off. Looking at a broader view, Greg Satell states:

“Markets function by buyers meeting sellers, both of whom must believe they are getting a fair deal for a transaction to happen. When everybody seems to agree on where things are going, the pricing mechanism fails to do its job properly. George Soros calls this the principle of reflexivity.”

In place of a financial market space, a campaign targets engagement and audience interest. When an audience stops engaging with the message and simply becomes a sounding board for others' perceptions, this is a sign that the core message is ready to change and the audience is on the hunt for something new; trended “me-tooism” has a short and distinctive role in engagement, but only works for limited bursts and does not necessarily build into brand loyalty.

Extrapolating trends leads to absurd conclusions

“The value of any investment is based on a stream of future earnings. If it's a loan, that return is fixed unless there's a default, but if it's an equity investment then you essentially get a share of those future earnings. Furthermore, when you invest equity, you expect some extra in return for the risk.”

In the creation section of this paper, ideas were rated according to a slightly reworked version of Maslow's hierarchies of needs. This evaluated the investment required (deficiency needs) by the audience (given from brand), and return given (growth needs) to the audience through any particular idea. Altruism is a rare commodity in audiences or groups of any nature - the return might not be fiscal, but at some level the engagement within a campaign needs to reward the audience.

If the idea within the channel has made it into the campaign and digital strategy there will be distinct returns pre-planned at a barrier of entry that rewards the audience as barriers grow. Trends do not always follow such rules - the initial barrier to entry is likely to be low enough for the trend to be established initially. However, over time the investment required by the trend can and does often change.

When the investment required by the trend does not make sense in the future, even if it does in the present, then the trend is likely to be unsustainable and either:

- The campaign behind the trend will need to adjust to lower the investment threshold for engagement
- The audience will move onto a new, less expensive trend

If the trend is external to the campaign but used by it, this becomes an opportunity to lead the audience along a specific route within the campaign.

Trends and inflection points

The problem with trends is that the campaign runs the risk of becoming one message in many competing messages. The differentiation of message worth is difficult to establish and therefore makes it harder to build engagement and brand loyalty. This does not mean that trend alignment does not have its place; trends within an audience are easy to identify - following and analysing them allow a campaign message to be aligned against them.

Inflection points provide an opportunity to guide the next cycle of a trend and as such are outstanding opportunities to establish additional worth with an audience. The key is to look at the future of a trend, extrapolate the short and medium term outcomes, and craft the next set of messages within a campaign to attempt to move the brand into a trend leading position.

Engagement reporting, review and challenging

Rapid reporting is essential in managing the actualisation of a campaign, and specifically the engagement loop, to maximise engagement with the various audiences that will make up a campaign. Without pertinent information it is impossible for a campaign to react and move accurately in response to the demands and desires of the audience, which will lead to stagnation and a misfiring campaign. We previously defined common traits in reports:

- **Brevity** – reports should be able to be reviewed at a glance
- **Daily** – reporting periods should extend to a timeframe no longer than one day (perhaps shorter in rapidly moving campaigns)
- **Trended** – each report should be considered in the light of the previous report to show at a glance the trend of activity

Measurement of the success (or otherwise) of a campaign is key to campaign improvement, and measurements should be reported by the cycles within the engagement loop. It is in the campaign team's understanding of these reports that true value can be wrought from audience engagement and ultimately the campaign; information held by the individual becomes team knowledge and the campaign is empowered.

Within the engagement loop the improvement of a message is handled by the team in the review and challenge steps. The formality of these steps has to be tailored to the nature of the strategy and make-up of the team, but should be aligned to a continuous improvement philosophy.

Reports can be shared around the team to quickly pass on lessons learnt, but must be read and compiled by the overseeing role to provide a more structured response.

Continuous improvement

Successful brands, business and even people always seek to improve. By focusing on the core goals of a company or brand, digital strategy becomes part of that company's or brand's bid for improvement. Whilst specific improvement can be a goal in itself, there is a science of improvement philosophies that can be adopted and used with the KPIs of an engagement loop to try and better the campaign through each iterative loop.

