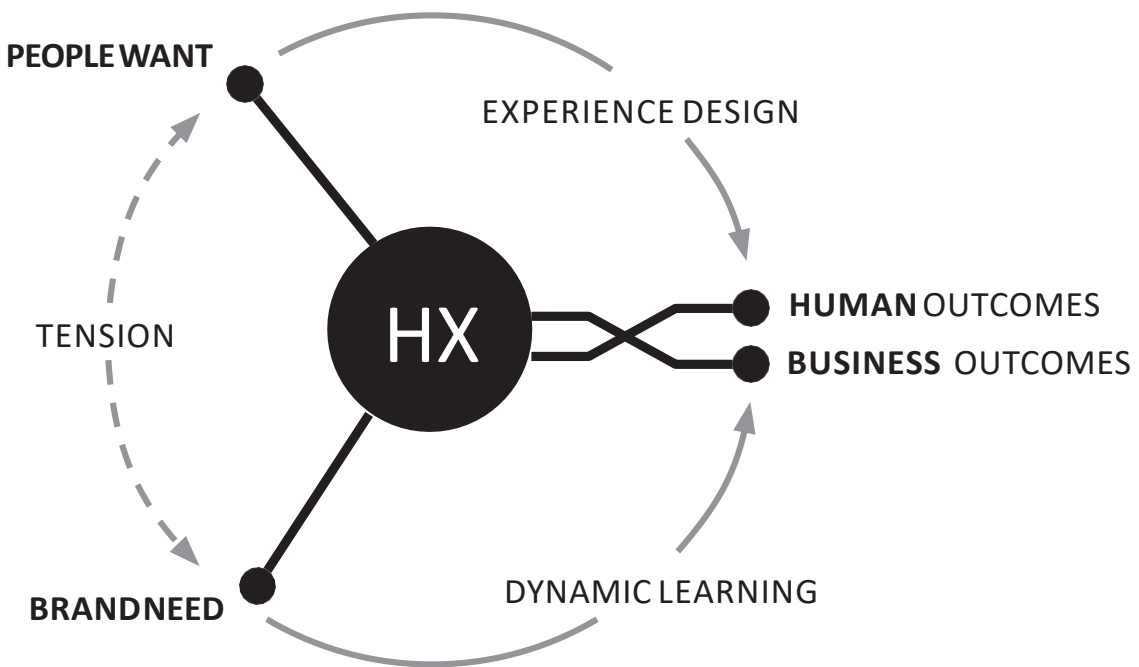




# HX 3.0

## PLAYBOOK





**DYNAMIC  
LEARNING**  
PHASE 1

# GATHER YOUR DATA & INFORMATION

## YOU SHOULD ALWAYS HAVE:

If you don't have this exact source, you must have something to proxy /answer that question



### **BUSINESS DATA**

Share, spend, sales & sales targets



### **COMPETITIVE DATA**

Media spend, sales, share, performance



### **BRAND HEALTH DATA**

Strengths, weaknesses, trending



### **AUDIENCE DATA**

Demographics, media consumption habits, segmentation



### **PAST & CURRENT CAMPAIGN**

Audience, channel, partner or creative information and learnings from previous campaigns at brand or client level including performance, best practices, research and measurement studies



### **SOCIAL & SEARCH**

Social listening, search, social behavioral (engagements)



### **CLIENT REQUIREMENTS/NORMS**

Mandatories, expectations, minimums, contractual requirements, negotiation requirements

## YOU SHOULD CONSIDER DEPENDING ON THE BRIEF:



### **LOCAL PERSPECTIVE**

Weather, traffic, economic, political



### **SHOPPER DATA**

Where and how people are buying



### **TRENDS**

Cultural trends, media landscape trends, i.e. CES, Mary Meeker, Viva Technology



### **MARKETPLACE CONTEXT**

What is new/popular/trending

# FORM YOUR HYPOTHESIS

	What we know [FACTS]	What we think we know [ASSUMPTIONS]	What we want to know [LEARNING]
Brand, Business & Category			
People & Their Behavior			
Channels, Commerce & Content			

# DYNAMIC LEARNING INITIAL MEDIA IMPLICATIONS

Based on your Dynamic Learning Hypothesis, what are the implications for:

Questions you have for your clients about the brief based on brand and category hypothesis?

Shifts to audience, channel or content for optimization or learning?

Any further research or data gathering needed?



BRAND  
**NEED**

# IDENTIFY THE CATEGORY CONTEXT

What is the real category that this brand plays/competes in?

How is your category traditionally defined?



How would you rearticulate your category based off what you have learned?



What other needs does your brand satisfy outside of the traditional category?

If people are leaving/using less of the category they are most likely going to...

