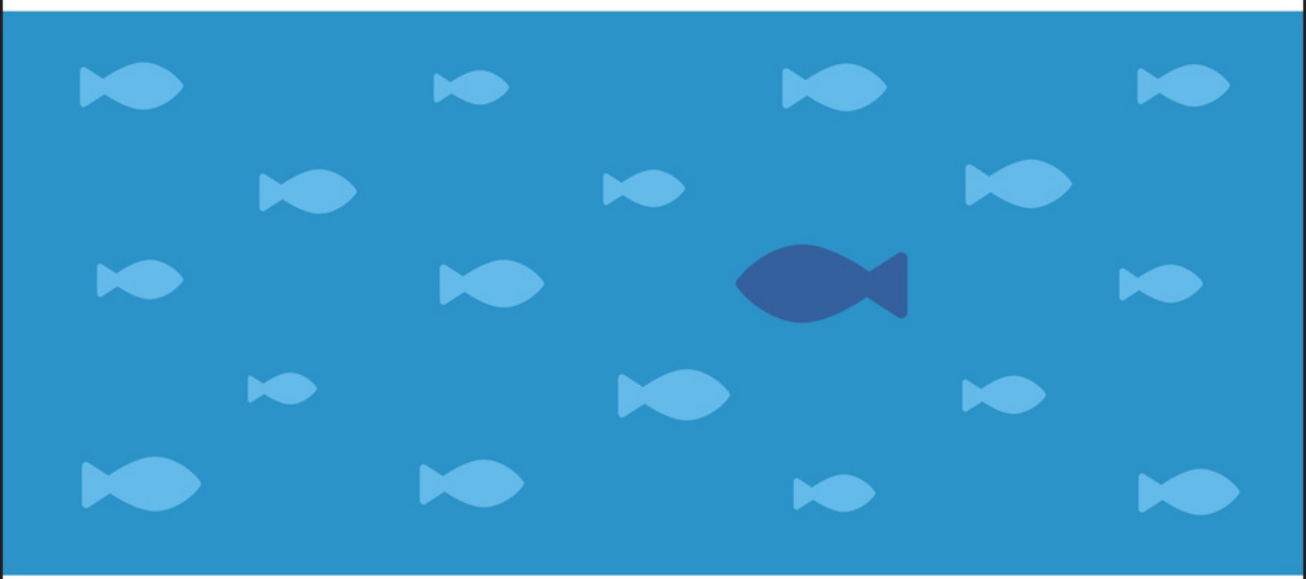
UPSTREAM MARKETING

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INSIGHT + IDENTITY + INNOVATION



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CHAPTER 8

UPSTREAM MARKETING 7-STEP APPROACH

"If there is any lesson I've learned it's that lightning bolts don't hit very often. It is a process and if you don't understand that and if you sit around and wait for the lightning bolt, you're not going to be very productive."

—Peter Rummell, *former chairman of Disney's Imagineers*

"Art resides in the quality of doing, process is not magic."

—Charles Eames, *American designer*

"Plans are only good intentions unless they immediately degenerate into hard work."

—Peter F. Drucker, *author,* The Practice of Management

AT A DINNER WITH A few luxury automotive buyers, held at a top restaurant in Orange County, our consulting team wanted to understand what motivated purchasers of luxury automotive brands.

After some time, one of the dinner attendees felt the need to set us straight with his views: "I'm a jeans and T-shirt guy. I don't wear an expensive watch. I don't live a luxury lifestyle. I just like driving a great car."

Weeks later, we prepared a proprietary customer demand framework, drawing on this and other research inputs, which informed the upstream marketing strategy for launching the client's new luxury automotive brand. The project also resulted in skills transference—the principles, practices, and processes we used are now embedded in the client's organization.

Upstream marketing doesn't just happen. It has to be engineered. Top strategists invest in a systematic approach that leads to profitable business growth. They undertake similar steps to identify strategic opportunity areas, build value propositions, and create strong brands, supported by cultural and organizational enablers.