There are many different continuous improvement philosophies, each tackling the problem in a slightly different way to reflect the various challenges faced across different industries. The common antecedent of most continuous improvement philosophies is Kaizen (Japanese for "improvement" or "a change for the better"), which was introduced as part of industrial rebuilding efforts after the Second World War. Each of them, like the engagement loop, attempts to improve a given process across a cycle of activities, and an understanding of these philosophies is helpful in gaining a more rounded understanding of campaign improvement as a whole.

An alternative improvement philosophy that is popular within digital marketing is Six Sigma and the DMAIC project methodology, which stands for:

- Define the scope and goals of the improvement process
- Measure KPIs of the current process and collect relevant data
- Analyse current performance in terms of future requirements
- Improve the current process
- Control the outcome to ensure it is moving as expected

The tools that are available for Six Sigma and DMAIC can be adopted for the engagement loop on an as-required basis, dependent on the strategy and the team actualising that strategy.

Challenging the message

No message within a campaign is strong enough or engaging enough that it will continue unchallenged in one form throughout the duration of the campaign. Singular themes within messages lead to a monotonous drone that stretches the patience of even the most ardent advocate, then wanes into an annoying distraction. Through each iteration of the engagement loop the next message from the engagement timeline is challenged with the results and lessons learnt from the past messages. With this information, common challenges to the message are:

- Is the message relevant at this time to the audience?
- Have messages on this theme worked with the audience before?
- Are messages of this type still moving the audience towards the aims of the strategy?
- Are there more engaging messages for the audience at this time?

However, the most vital challenge to the message is:

“How will this next message improve my campaign?”

It is an important question to ask, since a message that is not improving the campaign is a wasted message, and the next cycle of the engagement loop risks inducing boredom and losing connection with the audience. Messages that are not felt to work should be parked and more engaging messages released into the loop.

Rating the loop

As each cycle of the engagement loop completes, the cycle and the progress through the campaign should be rated. There are two key pillars for rating each iteration:

- Engagement
- Goals attained

Engagement per iteration can be rated:

Growth in population / abs(target population to engage – previously engaged population)

The goals attained can be rated:

Growth in goals / abs(target goals to attain – previously attained goals)

These two ratings show the success in moving towards the target, allowing the cycle to be rated by:

(Engagement + Goals attained) / 2

The progress through a campaign is somewhat simpler - by dividing the growth by the target it is possible to maintain a cumulative record. The following table shows results across a six week campaign:

Target engagement 5000
Target goals 500

	Week							
	Start	1	2	3	4	5	6	Results
Growth in Engagement	0	300	500	1200	800	1200	1050	5050
Growth in Goals	0	50	75	80	50	120	110	485
Message Engagement	0.0%	6.0%	10.6%	28.6%	26.7%	54.5%	105.0%	
Message Attainment	0.0%	10.0%	16.7%	21.3%	16.9%	49.0%	88.0%	
Growth Progression	0.0%	6.0%	10.0%	24.0%	16.0%	24.0%	21.0%	101.0%
Attainment Progression	0.0%	10.0%	15.0%	16.0%	10.0%	24.0%	22.0%	97.0%
Campaign Progression	0.0%	8.0%	20.5%	40.5%	53.5%	77.5%	99.0%	99.0%

Keeping a constant record of the campaign progress is the responsibility of those in overseeing roles so they can ensure the campaign is progressing correctly.

