THE TALE
OF THE SCRIPT: A GLOBAL COLLABORATIVE RESEARCH ADVENTURE

Lohs and Lindberg go on an international research journey and bring back archetypal answers to solve a qualitative mission impossible

Rome AQR-QRCA April 26, 2012
REASONS BEHIND THE STUDY

- International qualitative research is sought to *validate* a new architecture for an iconic brand

- Reverse the brand’s dwindling identity in an ever-expanding digital world

- Ensure integration of the brand’s product lines

- Help the brand reach global potential and grow its equity internationally
PLANNING THE IMPOSSIBLE QUEST

- Let’s repeat! Our objectives are deep and rich
  - But decidedly **un**qualitative
  - It’s **validation**…quant. Not exploration…qual

- We qualitative researchers must return from around the world, confident...

- …that one compelling architecture can activate the brand’s future + unite all global businesses

- Findings must reflect depth of motivation

- With ironclad methodological consistency
THE PROJECT: MULTILAYERED, COMPLEX

- 24 in-person focus groups
- 8 global markets
- 5 international moderators plus Lohs-Lindberg
- 5 months to plan, execute, analyze, present
- 23 stimulus elements + 5 projective exercises
- Culturally viable across the globe
TRULY GLOBAL

Chicago

Paris

Warsaw

Hamburg

Shanghai

Shenzhen

Delhi

Mumbai
A COMPLEX, MULTILAYERED METHODOLOGY

1. B2B and consumers -- totally different needs
2. Aspirations for future
3. Archetypes
4. Mission statements
5. Benefit words: Functional + emotional
6. Symbolic brand personas
7. Blind vs. branding
8. Building block process
9. Bull’s-eye wrap-up
10. Charged with archetypes from start to finish
Using archetypes in a quali-quant effort?

It can be done...using precision and creativity
TEAM CHOOSES 5 POSSIBLE ARCHETYPES FOR THE ICONIC BRAND’S FUTURE, GLOBALLY

- Collectivity, social, belonging
  - Caregiver-Nurturer
  - Trickster-Jester
  - Advocate

- Individualism, independence, personal self
  - Magician
  - Creator-Storyteller
  - Sage-Mastermind
  - Superhero-Champion
  - Rebel-Outlaw

- Risk, mastery, and activation
  - Muse
  - Guide
  - ChangeMaster
  - Underdog-Sidekick
  - Revolution

- Safety, security, stability
  - Ruling Power
  - Lovers-Siren
  - Innocence
  - Dreamer

Quadrants:
- Quadrant 1: Caregiver-Nurturer
- Quadrant 2: Trickster-Jester
- Quadrant 3: Magician
- Quadrant 4: Creator-Storyteller
Five separate archetypal mood boards are created and first explored in the U.S. to test resonance and power.
CAREGIVER/NURTURER

Key principle: Nurture and grow
Key principle: Create your story
Key principle: Inspire and guide
SAGE/MASTERMIND

Key principle: Learn and discover
MAGICIAN

Key principle: Transform and reinvent
These five archetypes are made appropriate to global markets. We change key cultural symbolism for each country.
HOW ONE ARCHETYPAL BOARD IS CHANGED--IN A SUBTLE WAY--TO DEPICT KEY SYMBOLISM WITHIN CULTURES

Creator-Storyteller changes more for China than other countries
THREE MISSION STATEMENTS IN LAYERS MUST BE VALIDATED AND PRIORITIZED

- **Base Mission G**: Expanding the power of communication for a more connected world

- **Alternate Mission K**: Expanding the power + simplicity of communication for a more connected world

- **Alternate Mission N**: Expanding the power + productivity of communication for a more connected world

  - G is always shown first. Order of K and N is rotated
  - Note: All statements begin with: “We are ____” (brand)
MISSION STATEMENTS ARE TRANSLATED FOR PRECISE MEANING INTO 6 LANGUAGES

