



The Delve Group, Inc.

Delve's Marketing Change Offering
Methodology/Framework

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Delve's Marketing Change Offering

Delve's unique Marketing Change offering is designed to ensure that organizations realize the desired results from their planned change. Using a creative approach, we lead organizations through change by leveraging their new vision, their brand, and their marketplace differentiators. Through open dialog, strategic positioning, visual tools, and a detailed six step process, we assist organizations in dramatically increasing their opportunities for success.

As the world continuously changes, prevalent approaches achieving and sustaining the results of a change initiative have proven to be too narrow. Many existing models do not incorporate strategic dialog, branding, and a communication campaign to help lead significant change. Today's sophisticated organizations are gaining a better appreciation that deliberate and innovative communications are a vital part in adapting to or changing the future.

Delve's Marketing Change offering distinguishes itself from the competition through the application of creative expertise in marketing, branding, positioning as well as communications messaging, tools, and mediums. Understanding the need to drive and communicate complex messages and educate employees at various levels across the organization, Delve combines strategic management, visual thinking, and communications expertise to deliver tailored plans that introduce more inclusive techniques that are designed to meet clients' goals.

By branding communications around specific change and strategic efforts, organizations ensure the message is differentiated from other standard internal communications efforts, and more importantly, aligns the internal messages to internal customers with the external messages and value proposition.

MARKETING CHANGE: Vital dialogue and innovative communications to achieve your change goals

1. DEFINE:

Define strategy, desired outcome, obstacles to success, and opportunities for improvement.

- **Participate in and observe early strategy discussions**
To successfully develop a tailored comprehensive plan, the process of assessing the needs of a Marketing Change offering must begin during the initial stages of strategy discussions, project planning, and implementation. The knowledge gained by strategy and communications professionals while participating in and auditing initial strategy meetings provides in-depth knowledge about the complexity of the change, the rationale behind decisions being made, and the most effective way to translate the business decisions into communications messages and vehicles that will effectively educate and involve employees, customers, and shareholders.
- **Define and articulate the vision and key messaging** around the strategy for change and intended business outcome
- **Define anticipated effect on employees**, both directly and not directly impacted by change
- **Define major challenges and obstacles to successful implementation** of Marketing Change communication plan.

2. DISCOVER:

Research gaps and opportunities from various perspectives and points of contact, including management, employees, customers, competition, market dynamics, and shareholders.

- **Detailed analyses of anticipated effect** of the planned change on employees, customers and the marketplace, incorporating anticipated challenges, obstacles, and opportunities.
- **Analyses of existing internal and external communications and marketing capabilities**, including current communication vehicles, employee perception, and employee engagement.
- **Gain a deeper understanding of the impact change** will have on corporate culture, social norms, market position, and customer experience.
- **Explore how employees of specific organizations, departments, levels, and job descriptions absorb information and react to various delivery methods.**
- **Analysis of employee statistics**, including demographics, technology used, and average tenure. Employee engagement tends to start high, taper off after two years, then rebound after about six years (The Conference Board, 2003).

3. DEVELOP/DESIGN:

Develop a comprehensive Marketing Change plan that addresses gaps and opportunities for each audience, uses creative thought processes and resources, streamlines information, educates employees, and increases understanding about the rationale and impact of change.

The Change Communication plan includes:

- Key messaging around and positioning of strategy and change plans
- Roles and responsibilities for all levels of management, including executive team members, senior management, and middle management
- Coaching plan for executive team, senior management and middle management on the successful delivery of key messages.
- Detailed marketing and communications timeline and schedule
- Design, development and launch of branded Marketing Change delivery methods, including branded e-mails, publications, materials, and meeting formats.

The complexity of the plan may vary considerably, based on the following:

- The organization's existing internal resources and structure
 - Internal communications
 - Technology
 - Facilities (location of employees)
- Awareness and engagement of current employees, management, and customers.
- Management's understanding and appreciation of the importance of their commitment and high level of involvement in implementing a branded change communications plan

4. DEPLOY:

The deployment of the Marketing Change plan will also vary based on the complexity of the plan and the organizations history, culture and internal resources.