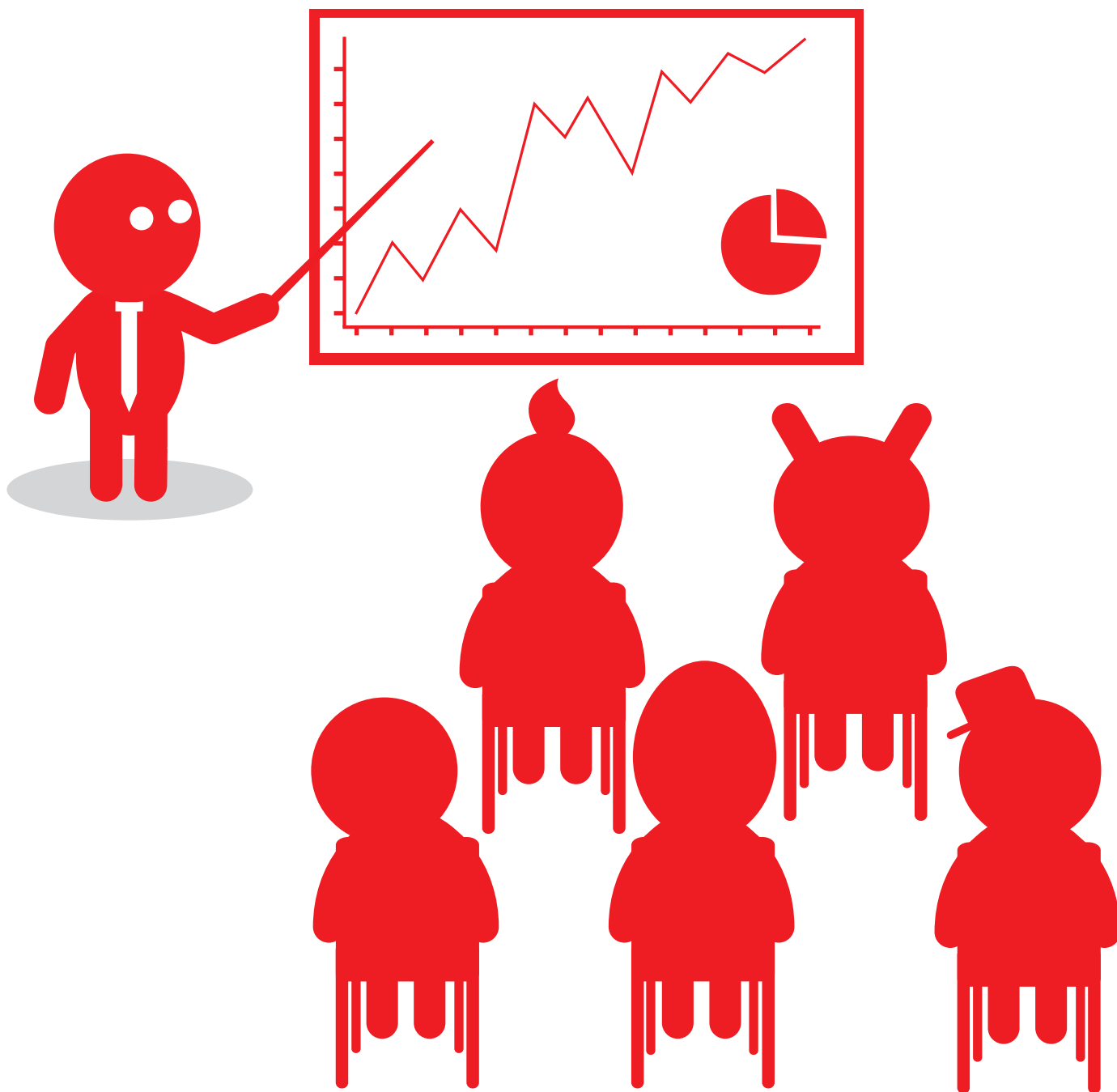
Key performance indicators

As well as evaluating engagement, the actualisation should also be reviewed against the key performance indicators specified in the fiscal evaluation, which was written when determining the feasibility of any particular idea or channel of digital strategy. It is important not to become too fixated on the bottom line KPI targets from the outset; the actualisation of any digital strategy will involve a number of collaborating steps that together will deliver against the digital strategy aims. During the actualising stage, engagement is the primary aim - in short:

“If you look after your audience the KPIs will look after themselves”

However, this does not absolve the actualisation step from any responsibility to KPI reporting. From the fiscal evaluation it is a simple step to build a KPI spreadsheet that records indicators and shows value and worth of the campaign against the previously constructed measures of Value, Worth and subsequent Performance.