At the same time, *exactly how* each company approaches upstream marketing varies. Different actions are needed when creating a theme park attraction, developing software, establishing a new sales channel, or targeting a new customer segment.

Industry structure, investment horizons, technical application, time to market, and internal resources affect how each company operates. While the principles hold, they need to be adapted to the situation.

ACTIVATING UPSTREAM MARKETING

Our firm, EquiBrand Consulting, helps companies improve their business performance through a principle- and process-based approach to upstream marketing, integrating with downstream implementation.

Most clients we work with have pieces and parts of upstream marketing—glimmers of insight, identity, and innovation—but lack the integrated whole. Company leaders go from one meeting to the next, one planning cycle to the next, and never bring the pieces together.

To assist them, we use a proven seven-step approach to jump-start upstream marketing, as shown in figure 8.1 and further detailed in the appendix.

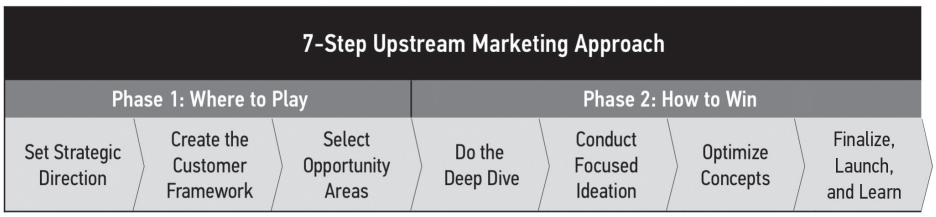


Figure 8.1

This approach is broken down into two phases. Phase one, the first three steps, defines where to play, including direction setting, segmentation, and strategic opportunity selection.

In phase two, the final four steps focus on how to win, using deep dives, ideation, concept development, and launch and learn. What would have to be true is asked throughout, consistent with the create-test-and-learn approach. Companies may have multiple upstream marketing cycles going on at the same time, with the approach modified across a portfolio of opportunities.

In executing upstream marketing, it's best to start with phase one. The first three steps should take roughly ninety days, including quantitative research, to establish the opportunity areas and customer framework fact base. If that's impractical, start with phase two, and rely more on qualitatively based inputs.

Think of phase two, How to Win, as a cycle that repeats. This phase also takes about ninety days, depending upon internal and external factors. Each iteration cycle focuses on a limited set of strategic opportunity areas so they can be appropriately resourced and managed.

For example, one cycle might focus on establishing a new business model, another on developing unique value propositions, and a third on penetrating a new customer segment.

The tight timing for each phase is intentional and recognizes both the Pareto 80-20 principle and Parkinson's law.

Purposely reduce the time available and focus on on achieving 80 percent of the value with only 20 percent of the time and effort. With less time, make decisions with partial information. Strive to be "roughly right." After all, many upstream decisions can be reversed. Favor speed and agility over precision and completion. In other words, focus on progress instead of perfection.

To learn, consider an upstream marketing pilot, and then refine the process later. Piloting can offer tangible results while demonstrating the principles, framing questions, and process steps.

As the process unfolds, you may find some things require more attention: The Level 3 customer framework may need to be hypothesized first, then quantified later. Similarly, brand strategy concepts can be drafted now and refined over time.

EQUIBRAND CLIENT CASE

Here's an EquiBrand end-to-end case to show how the seven steps integrate and unfold in practice. Certain facts have been changed to protect confidentiality but the process steps are real.

Our client was considering launching a new luxury automotive brand and hired us to assist with developing the launch strategy and action plan. They wanted to understand, *if* the parent company were to launch a new luxury automotive brand or sub-brand, *how* should it do so to maximize sales and business success?

As background, auto manufacturers do a ton of research, breaking down the market by vehicle type—four-door, midsize luxury, SUV—then further, by benefits the drivers seek—performance versus a comfortable ride or the prestige of a luxury brand.

The problem? The same auto companies subscribe to the same industry reports, yielding the same information. It's not proprietary insight, and it's not enough.