Deployment may include:

- Tiered delivery of branded messaging
- Training of senior and middle management on the successful delivery of communications (based on research in 2006, employees prefer to receive communications from their direct supervisor)
- Message development, including writing and editing communications materials
- Regular distribution of communications materials (online, in-person, etc)
- Executive communications coaching
- Creating and managing open feedback channels with employees, such as online survey and feedback tools, firm wide and department meetings, and open dialogue with senior management
- Analyses of employee feedback
- Recommendations for adaptations to the plan to address management and employee feedback

5. DISSECT:

The fifth phase of the Marketing Change program begins as the communications plan nears completion.

- Gather data from management, employees, and customers
- Identify areas where the plan was most and least successful
Identify opportunities for further change or ongoing communications efforts

6. ONGOING DELIVERY:

Based on data gathered during the dissection phase, recommendations are made about the ongoing delivery of branded change and strategic communications.

Sample Marketing Change Plans:

Company A has a small existing communications group. The employees are not accustomed to receiving communications on a regular basis and are not informed of ongoing business decisions.

Project Phase	Tasks	Accountability	Timing
Define	<ul style="list-style-type: none"> Participate in strategy discussions and identify vision and key messages Identify communications and engagement opportunities, gaps, obstacles, etc. 	Delve Delve	Varies (based on time senior management spends discussing potential changes)
Discover	<ul style="list-style-type: none"> Interview senior management Examine customer and product reviews and market and business intelligence. Interview/survey employees Examine existing internal resources (communications, technology, facilities, etc) Analyze communications and engagement opportunities, gaps, obstacles, etc. Assess various communications delivery methods. 	Delve Delve Delve Delve / IC Team Delve	One to three months
Develop/ Design	<ul style="list-style-type: none"> Develop communications plan, key messaging, and detailed schedule Present communications plan to senior management Time delivery of communications around the implementation of change 	Delve Delve Delve / Senior Management	One to two months
Deploy	<ul style="list-style-type: none"> Detailed overview of key message and communication with senior and possibly middle management Train senior and middle management on the successful delivery of communications and preparation of the social and cultural nuances. Write, edit and product materials Initial ongoing delivery of all communications Train internal staff to manage ongoing development and delivery of communications 	Delve Delve Delve Delve Delve / IC Team	Six to twelve months
Dissect	<ul style="list-style-type: none"> Analyze the success of communications plan and employee engagement efforts 	Delve / IC Team	One to two months
Delivery	<ul style="list-style-type: none"> Develop ongoing communications plan Manage ongoing communications 	Delve / IC Team IC Team	Ongoing (Delve involved for one month)

Company B has a large existing Communications group and a solid relationship with internal marketing and sales teams. They have the internal knowledge and capability to implement a comprehensive communication plan over an extended period of time.

Project Phase	Tasks	Accountability	Timing
Define	<ul style="list-style-type: none"> Participate in strategy discussions and identify vision and key messages Identify communications and engagement opportunities, gaps, obstacles, etc. 	Delve Internal Communications (IC) Team Delve / IC Team	Varies (based on time senior management spends discussing potential changes)
Discover	<ul style="list-style-type: none"> Interview senior management Examine customer and product reviews and market and business intelligence. Interview/survey employees Examine existing internal resources (communications, technology, facilities, etc) Analyze communications and engagement opportunities, gaps, obstacles, etc. Assess various communications delivery methods. 	Delve Delve IC Team Delve/IC Team Delve/IC Team Delve/IC Team	One to three months
Develop/ Design	<ul style="list-style-type: none"> Develop communications plan, key messaging, and detailed schedule Present communications plan to senior management Time delivery of communications around the implementation of change 	Delve/IC Team Delve/IC Team Delve / IC Team / Senior Management	One to two months
Deploy	<ul style="list-style-type: none"> Detailed overview of key message and communication with senior and possibly middle management Train senior and middle management on the successful delivery of communications and preparation of the social and cultural nuances. Write, edit and product communications materials Initial ongoing delivery of all communications 	Delve/IC Team Delve IC Team (Delve overview) IC Team (Delve overview)	Six to twelve months
Dissect	<ul style="list-style-type: none"> Analyze the success of communications plan and employee engagement efforts 	Delve / IC Team	One to two months
Delivery	<ul style="list-style-type: none"> Develop ongoing communications plan Manage ongoing communications 	Delve / IC Team IC Team	Ongoing (Delve involved for one month)