KPI reporting across each cycle may detract from the focus of engagement. However, for example on a 12 week campaign, KPI reporting should occur at least fortnightly and preferably weekly. The KPI report should be both accumulated (to balance against the fiscal evaluation targets), and for the reporting period (to give an indication of trend). Those in overseeing roles are both the owners and authors of the KPI report and it is their responsibility to distribute it to those in wider roles and to strategy stakeholders.



Stage 4:
Evaluation

Well, did It work?

On the face of it this seems a simple question, but like most areas around digital strategy it isn't black and white and there are shades of grey in evaluation. Even if a digital strategy achieved all goals specified from the outset there are other areas to consider, a few being:

- Did the digital strategy exceed the goals, if so by how much?
- Were there any unexpected benefits achieved from the digital strategy?
- What was learnt over the course of the actualisation?
- Did the digital strategy lead to any longer term assets?

Digital strategies run in cycles and the purpose of evaluating any particular cycle is not to apportion congratulations or blame, but to learn about how to improve the next cycle.

Fiscal evaluation

The first elements to evaluate in a fiscal review are the key performance indicators; if KPI reports have been generated across the actualisation stage these should be readily available. The KPIs themselves are relatively meaningless - however, within the fiscal evaluation stage for each KPI there is a mathematically modelled Value, Worth and Performance. To recap:

Value

Value is an estimate of fiscal return against a number of KPI criteria being hit, e.g. 1,000 visits to a campaign microsite is worth £10 based against lifetime sales increase from the audience due to increased brand awareness. Of course, the value changes for each digital strategy and for each company and brand. As specified in the fiscal evaluation section, the business stakeholders of the company or brand should set these (with guidance), not those who are responsible for executing the strategy.

Worth and performance

Worth is determined by the importance of a particular measured Value to the underlying business goals and digital strategy. Using the previous example, a strategy may create huge awareness for a particular brand, but if the underlying goals of the strategy were to drive immediate sales, then the awareness and lifetime consumer value would be of less Worth. When it comes to evaluation, successes in this area shouldn't skew the overall results.

The KPI review will give a solid feel for how well the campaign met the financial goals of the strategy and provide overall metrics like Cost Per Acquisition (CPA), Cost Per Sale (if that is indeed possible through the strategy), and savings made, which all deliver against the driving force behind most business goals - money and profit.

Reporting

With the value and worth of metrics defined in the fiscal evaluation of the idea (rather than post-execution of the campaign, to avoid the temptation of working the values back to the KPIs achieved) and KPI data accrued across the duration of the campaign, the reporting does not require complex analysis at this stage.

Campaign KPIs	Numbers attained
Newsletter Sign-ups	100
Previous Site Links	150
Current Site Links	160
Mean Ranking Improvement over key terms	0
Dealer Purchases	2
Brand Searches	200
Generic Searches	2000
Previous Visitors	5000
Current Visitors	7500
Previous Unique Visitors	2000
Current Unique Visitors	3000
Enquiry forms completed	40
Test Drive application forms completed	30
PDF Car specifications sheets downloaded	500
Pages viewed (products / public)	8000
Pages viewed (information / public)	2500

ROI and performance

Return	Fiscal value	Performance
Newsletter Sign-ups	£100.00	£123.13
Site Linkage increase	£5.00	£3.29
Ranking over key terms	£0.00	£0.00
Increase in brand searches factored against generic terms	£0.00	£0.00
Dealer purchases	£2,000.00	£2,472.53
Increase in visitors	£25.00	£18.50
Increase in unique visitors	£50.00	£41.20
Enquiry form completed	£28.00	£24.23
Test Drive application form	£3,750.00	£3,708.75
PDF Car Specification Sheets downloaded	£75.00	£57.69
Pages viewed (products / public)	£40.00	£19.23
Pages viewed (information / public)	£0.25	£0.10
Total	£6,073.25	£6,468.65

Audience engagement evaluation

The collateral benefit of digital strategy is the creation and growth of engaged audiences. Whilst straight numbers can be measured and allotted value and worth through the KPIs within the fiscal review, these cannot adequately give the true picture of the success or otherwise of campaign engagement.