Our client sought a decidedly different view and wanted to

create a consumer demand framework that went beyond the *what*s and *how*s to obtain deep, proprietary insight into the *why*s. Why do individual luxury buyers behave a certain way, based on underlying attitudes and needs?

The project approach involved two phases, each taking roughly ninety days. Phase one focused on strategic direction setting, segmenting the market, and identifying opportunities.

Phase two addressed how to win—defining the value proposition, positioning, strategy, and plan. Here is an overview of each step, including select details—sample interview guides, meeting agendas, and templates—to use in your own organization.

Step 1: Set Strategic Direction.

Any upstream project should be launched with two goals in mind. First, set the project up for success through project planning, and second, establish strategic direction.

PERFORM PROJECT PLANNING TASKS

The first planning task is confirming team roles and clearing project calendars. Four potential team member roles include:

- The team leader who oversees the project and is accountable for its success
- Cross-functional team members to provide specialized expertise
- Executive sponsors, from the C-suite or other areas, to steer the project
- Outside partners like consultants, agencies, and others, to help

Another early planning task is to document additional, related, or redundant activities going on within the organization in parallel. Put these initiatives on a "stop doing" list or combine them with other efforts. This helps free up resources to fund upstream marketing in a more meaningful way.

Also, publish a master project calendar with clear timelines so team members—especially executives—can track progress. "Where'd that come from?" is not a question you want to hear when presenting final recommendations. Upstream marketing involves real-time decision making, and findings build cumulatively, so consistent participation is required.

HOLD PROJECT KICKOFF AND CONFIRM OBJECTIVES

Next, hold a kickoff meeting, lasting from a couple of hours to a full day. The kickoff should confirm project objectives and review upstream marketing principles and processes.

Use the time to share customer insights, hypothesized opportunity areas, and potential solutions. A great probing question: "What do you know about your important customers that your competitors don't know?" Answer this question to inform the situation and identify learning gaps.

CONDUCT A THREE C'S ANALYSIS

Coming out of the kickoff, immerse yourself in the situation. Undertake a three C's analysis—for company, customers, and competitors—to organize relevant facts. Here are details about each component:

Company analysis looks internally to understand the current state of the business and brand, across growth strategies and plans, technical capabilities, brand strength, and product assets.

Customer analysis recaps what you know, think you know, and don't know about the buyer and buying process. Use existing research to inform hypotheses and validate them during Step 2 customer interviews.

- Who are our customers and prospects? How do they segment attitudinally, behaviorally, and demographically?
- What's important to them? Construct a benefit hierarchy to organize product attributes and benefits viewed through the customers' eyes.
- How do they buy? Map the entire decision journey—before, during, and after purchase. Ultimately, you'll want to align brand touchpoints with the customer journey, so begin mapping this early.

Also, spend time analyzing relevant market trends and new technologies, now and in the future. These will help in developing solutions in later steps.

Competitor analysis informs ways to differentiate. You could spend months on this. Do it instead within a week or two. Breakthrough innovation rarely comes from analyzing competitors. Still, there's value in setting a baseline across competitive product offerings, brand positionings, and strategic intent.

CONDUCT INTERNAL INTERVIEWS

Armed with this fact base, conduct internal, cross-functional interviews to fill learning gaps and inform hypotheses development. Here is a high-level sample interview topic guide.

SAMPLE INTERNAL INTERVIEW GUIDE

Objective: To gain perspective on issues, hypotheses, challenges, and opportunities in driving brand and business growth.

Note: The interview should last thirty to forty-five minutes, and only aggregate responses will be reported (to ensure confidentiality).

1. Describe your role, responsibilities, and background (as relevant).
2. What are the leading challenges and opportunities facing the organization today? (What keeps you up at night?)
3. Consider the current state versus future state (i.e., SWOT analysis):
   - What are internal strengths (S) and weaknesses (W)?
   - What are external opportunities (O) and threats (T), including market and technology trends?
4. Who are your customers, what's important to them, and how do they buy? How do they naturally segment based on attitudes, needs, and behaviors?
5. Describe the current value proposition. What benefits do you offer today? What benefits might you provide in the future?
6. In growing the business and brand, what are potential strategic opportunity areas? Probe: new markets, channels, segments, products, etc.
7. How would you define "success" for this project? What barriers need to be overcome, internally or externally, to succeed?
8. Is there anything we didn't ask you that you think is crucial as we move forward with this project?