# DETERMINE YOUR COMPETITIVE SET

Consider both close-in and distant competitors given the previous worksheet

Competitor Name	Why are they a competitor?	What are our strengths / vulnerabilities in relation to them?	What are they doing in communications?
Close In Competitors			
Competitors that satisfy similar needs			
Competitors in categories people are switching to / interested in more			

[Based on the above, what is your key competitive insight?]

# EVALUATE HOW YOU MEASURE UP VS. THE REST OF THE CATEGORY AND COMPETITION

## VISIBILITY

How visible is your brand to people vs. the category and competition?

Share of Voice

Share of Market

Aided Awareness

Unaided Awareness

## AFFINITY

How well liked is the brand vs. category and competition?

Positive / Negative press mentions

Ratio of Positive / Negative Sentiment

Likeability/overall appeal of the brand

## MOMENTUM

Is your brand on an upward or downward trajectory vs. the category and competition?

YOY Sales Change

Current Sales

Competitor growth

## ENGAGEMENT

Are people actively or passively engaging with the brand vs. the category and competition.

Search volume

Size of social communities

Social mentions volume

# GET TO YOUR BRAND NEED

Key Category Insight

Key Competitive Insight

How do we measure up against the category and competition?

The challenge or opportunity facing [The Brand] is...

What does the BRAND truly NEED to do to achieve business success?

The behavior that will best overcome the challenge is:

# BRAND NEED INITIAL MEDIA IMPLICATIONS

Based on your Brand Need, what are the implications for:

How much you need to spend in media?

The media environments/partners you might choose?

The key channels that need to be in your mix?

Any seasonal or geographic skews to your plan?

Other media implications?



# BUSINESS OUTCOMES

# IDENTIFY KEY SOURCES OF GROWTH

Category Consumption [DEFINE THIS]

Don't consume your brand

Consume your brand, but another brand most often

Consume your brand most often

Non	Light	Medium	Heavy	

Growth Audience 1

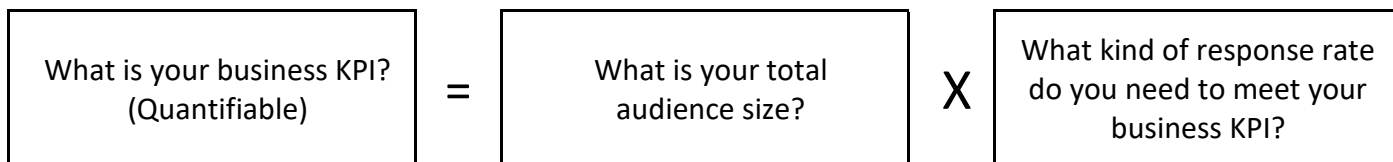
Growth Audience 2

Growth Audience 3

Growth Audience 4

# DETERMINE YOUR BUSINESS KPI AND AUDIENCE SIZING

Business KPI	
Media KPI	
What is the relationship between your Business and Media KPIs?	
What is your budget available? Is it enough? If not, what is required?	
What is your audience size or sizes?	
Is there enough growth potential in your current audience or do you need to look outside of them?	
What level of response or conversion do you need from them to achieve the desired outcome?	



# BUSINESS OUTCOMES

## INITIAL MEDIA IMPLICATIONS

Based on your desired Business Outcomes, what are the implications for:

How much you need to spend in media?

Whether you need multiple plans and experiences for multiple audience segments?

How will you measure the impact and performance of your plan against your KPI?



PEOPLE  
**WANT**

# PROFILE YOUR AUDIENCE(S) AND EXAMINE THEIR SIMILARITIES & DIFFERENCES

	Audience 1 Segment & Name	Audience 2 Segment & Name	Audience 3 Segment & Name	Audience 4 Segment & Name
Size				
Demographics				
Attitudes / Psychographics				
Category Behaviors				
Brand Behaviors				
Media Behaviors / Key Media Touchpoints				
Priority				
Different People Want or Same?				

# UNCOVER YOUR PEOPLE WANT

**What's important to them?  
What do they truly VALUE?**

In Culture		
In Life		
With the category		
With the brand		

**What MOTIVATES their  
actual behavior?**

In everyday life		
Within the category		
Related to the brand		
In Media		

**People really value**

--

**But  
So  
And**

**They are doing....**

--

**What do People really Want? (Distill the above into a provocative single thought)**

--

# UNDERSTAND HOW PEOPLE ARE SATISFYING THEIR WANT TODAY AND TOMORROW

(List out and plot behaviours related to shopping, researching, buying, using the brand & category)

Audience	What do PEOPLE WANT	How are they getting it	How are we measuring up and/or what opportunities does this present
<p> </p>	<p> </p>	<p> </p>	<p> </p>
<p> </p>	<p> </p>	<p> </p>	<p> </p>

**Mainstream Behaviours**  
(over 50% of the audience do these)

**Emerging Behaviours / Desire Lines**  
(think under 20% do these)

**Mainstream Behaviours**  
(over 50% of the audience do these)

**Emerging Behaviours / Desire Lines**  
(think under 20% do these)

# PEOPLE WANT INITIAL MEDIA IMPLICATIONS

Based on your People Want, what are the implications for:

The media environments/partners you might choose?