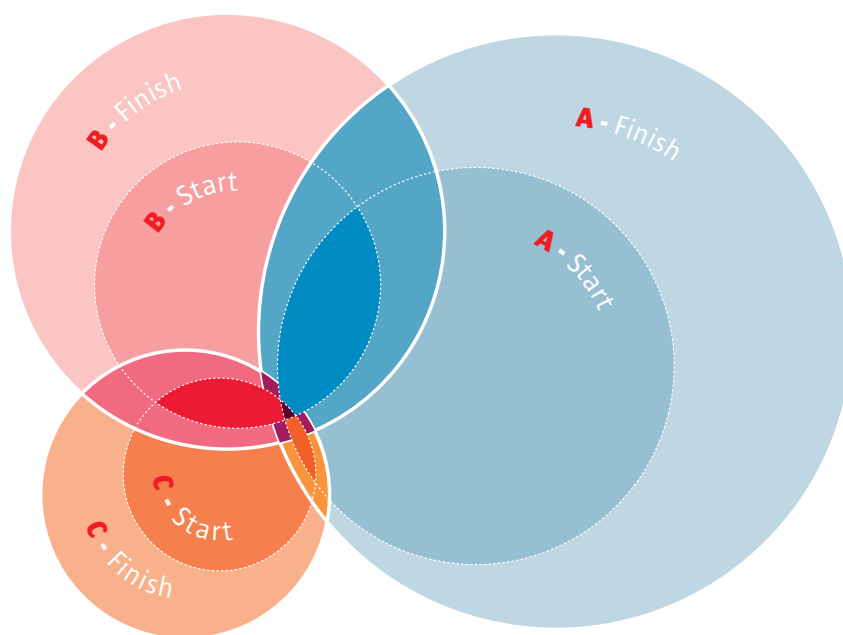
Of course, engagement is not a means to an end for any campaign. Communication with the audience is a means to deliver against the digital strategy goals; audience engagement does however have subsidiary benefits when considering lifetime value of the audience and its equity, normally called customer equity. The three key drivers to customer equity are:

- Value equity: What the customer assesses to be the value of the product or service provided by the company
- Brand equity: What the customer assesses to be the value of the brand, above its objective value
- Retention equity: The tendency of the customer to stick with the brand even when it is priced higher than an otherwise equal product¹

By evaluating audience engagement, these equity drivers can be measured, recorded and used to show the effects of the campaign both for the campaign loop and in the scope of the wider digital strategy.

Audience migration and growth

- A:** Campaign visitors
- B:** Brand purchaser
- C:** Brand advocate



The ebbs and flows of an audience through a campaign are in many respects as important as the size of the audience. Certainly, engaged audiences in large numbers are a definite boon to a campaign, but without alignment to the goals of the digital strategy they are simply large numbers doing little. The evaluation of audience migration, therefore, is not where the audience has moved to, but how the audience has been moved towards the goals of the strategy:

- Has an audience been introduced to the brand through the campaign?
- Has an audience been educated about the brand or particular product through the campaign?
- What level of the audience has moved to purchase from connection with the campaign?
- Where were your audience and where are they now?

It is through the last question that strategy is derived. Just as the engagement loop is a microcosm of the overall strategy, the strategy loop must contain continuous improvement processes like the engagement loop; and since not all audience members or indeed audiences will achieve the final steps towards strategic aims in one step, the evaluation of audience migration and growth serves to prepare for the next stage in the strategy.

Audience sentiment

Evaluation of audience sentiment is focused on the achievements of the campaign. Broad brush sentiment assessment can be achieved through the plethora of buzz monitoring tools, to various degrees of success and accuracy. Sentiment monitoring should not, however, be constrained to numbers – some opinions within audience groups are more valuable than others.