With our auto client, it wasn't until *after* executive interviews that we realized certain market constraints in launching the brand. Due to several factors, the new brand needed to be sold, at least initially, through its *existing* mainstream dealer network, not via a separate luxury channel.

This would be like Toyota launching Lexus (their luxury brand) and physically locating the brands side by side. This constraint raised a few issues: Was this approach even possible? Would consumers consider purchasing a luxury vehicle physically sold next to its mainline brand? Could we design a luxury experience within the existing channel?

These framing questions guided insight-gathering and remaining project steps. Other questions emerged: Did a consumer segment exist that might be attracted to a new channel approach? How should we position the new brand?

Based on Step 1 findings, we created an initial list of hypotheses, including who to target (a younger millennial consumer), new channel concepts, and success conditions under various marketing scenarios.

Step 2: Create the Level 3 Customer Demand Framework.

The goal of Step 2 is to get out of the office, talk to customers, and create a proprietary to-whom, for-what framework. Use exploratory research followed by quantitative research, ideally, to create the framework.

CONDUCT EXPLORATORY RESEARCH

With our client, we created several interview topic guides across auto industry experts, luxury category influencers (both inside and outside automotive), and end customers.

Our exploratory research included professionally moderated interviews with target consumers behind a one-way mirror. We pre-recruited research respondents and had them complete two "homework assignments." First, inventory and photograph brands they owned—*outside of automotive*—that they considered premium or luxury; and second, take pictures of their existing vehicles to be used later.

The research discussion guide started very broad, about luxury in general, and then narrowed to automotive, including specific vehicle makes and models.

Rather than anchoring on product attributes, we focused on uncovering unmet needs, benefits sought, and jobs to be done. Here's the guide.

SAMPLE CUSTOMER EXPLORATORY INTERVIEW GUIDE

1. Topic introduction, housekeeping, and warm-up exercise
2. Luxury category exploration (outside of automotive)
   - Share homework #1 images with the group
     - *What defines luxury for you?*
     - *What do all these products have in common?*
     - *What's required to be considered luxury or premium?*
     - *With luxury, what "job" needs to be done, rationally and emotionally?*
3. Luxury vehicle discussion
   - Share homework #2 images and discuss currently owned household vehicles
   - Explore needs and benefits sought from luxury vehicles (e.g., ladder rational to higher-order emotional and experiential benefits)
   - *What are you seeking from your luxury vehicle? What job does it do for you?*
   - *Why? Why? Why? (as the basis for benefit hierarchy development)*
4. Customer decision journey and brand touchpoints
   - *Think about your most recent vehicle purchase—before, during, and after the purchase (use flipcharts to structure discussion)*
   - *What were you experiencing, thinking, and feeling at each point?*

- *What were the pain and gain points across the process?*

5. Value proposition requirements and alignment
   - *What do you seek with a luxury vehicle purchase? Probe elements (product design, styling, performance; the sales process; service experience; other owner experiences—warranty, financing, trade-in; brand image)*
   - *If you could create the ideal value elements/planks, what would they be?*
6. Brand exploration (probe luxury brands and imagery)
   - Use sorting exercise to understand perceptual differences across brands
   - Probe individual brand imagery using projective techniques—describe the typical driver of each vehicle brand. Where do you fit? Why?
   - Probe initial positioning and growth idea "trigger statements"

The goal was to immerse ourselves in the luxury category and target consumer. We explored the customer decision journey and benefits sought from their total experience—who, what, where, how, and, most importantly, why?

What constitutes luxury, both within and outside automotive? Why purchase a luxury vehicle when you can easily get from point A to B at a much lower cost? Why buy one brand over another? The insight helped answer "what would have to be true" in launching the new luxury brand within the mainstream channel.