The key channels that need to be in your mix?

The types of content that will be most relevant to them?

Other media implications?

The background is a vibrant, abstract composition of overlapping geometric shapes. A large, central orange shape dominates the middle. To its left, a white shape with a sharp, diagonal edge cuts across the frame. Above and below the orange shape, there are sections of bright yellow and deep red, creating a sense of dynamic tension and movement.

**TENSION**

# DETERMINE HOW MUCH TENSION YOUR BRIEF HAS

Does the challenge exist within just your brand or the entire category?

Brand



Category



Is the challenge a marketing challenge or something fundamental (product, etc.)?

Marketing



Something Else



How easy is it to change people's behaviour in this category?

Easy



Hard



Is the solution within the current capabilities of the brand?

Yes, Easily



No, Significant Stretch Required



# IDENTIFY THE SOURCE OF TENSION AND ARTICULATE IT IN A STATEMENT

## What's really causing the friction?

What is the brand need?

What is the  
people want?

- People don't know about it (Lack of Awareness)
- I don't think it's worth the effort (Utility/Convenience)
- People aren't ready (Indecision/Commitment Issue)
- People don't get it (Lack of Understanding)
- I don't think it's worth the price (Price/Value)
- Want to try something new (Novelty Seeking)
- People don't know about it (Lack of Awareness)
- I don't think it's worth the effort (Utility/Convenience)
- People don't want to change routine/habit (Inertia/Avoidance) (Inertia/Avoidance)
- People don't think it's good enough (Unmet Expectations)
- It doesn't do what people want it to do (Functional Issues) Expectations)
- People aren't interested in it (Lack of Desire) (Inertia/Avoidance)
- People don't believe it (Lack of Trust)

## Tension Statement

# TENSION

## INITIAL MEDIA IMPLICATIONS

Based on your Tension, what are the implications for:

What media can reach the source of tension?

What media has the potential to both intersect and overcome the tension?

Based on the magnitude of tension, what are the implications for media planning?



**HX**  
**STRATEGY**

# CRAFT YOUR HX STRATEGY AND YOUR PLAN IMPLICATIONS

People Want	
The Brand Needs	
So We Will	
To Resolve the Tension	

## Bring the brand to people

[How you will create scale or improve brand visibility]

## Bring people to the brand

[How you will reach your audiences in specific times, spaces & places]

## Improve the brand experience

[How you will give people what they want through mainstream and emerging behaviors]

## Harness the interest / love / action / interaction

[How you will create advocacy, CRM capture, collect data for remarketing, etc.]

# ELEVATOR PITCH

**How has this strategy changed your audience approach?**

**How has this strategy changed your channel mix?**

**How has this strategy changed your approach to content and ideas?**

**How has the strategy changed your buying or tactical goals?**

# HX NEXT STEPS

Based on your HX Strategy, what are the implications for:

Using the Elevator Pitch worksheet to drive key inputs for scenario planning, HXP or other?

Articulating your jobs to be done to be shared with wider team as presentation or briefing documents?

The background consists of several overlapping, angular geometric shapes in shades of orange, yellow, and red. A prominent white shape, resembling a stylized arrow or a large 'L' rotated 45 degrees, points towards the center-right. The text 'HUMAN OUTCOMES' is centered in the middle-right area of the composition.

# HUMAN OUTCOMES

# WHAT VALUE WILL WE GIVE PEOPLE? HOW DO WE WANT THIS TO MAKE PEOPLE TO FEEL? WHAT DO WE WANT PEOPLE TO DO FROM THIS?

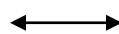
What value will we give people?

- Social currency
- Confidence
- Simplicity
- Information
- Status/prestige
- Self expression
- Money saved
- Entertainment
- Ability to learn or get better at something
- Inspiration/Ideas
- Ability to help others
- Reduced friction
- Time saved
- Attractiveness to others
- Ability to connect with others
- Anticipation/savoring of an experience



How do we want this to make people to feel?

What do we want people to do from this?



- Buy
- Try
- Use
- Buy More
- Visit
- Use More
- Share
- Like
- Change (perceptions)
- Consider
- Prefer
- Research
- Evangelize
- Test Drive
- Spend Time With

# HUMAN OUTCOMES INITIAL MEDIA IMPLICATIONS

Based on your desired Human Outcomes, what are the implications for:

Content that will bring them value?

Key engagement mechanics, media functionality or innovation needed to deliver that value?