In planning the messages and routes of messages within the campaign, both urban tribes and communities of practice were touched upon as keys to getting the right tone of the message and to identify key influencers within those communities. The litmus test for campaign sentiment is how those key influencers are touched by the campaign and their opinion of the brand/company. A positive ranking from these key influencers will allow rapid growth of message in future campaigns, leading to greater effectiveness in shorter timescales.

Engagement and action

Throughout the actualisation process, the actualisation team is encouraged to engage with the audience. As part of evaluating the campaign, the engagement must also be evaluated; this evaluation must first be segmented into:

- Touch point – where and how did the engagement occur?
- Audience – which audience group was engaging with the message and campaign?
- Level – what was the involvement required to engage?
- Value – what was the value of the engagement when rated against the strategic goals?

With the various engagements across a campaign segmented and rated in this way, the following question can be answered:

“Which engagement routes (touch points, audiences and barriers to entry) gave the most valuable engagement?”

Once the average is taken from all engagements across routes, the next important question can be answered:

“What was the most valuable engagement route across the campaign?”

The answers to both questions can then be used to shape future campaigns, especially the structure of future engagement timelines (once balanced against migrating audiences).

Engagement contract

The engagement contract isn't strictly an evaluation step, it is a check and balance for the campaign that sets the rules for future campaigns – it is more important than mere evaluation. An engagement contract is the implied promise throughout the campaign from the brand to the audience about its value, and it is sealed through the audience's engagement to the brand. The engagement contract is a form of social contract, maybe not as formal as the theories of Hobbes, Locke and Rousseau (and certainly not as grandiose), but in terms of the success of a brand in on-going digital strategy certainly as important, since:

- Nothing devalues trust in a brand like a broken promise
- Digital footprints of betrayal are exceptionally hard to erase
- Audiences are rarely shy about advertising when they have been let down, especially those that have taken the trouble to engage

A break of the engagement contract destroys value and brand equity since the goal posts have been moved by the brand, leaving retention equity a very distant proposition.

This does not mean that engagement contracts have to be singular in approach and facet across multiple audiences. Differing product groups and routes to brand should leave plenty of room for brand expansion. A brand can be many things to many different audiences; however, once engaged across a route, the brand should remain true to the message that evoked engagement.

Lessons evaluation

Throughout the campaign, lessons should have been noted during actualisation through engagement reporting, KPI reporting and the results of the engagement loop review. To assume that any digital strategy will be correct from the outset would show an amazing amount of arrogance and a gross simplification of the audiences that the digital strategy is trying to engage with. The lessons recorded through evaluation of success, surprises and failures form the backbone of the evaluation of the mistakes or missing elements of the campaign and digital strategy thus far.

Lessons learnt are not failures in the strategy if they are recorded and the lessons are implemented in future campaigns. These lessons tend to fall into two camps:

- Internal lessons: including self perception and self recognition / examination
- External lessons: including audience perception and audience recognition / examination

Both areas fall generally into the assumptions made when entering into the digital strategy process.

Internal lessons

Internal lessons come from the new information that the campaign derived about the brand / company. It should come as no surprise that the internal perception of any company and / or brand and their corresponding strengths and weaknesses can differ radically from their actual position. This can leave the company and / or brand open to missing out on opportunities and misidentifying threats, both at a larger business level and certainly within the scope of digital strategy.

A degree of misperception comes through closed cultures within a brand, as surrounding people influence each other with the same message and pre-built assumptions that are not shared by those outside of the closed culture. These incorrect messages can, if unchallenged, live through generations of employees and stratify into some quite bizarre thinking. It is not the primary role of digital strategy to challenge prevailing ethos; however, to successfully engage, the prevailing ethos either needs to become aware of the lessons fed back through audiences, or live up to the level of where the ethos places them.