In addition to traditional research, we conducted roundtable dinner discussions for luxury buyers to interact with each other in a more informal setting.

Coming out of the exploratory sessions, we identified several factors that split consumers into different attitudinal groups.

We learned, for example, that for certain buyers, luxury is seen as a lifestyle that extends beyond automotive—to what they wear, where they travel, and how they live. These consumers like to stand out in a crowd, will only purchase certain brands, and desire a luxury

experience, including a high-end dealer service experience. They buy Rolex watches and wear designer clothes.

For others, luxury begins and ends with their vehicle—a fancy showroom and luxury amenities are not necessary. Instead, they find them off-putting. If they could, they'd skip the dealership and purchase their new vehicle online and get it delivered directly to their home.

Across the groups, we mapped the end-to-end customer experience—from pre-purchase (before), purchase (during), and post-purchase (after). We also created a hypothesized customer framework and value proposition, encompassing product, dealer experience, sales, service, and other value planks.

VALIDATE THE FRAMEWORK

After hypothesizing the segments, an optional, though recommended, step is to quantify the segmentation. With our client, we created an online, twenty-minute survey, with a sample of over 2,000 consumers.

This sample was intended to replicate the US population of people in the market for a luxury vehicle. Quantification allowed us to validate hypotheses, confirm unmet needs, fill in data gaps, size, and seize strategic opportunities.

The survey asked respondents to rate their agreement to over seventy-five statements, on a five-point scale, as the basis for defining clear segments. Here are three sample questions, informed by exploratory insight:

- "I'm just a jeans and T-shirt kind of person."
- "I own a luxury vehicle, but I don't really consider myself a luxury buyer outside of automotive."
- "Luxury is a lifestyle that extends into other areas of my life—what I wear, where I travel, and where I live."

Through the hypothesized framework and follow-up statistical analysis, five segments were confirmed quantitatively, with attitudes, needs, and behaviors tightly clustered. Here is a high-level summary of the segments that were fully profiled and sized:

- **Luxury vehicle enthusiasts** consider themselves "car people" and do their research before ever stepping into a dealer showroom. When they get there, they value a hassle-free experience over luxury amenities. For them, a car doesn't need to be flashy, as they're not out to impress anyone. Instead, they look for particular benefits—the latest in features and technology, as well as quality craftsmanship and performance.
- **Luxury brand enthusiasts** look for vehicles with innovative technology, safety, comfort, and performance. They feel that what they drive is a reflection of their personality, and as such, are selective about the brand—they have a specific image to maintain. To them, luxury is a lifestyle that extends to many areas—what they wear, where they travel, how they live.
- **Achievement and experience-oriented consumers** feel the car they drive exemplifies their achievements. They have strong preferences in brands and believe "true luxury" brands have a strong history and heritage. They desire a white-glove dealer experience and want to be treated differently than at a non-luxury dealership.
- **Aesthetics-driven consumers** are concerned with how the car looks and what the brand says about them, not how it performs. They aspire to drive something that uniquely reflects their image—something not everyone is driving. A luxury brand is essential, but they don't value features and technology, so a base model will do.

- **Low-involvement consumers** don't need a flashy car and don't care what people think about what they drive. They may buy a vehicle merely because it's on sale and are less focused on vehicle performance, style, and technology/features. They also wish for a quick, no-hassle sales and service process.

SELECT TARGETS

In confirming targets, common criteria include segment size, attractiveness, and brand fit. In prioritizing segments, it's sometimes easier to first decide who *not* to target than who to target. A process of elimination helps narrow the choices.

With our client, for various reasons, we deleted the achievement-oriented, aesthetics-driven, and low-involvement consumers. We labeled these *consumption* rather than *marketing* targets, hoping to attract these consumers without spending against them.

We then narrowed in on two potential marketing targets—luxury vehicle enthusiasts and luxury brand enthusiasts—for additional investigation. After the groups were identified, a typing tool was created to map actual customers into segments and inform subsequent research efforts.