**INDIA: HINDI**

G: अधिक जुड़े दुनिया के लिए संचार की शक्ति का विस्तार
K: अधिक जुड़े दुनिया के लिए बिजली और संचार की सादगी का विस्तार
N: अधिक जुड़े दुनिया के लिए बिजली और संचार की उत्पादकता का विस्तार

**CHINA: MANDARIN**

G: □□□□□□□□□□□□□□□□□□□□□□□
K: □□□□□□□□□□□□□□□□□□□□□□□
N: □□□□□□□□□□□□□□□□□□□□□□□

**POLAND**

G: Rozwijając moc i wydajność komunikacji dla bardziej globalnej sieci
K: Rozwijając moc i prostotę komunikacji dla bardziej globalnej sieci
N: Rozwijając moc i wydajność komunikacji dla bardziej globalnej sieci

**FRANCE**

G: Élargissement de la puissance des communications pour un monde plus connecté
K: Élargissement de la puissance et la simplicité des communications pour un monde plus connecté
N: Élargissement de la puissance et la productivité des communications pour un monde plus connecté
15 BENEFIT WORDS ARE TRANSLATED, THEN MUST BE PROBED – WHICH BEST SUPPORT THE MISSION STATEMENTS?

**Benefit words in English**

- *Functional words*: Connectivity, Creativity, Knowledge, Productivity, Quality, Reliability, Simplicity, Versatility
- *Emotional words*: Compassionate, Confident, Optimism, Smart, Stylish, Trust, Valued

**Benefit words in Hindi**

- *Functional words*: कनेक्टिविटी, रचनात्मकता, ज्ञान, उत्पादकता, गुणवत्ता, वश्वसनीयता, सादगी, बहुमुखी प्रतिभा
- *Emotional words*: दयालु, विश्वास है, आशावाद, स्मार्ट, स्टाइलिश, ट्रस्ट, महत्वपूर्ण
WE OUTLINE THIS FLOW TO ACHIEVE RESEARCH GOALS

1. Starting the session: Think out of the box
2. What is your future? Free association
3. Choose from 5 archetypes to represent future partnerships, motivations
4. Reaction to 3 unbranded mission statements, monadic sequential: G begins; N then K vary
5. Prompts on 3 key phrases in missions
6. Voting on preferred mission statement
7. Build brand architecture with whole group
FLOW OF THE SESSIONS, cont

8. Key functional and emotional words: Discuss 15 words, prioritize with preferred mission statement

9. Brand equity scrap art collage: 2 competitors + brand

10. Open-ended: How feel when competitors, then iconic brand, is connected with preferred mission architecture?

11. Which of 5 archetypes best communicates the mission statement when branded with the iconic brand?

12. Bull’s-eye: How close does the iconic brand come to owning the brand architecture, in the future?

13. What actions does the brand need to own it?
AN EXECUTIONAL CHALLENGE

• **Yikes!** That’s a lot to do in 2 hours!

• How can we:
  - Effectively brief the global QRCs?
  - Help moderators perform at highest levels?
  - Guarantee *precise* execution?
  - Assure speed of archetypal understanding?
  - Deliver richness + consistency across cultures?
THE SCRIPT BECOMES THE UNEXPECTED SOLUTION

• We decide to depart from the traditional Topic Guide – which QRCs say is not a script
  • The typical guide often is an outline of key issues, question areas. It’s flexible/not highly structured. Timing or probes change after a few sessions. Moderator uses her own words to ask questions

• But, for this project, we evolve the guide into a true Script – deep, descriptive, exacting, and repeated precisely throughout the entire study
THE SCRIPT BECOMES THE KINGPIN OF THE ENTIRE STUDY

• Rich and creative, yet highly structured
• Read exactly -- same sequence, same timing
• Unifies individual styles of moderation
• Makes projective techniques consistent
• Keeps the theoretical underpinnings of the archetypes easy for respondents to grasp
• Contains critical language elements readily understood within each language
• Allows creativity of probing by moderator
The Script

L/L/K
July 2011

V6. Revised 7-7-11
B2C/Consumers
Moderator’s Guide/Discussion Flow

Note: Please use in 2-hour long B2C quads. Timing is approximate, but please move process along quickly.