Internal lessons also often come about as a result of misperceptions in process. A signpost of such misperception occurs with failure as a result of success. A weakening of brand perception because marketing endeavours have proved to be so successful that the brand can't deliver against promise is a far too common occurrence.

The challenges represented by internal lessons are not in engagement or campaign execution, the challenges reside in the marketing teams and board rooms of the companies that should learn from these lessons and take steps to adapt / improve accordingly.

External lessons

External lessons relate to the opportunities and constraints of engagement with audience groups that a brand and / or company may have on entering into a digital strategy, or which may present themselves across the lifetime of that strategy. Successfully capitalising on unexpected opportunities through audiences and quick identification of potential threats to external perception or perceived opportunities are the reasons for adopting external lessons, and can deliver additional business benefits external to the original goals of the strategy.

The most often talked about external lessons found through campaigns in general are those of undiscovered audiences, areas of brand alignment that were previously unheralded and outside perceived market scope. There are many instances of counter culture adoption of utilitarian brands and the products they market. Of course these audiences present challenges and opportunities in equal (or, dependent on audience, unequal) measure.

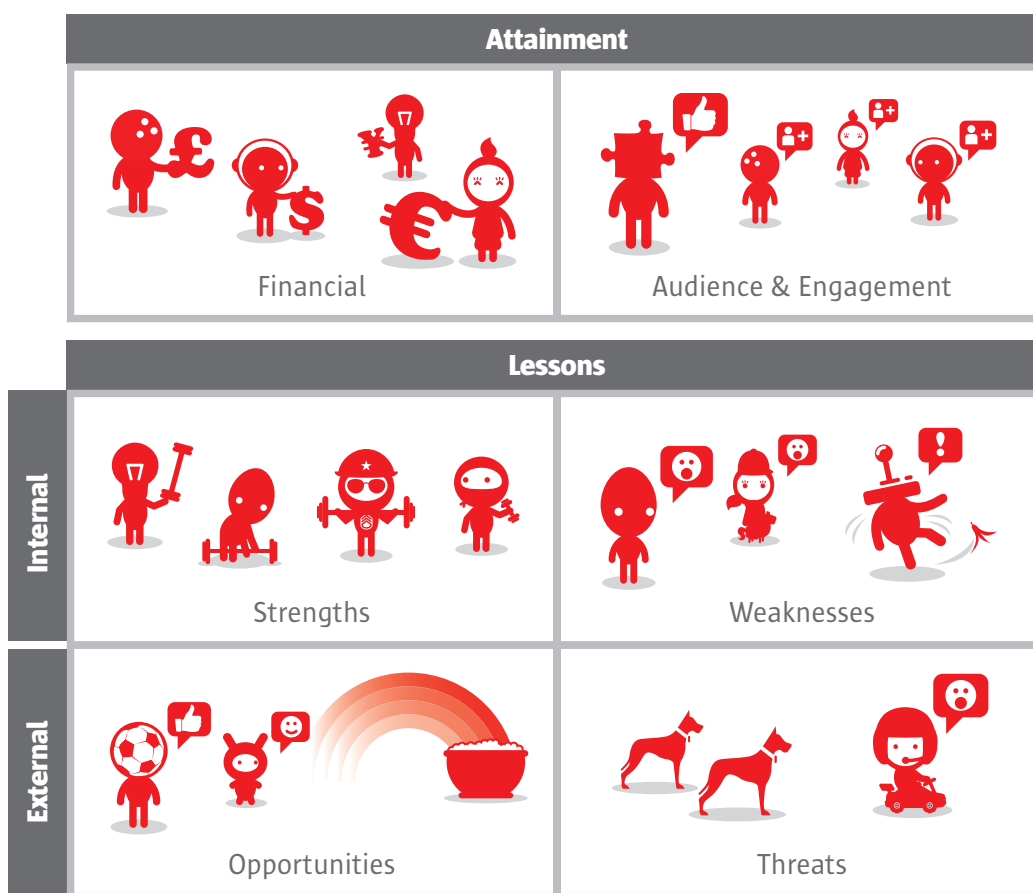
External lessons can provide the springboard for the next phase in digital strategy; learnt properly, they provide an excellent opportunity to exceed and grow original digital strategy goals and potentially the fundamental goals of the originating company and / or brand. Unheeded, digital strategy runs the risk of running through continually ineffectual loops until it becomes a meaningless appendage of a company's routes to growth and potentially damaging to the company / brand.