Step 3: Confirm Strategic Opportunity Areas.

The goal of Step 3 is to identify and prioritize strategic opportunity areas (SOAs), including customer demand spaces. This step involves a strategy session or series of them to confirm the current state, prepare where-to-play strategic opportunities, and develop how-to-win concepts. Here is how the strategy session(s) should unfold.

First, answer the question, *where are we now?* This task involves reviewing the three C's analysis and customer management framework, including bringing consumer segments to life.

Prepare and present segment profiles, including verbal descriptions, photos, and videos of your target (if you have them). Who are they, what do they value, what are the jobs to be done? As questions arise, capture them on a flipchart and answer them during the deep dive in Step 4.

Next, begin with the end in sight. Consider the desired future state and potential SOAs to get there. This step is based on strategy rather than creativity. Strategically identify where to focus and save the blue-sky brainstorming for later.

End the strategy session by recapping high-potential SOAs, filling out a one-page summary for each (as shown in Figure 3.8). Title each SOA and add texture around five points: (1) the target description, (2) customer insight, (3) the need/situation, (4) jobs to be done/benefits sought, and (5) opportunity sizing. Don't be overly concerned about the one-page format, but do write them down.

Finally, prioritize the SOAs using management experience and judgment to narrow the list. Consider the impact-effort matrix or conduct a Harvey ball analysis of the strategic, customer, financial, and operational screens.

Determine which ideas to pursue now, and which to discard or hold for later. Ultimately, limit SOAs to only a few, though the exact number depends on available resources.

With our automotive client, we confirmed two SOAs:

1. Strategically position the new brand, including defining the target consumer, key benefits, and reasons to believe.
2. Develop a relevant and distinctive value proposition to launch the luxury brand within the business constraint of two brands, one channel.

With SOAs confirmed, the process shifts to how to win. The four steps of that phase—deep dive, focused ideation, concept optimization, and launch and learn—are described next.

Step 4: Do the Deep Dive.

The goal of the deep dive (sometimes called the discovery phase) is to obtain in-depth insight into the target consumer, marketplace, and technical solutions to address the specified SOAs.

Up to this point, research with consumers is general in nature—across an "average consumer" to obtain insight on the *entire market* and ensure you're not missing something. Going forward, talk to *target consumers* identified through the customer demand framework, with the end goal of aligning with their needs.

There may be multiple targets to learn from, including current and potential brand users. Typically, a sample of ten to twelve consumers per target is a good number to recruit. After that, diminishing returns set in, with only marginal improvements in insight.

The deep dive with our luxury enthusiast target was to understand their attitudes, needs, and behaviors, including the role the dealer and salespeople played in brand choice and the decision journey. The quantitative research, for example, confirmed that roughly one-third of consumers agreed that "If I could, I would prefer to purchase my vehicle entirely online and never talk to a salesperson."

The strategic opportunity: How might we build on this insight to create a new business model or value proposition to address the two brands/one channel issue? What opportunities existed for redefining the dealer experience? What were the target consumers' unmet needs or jobs to be done?

In addition to consumer research, we designed a separate workstream to understand marketplace forces and factors, including alternative retail formats. This initial strawman draft output provided context for considering alternative retail concepts, as described in figure 8.2.

	Alternative Channel Strategies Probed			
Concept	**Separate Channel**	**Showroom Within a Showroom**	**Showcase Store**	**Online Only**
Description	Totally separate locations	Separate brands, with a single entrance and unique signage, flooring, lighting	Smaller showcase store, limited selection	Fits with consumer needs (1/3 prefer to avoid dealer entirely)
Example	• Gap vs. Banana Republic • Toyota vs. Lexus	• Polo Shop within Macy's • Best Buy/Magnolia	• Tesla • Nike	• Amazon • Other online
Pros	• Shows commitment • Separates from parent brand	• Cross-shop and compare • Creates perceptual brand distance	• Invest in fewer, more strategic locations	• Fits with consumer desire
Cons	• Cost to build volume • Brand image investment	• Links with parent brand • Superficial separation?	• Limited selection • Location must be accessible	• Cost to build • Brand image expectation and investment

Figure 8.2

As part of the deep dive, we explored how to meet sales and service needs in nontraditional ways. Using "how might we" and "what would have to be true," we focused on two issues:

- How might we create a showroom-within-a-showroom concept—two linked brands—through signage, amenities, and other markers?
- How might consumers skip the dealer showroom experience entirely, using digital technology to create an Uber-like experience?