How will you measure both how you want to feel and what you want them to do?



# EXPERIENCE DESIGN

# CREATE YOUR EXPERIENCE IDEAS

## Experience Idea



**What are we going to DO?**

[Connect this with your JOBS TO BE DONE]



**How will people PARTICIPATE?**

[Connect this to mainstream/emerging behaviors and what PEOPLE WANT]



**Why will people CARE?**

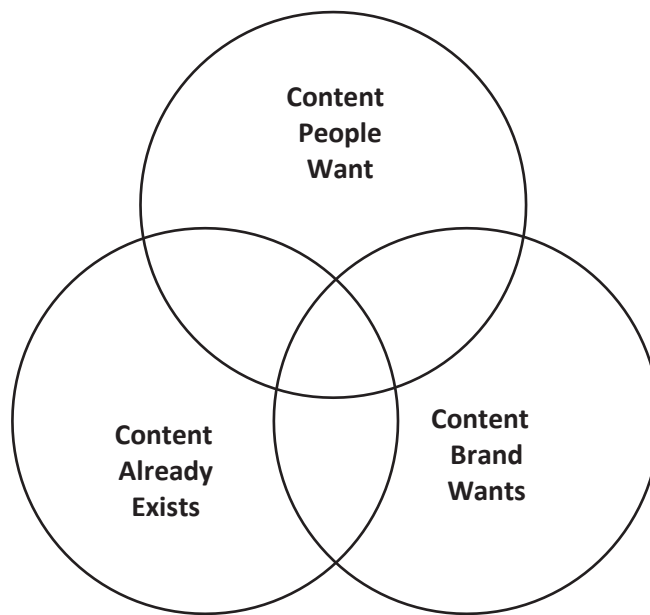
[Connect to your HUMAN OUTCOME]

# AUDIT THE CONTENT YOU HAVE AND THE CONTENT YOU NEED

LIST CONTENT YOU NEED

Improve What  
Exists

Avoid This



Make this first

License This

LIST CONTENT YOU HAVE

# IMPROVE THE COMMERCE EXPERIENCE

**WHERE** are people currently shopping for your category and brand?

**CREATE** commerce where it doesn't exist

**ENHANCE** existing commerce experience

**HOW** are people currently shopping for your category and brand?

**WHAT** can your Experience Idea do to...

**CONNECT** better to existing commerce experience

# CREATE CONNECTIONS THAT SATISFY YOUR JOBS TO BE DONE

**Bring the brand to  
people**

**Bring people to the  
brand**

**Improve the brand  
experience**

**Harness the interest /  
love / action /  
interaction**

[How you will create scale or  
improve brand visibility]

[How you will reach your  
audiences in specific times,  
spaces & places]

[How you will give people what  
they want through mainstream  
and emerging behaviors]

[How you will create advocacy,  
CRM capture, collect data for  
remarketing, etc.]

**Channels /  
Touchpoints**

**Ideas / Actions**

**Budget %**

# EXPERIENCE DESIGN MEDIA IMPLICATIONS

Based on your Experience Design, what are the implications for:

Having a clear Experience Idea that can be shared with internal, external, client and media partners?

Using HXP how can channels best be used to bring the experience to life?

Using your Content Audit, map your content needs to partners or production?

Propose which media will connect to and improve the commerce experience?

Using the Experience Design Connections Worksheet demonstrate how the experience lives within the total plan across channel, content and resource?



DYNAMIC  
**LEARNING**  
PHASE 2

# DEVELOP YOUR HX MEASUREMENT FRAMEWORK

## HX Strategy

--

## Human Outcome

--

## Business Outcome

--

### How should your measurement plan be architected?

#### Success Metrics

#### Optimization Metrics

#### Diagnostic Metrics

[Channel, Phase or Audience]
------------------------------

Sales, Conversions, Improvement in Brand Sentiment
--

Impression Delivery, Frequency, Cost Per XXX (ex. CPM, CPC, CPP), Viewability
---

CTR, Page Positioning, Verification Metrics (Brand Safety, Fraud), Completion Rate
--

--

--

--

--

--

--

--

--

# BUILD YOUR HX OPTIMIZATION PLAN

<b>Scenario</b> (Anticipating or controlling for)	<b>Metric / Indicator</b>	<b>Action to take</b>
[Experience performance. Are people participating how you want them to?]	[	[
[Brand safety or viewability scenario]	[	[
[Extreme positive / negative reaction in social or earned/owned channels]	[	[

# DYNAMIC LEARNING 2

## INITIAL MEDIA IMPLICATIONS

Based on your second Dynamic Learning module, what are the implications for:

Your measurement framework's deployment or needs from the media plan?

Based on the sequence or timing of your plan, when are these optimization scenarios intended to play out?