Bringing evaluation together

For those familiar with Kaplan and Norton’s balanced scorecard method of evaluation from the 1990s, many of the themes expressed in the evaluation section will be familiar. Digital strategy requires the more heuristic and rounded approach to evaluation delivered by the balanced scorecard, but since it is only one aspect of wider business strategy and there are lessons arising from the digital strategy to adopt (or not), it may be too comprehensive.

The previous sections of evaluation create an unbalanced scorecard that places greater emphasis on learning the lessons of a campaign to feed into the next stage. The areas covered in the unbalanced scorecard are covered below.

An unbalanced scorecard



The initial split in the scorecard is between attainment and lessons. The lessons section unbalances the scorecard with greater emphasis being brought about in the evaluation. Attainment is still a crucial measurement of success, and lessons are not the same as excuses. If the aims of a digital strategy are measured correctly against the background as stated in the planning section, there should be no reason for the aims of a campaign not being hit and the review of strategy to either hit or make the expected movement towards the aims. Lessons are given precedence in the scorecard because it is through the lessons of a campaign that the strategy grows and becomes more successful.

Completing the scorecard is a simple matter of bullet pointing from the previous evaluation steps. The scorecard is a snapshot of the campaign and strategy, the detail of the digital strategy can be delved into by completion of the previous evaluation steps, or even a review of the previous “workings” - the documentation that has been created in each stage of planning, creating and actualising the digital strategy.

The bottom line

This section started off with the question “well, did it work?” Each subsequent step has sought to answer a small part of that question and to give further insight into the digital strategy that was not captured by the initial aims. The answer to the original question cannot, unfortunately, be provided by this paper. No two digital strategies will be alike, so it is necessary to follow the method, learn and take on the lessons for each digital strategy – only then will the answer and the eventual bottom line become apparent. What does hold true across all digital strategies is the ultimate bottom line which all digital marketers should consider when evaluating:

“Did the strategy bring more benefit to the business than the effort expended?”

This is the litmus test by which digital strategy will and should be measured - the rest is just a matter of degrees.



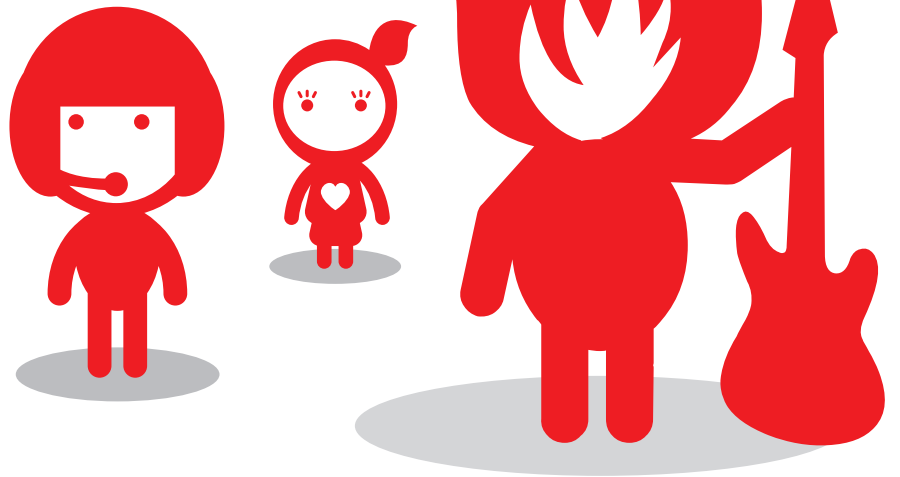
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