These issues presented areas to explore during focused ideation, as described next.

Step 5: Run a Focused Ideation.

The goal of focused ideation is to generate new business models, products, services, and other concepts to address particular opportunity areas. In other words, to creatively solve customer problems.

Proven exercises, described in chapter 6, are used to diverge, converge, and generate ideas. The ideas, when related to problem statements, result in breakthrough solutions.

With our client, ideation focused on strategic positioning and alternative channel concepts. For the channel discussion, we broke the process down using a *before, during, after* model (or pre-purchase, purchase, and post-purchase) to describe the customer experience through their eyes. Figure 8.3 provides a snapshot of that raw ideation output.

How might we deliver a luxury experience to target consumers?

	Before (Sales)	During (In Store)	After (Service & Ownership)
Opportunity	Align purchase process with how consumers want to buy, leveraging digital technology, unique store formats, etc.	Develop optimal in-store/in-person experience across various retail formats/scenarios	Develop ownership sub-brand with tiered service levels aligning with luxury ownership
Insight	Growth of vehicle buying services, interest in "no haggle pricing," redesigned channel acceptance, etc.	"We missed the boat—thinking customers want to hang in-store. Most would rather not be there."	"The best service experience is no service experience."
Potential Ideas/ Implications	• Online pre-sale • Satellite boutique showroom • Pricing program - Transparent pricing - Guaranteed pricing • Leasing program	• Showroom within a showroom • Dedicated luxury advisor • Self-guided test drive • Premium sales kit	• Online car scheduling • Valet service, demo vehicles • Free maintenance • Lifetime warranty • Referral program • Certified pre-owned vehicle management

Figure 8.3

Toward the end of the session, we had over 100 numbered ideas on a flipchart, which we narrowed to twelve to fifteen core ideas using dot voting and other prioritization methods, described earlier. We then developed these into written concepts and other stimuli for consumer feedback.

Step 6: Perform Concept Optimization.

The goal of Step 6 is to optimize concepts iteratively with target consumers. Prototypes, in the form of concepts, images, and models, are used to elicit feedback and get closer to the answer.

With our auto client, we developed ideas in two broad strategic areas. The first set of concepts focused on positioning the brand. The second focused on the two brands/one channel issue. Here is an example of a positioning concept.

ABC BRAND. AN EVOLUTION TOWARD SMARTER LUXURY.

Most luxury automotive brands were born in the 20th century, so it's no surprise that they share a more traditional view of what luxury entails. And for many owners, it's all about status—an excessive price tag just to claim exclusivity.

ABC Brand was designed to provide an evolved luxury ownership experience for a new century, born from the belief that the fast pace of life today and technological advances have changed what a luxury vehicle can—and should—be.

ABC Brand prioritizes a smarter, progressive approach to luxury—from the way the vehicles look, to the way they drive, to the way they fit into your life.

The ownership experience has been completely redesigned to maximize your investment, respect your time, and ensure you enjoy all that your vehicle offers. Every ABC vehicle comes with the industry-leading warranty, including free routine maintenance for two years. When it's time for maintenance, a valet will bring a loaner to your door, take your car in for service, and return it to you when it's done.

ABC. An Evolution Toward Smarter Luxury.

Here are a couple of sample concepts used to assess the appeal of alternative sales channel and service concepts.

AT-HOME VEHICLE DEMONSTRATION

A sales representative will bring your vehicle of choice to you for a test drive at the time and location of your choosing, so there's no need to visit a dealership to experience it before buying.