[NOTE ON TIMING - SECTIONS 1 - III ARE TO BE COMPLETED IN ABOUT 30 MINUTES]

I. Opening: Moderator encourages imagination and thinking out of the box, panelist introductions (10 minutes maximum)

Purpose: Intended learning: Train panelists in right-brain thinking, general orientation, respondent introductions, gain insights about what pictures mean to them.

Moderator explains the process ofquads: interactive, democratic, no dominators, no followers, build on each others’ ideas and opinions, be authentic, combine listening with expressing yourself.

Important: emphasize the use of your imaginative and emotional sides. In life, we know that, although a lot is based upon rational factors, creative, imaginative, and symbolic factors also are very important – and can make life more enjoyable! So, in this group, think out of the box. We will be emphasizing emotional words and pictures, analogies, and metaphors.

Moderator note: Throughout the quad, please remind the participants that the focus of the sessions is on the future (see below).

Moderator writes “Future” on the easel, emphasizing that -- once the group is past the warm-up phase -- most of the topics will concentrate on the future of brands and missions.

Introductions: Introduce yourself by a couple of things: 1) Name and a few quick headlines on you and your family, work, hobbies, and the world of your personal pictures. 2) Give us an imaginative, symbolic, or metaphorical book title that in a humorous or relaxed way describes what your area of focus of the research represents to you.

II. Warm-up: Future of pictures (5 minutes)

Purpose: Intended learning: Continue the warm-up and briefly hear some top-of-mind perspectives about the future of (subject area) in their lives.

Moderator note: Please keep the discussion moving very quickly. This is a very short warm-up discussion, to give everyone a chance to make a brief contribution. Please do not probe and please keep the pace moving! Get a list of free associations for the future to reference later.

- Go right into subject... Lot’s take it a little higher and talk about the future. What do you think is the future of (subject area)?
- Where do you think the (subject) is heading in the next 1-5 years?
- For this exercise: Moderator asks respondents to jot down on paper 2-3 short free-associations—quick words, phrases as headlines or book titles. Think between 1-5 years out. (Individual exercise. Moderator records words on easel. Do not probe but acknowledge that these words will be used as a springboard for how panelists feel about the future)

III. Exploring ways a “company or brand involved in (subject)” might work with people and (subject), using five different archetypal approaches (15 minutes)

Purpose: Learn: Understand which archetypes resonate with the respondents’ desires and needs in the next 1-5 years.

Moderator note: The goal is to learn where the participants are pulled from an “emotional” perspective -- what are their needs, wants, and desires relative to (subject) in the future. Again, the pacing is quick.

Move quickly through the introduction and explanation of the archetype boards, to allow more time for the respondents to select the archetype they resonate most with and to share their reasons.

- Quick explanations of archetypal mood boards: Reinforce imaginative thinking with respondents and intention of this exercise. I’m going to show you five different mood boards that represent an “archetypal” theme. (Explain, as appropriate, that these boards are not ads but five distinct ways of describing universal energy patterns and metaphorical themes. These boards are a collection of mood pictures and emotional, symbolic images that constitute feelings, needs, or stages in the life of a company, a community, a person, or a brand. Each mood board has a code name that gives a sense of its big theme, its universal energy, and its dynamic metaphor of patterns and motivations.) Moderator will vary her explanation throughout the group to indicate that the archetypal mood boards represent big themes, a collection of images that add up to one single metaphor per board, an “archetype” that is major in intensity, or an important, large vision in mood pictures for the future.

- Moderator continues...each of the five mood boards will look and suggest a very different archetypal or metaphorical theme and meaning -- through their individual style, content, and arrangement of its visuals. The collection of visual images on each board is meant to constitute a wide variety of different ways to dramatize the board’s overall theme. You may like some of the images on an individual board more than others. This is fine.