VALET SERVICE

When it's time for service, contact your dealer, and a representative will come to you, pick up your vehicle, deliver a courtesy loaner vehicle, and return yours when it's ready.

Through our concept optimization research (CORE) process, we exposed these concepts and other stimuli to test for appeal, distinctiveness, and credibility. Ideas were shown one by one, then compared against the others.

Throughout the process, we worked with the client in real time to review and revise concepts. This included formal debriefs between consumer research sessions to change stimuli, with concepts added, deleted, and combined iteratively.

With fewer concepts, more time was spent in later research sessions probing details and support points. The result was a set of fully optimized concepts, further tested through quantitative research.

Step 7: Finalize, Launch, and Learn.

Upstream marketing is predicated on the notion of being "roughly right" instead of "precisely wrong" and also on Pareto's 80-20 rule combined with Parkinson's law. This same efficiency/effectiveness bias

applies to the final steps in the approach—developing and finalizing the strategic road map and preparing to launch and learn.

When creating upstream marketing plans and integrating with downstream efforts, ditch the 100-page annual operating plan that ends up in somebody's desk drawer. Instead, move to a rolling plan that is revised and reviewed monthly, using a four-page template to track SOA portfolio progress. The four-pager should include the following details about each SOA:

Page one: Describe the customer demand framework (*to whom* and *for what*), including details on the bull's-eye target.

Page two: On the left-hand side of the page, describe the situation-complication-resolution argument. On the right-hand side, present the concept description and visual cues to bring it to life. Answer the questions: What is the core idea, and its winning proposition?

Page three: For the SOA, describe the overarching objectives, supporting initiatives, and corresponding tactics. Figure 8.4 offers an example.



Figure 8.4

Page four: Detail who, what, when, and how much including a clear path that shows how to get from where you are to where you want to be downstream. Assign SOA owners, identify major milestones, and confirm the resources made available.

The four-page format forces focus on the most important strategy and plan aspects. At the same time, don't skimp on the rationale. Deep customer insight, including data from concept experiments, should be available in an appendix if someone wants to double-click on supporting detail.

READY. FIRE. AIM.

The final step involves launch and learn—or learn and launch? While some may argue for *even more learning*, leading with *launch* is intentional. With upstream marketing, the traditional directive—*ready, aim, fire*—is replaced with *ready, fire, aim*. In other words, calibrate with the market, launch, and then recalibrate based on market learning.

By now, you've studied the market, talked to consumers, iterated concepts, and answered what would have to be true. Is in-market success guaranteed? Of course not. Still, it's time to launch. For a couple of reasons.

First, business today happens in a blur. Wait too long, and the market moves on. Overanalyze, and it may be too late.

Second, consumers want early access. "You never get a second chance to make a first impression," was a famous tagline for Head & Shoulders when Tim and Kristin worked on the business. While it's a classic line, it's not that true in business today. Most consumers prefer to get an innovation sooner, provided there's a mechanism in place to give feedback if something goes wrong. Also, most business decisions are reversible, even after launch. So take advantage.

In the case of our automotive client, this involved confirming the value proposition, strategic positioning, brand tracking, and multi-year support plan.

As an update, the client successfully launched the brand, with an award-winning product and positioning, and continues to tweak its go-to-market strategy. Importantly, post-launch, the company is responding to market learning and refining its offering and marketing approach. This is consistent with launch and learn, the final—and ongoing—step in the seven-step approach to upstream marketing.

Would your organization benefit from greater focus on upstream marketing? We know it's a lot to take in: three upstream marketing principles, four strategic framing questions, six best practices, and a scalable 7-step process. The final chapter suggests ways to jump-start upstream marketing, including twenty questions to diagnose its impact.

QUESTIONS TO CONSIDER

1. Does your organization have a structured, integrated approach to upstream marketing?
2. Does the approach recognize and answer the framing questions—where to play, how to win, how might we, and what would have to be true?
3. Is the approach informed by insight, identity, and innovation principles and corresponding best practices?