As you look at each board and listen to me give a few details about each one, please notice which one or ones you are drawn to when you think about what your own wants and needs from a company or brand (involved in the subject area) in the coming 1-5 years.

- Moderator explains each archetypal mood board one at a time with great speed. Our first board is called _ (Caregiver-Nurturer, Creator-Storyteller, and others below). Its important meaning is (Nurture and Grow, Create Your Story, and other titles below).

Moderator note: Please explain one board at a time. Do it fast. Do not seek reactions from the respondents until all 5 boards have been introduced.

- #32. Caregiver-Nurturer (Say: Nurture and Grow)
  - Caring, nurturing, helping you, your family and your friends through various lifecycles, putting you first, helping you and your family grow

- #86. Creator-Storyteller (Say: Create Your Story)
  - Creating and sharing stories – for your self, family and friends; helping you create and express the important stories of your life

- #79. Muse (Say: Inspire and Guide)
  - Inspires using strong guiding forces to create and enhance what you can do with (subject). Imagine this approach is like a muse who guides by their inspiring examples; you feel inspired and guided

- #41. Sage-Mastermind (Say: Learn and Discover)
  - A focus on intelligence and expertise. This archetype helps you learn and achieve knowledge... to think better and more powerfully.

- #50. Magician (Say: Transform and Reinvent)
  - Helps you make things happen. Helps you transform, reinvent, move with the times, undergo reconstruction or reinvigoration of your life
The Script continues...

• Helps you make your personal dreams come true relative to the important things in your life, from all the things that matter most

• Now that you have seen all 5 boards, ask yourself:
  o Even if you like several of these archetypal themes, choose which one board represents an approach or style that has the most meaningful value to you regarding you and your world of (subject area)? That you would want to use/work with/partner with with regard to (subject)? I want you to think about the future from 1 to 5 years from now.
  o Essentially, which one board makes you feel excited about the company/brand if this was their approach or style or they had to offer you as their vision for their future?
  o Moderator notes the number and name on the Easel. Probe why quickly. Why is this archetype mood board resonating with you and your thoughts about (subject) in the future?

**Moderator note:** If time allows, please pass around the 5 boards and ask each respondent to select one imago from their favorite archetypal board that is most powerful and resonating for them, personally. Why that image?

I. Validation exercise 1: Unbranded mission statements (30 minutes)

**Purpose, learning:** Panelists react to 3 alternative mission statements. Select the one statement that has the strongest appeal and resonances.

**Statements explored in this section:**

Mission Statement 1:  
*We are x, Expanding the power of communications for a more connected world.* (G)

Second option, Mission Statement II (Notice addition of “and simplicity”)  
*We are x, Expanding the power and simplicity of communications for a more connected world.* (K)

Third option, Mission Statement III (Notice addition of “and productivity”)  
*We are x, Expanding the power and productivity of communications for a more connected world.* (N)

**Note:** Moderator always will expose panelists to Mission Statement I first. Presentation order of Statement II and III will be rotated from group to group.

**Objectives and process:** Explore reactions to the 3 mission statements. G is always first. K adds in And Simplicity. N adds in And Productivity. K and N will alternate after G

**[TIMING - DEVOTE ABOUT 15 MINUTES TO THE FIRST MISSION STATEMENT (G), THEN SPLIT REMAINING 15 MINUTES EVENLY BETWEEN 2ND AND 3RD STATEMENTS]**

**Moderator note:** Please help the respondents understand that the mission statement is not advertising, but rather a set of guiding principles that a brand of company shares with the world. See below

• Brief introduction to the concept of a “mission statement” – a set of guiding principles for a brand or company that they wish to share with the world. Is anyone here familiar with that term? Know of a mission statement for a company or brand? Really quick (move on...) Well, just to reiterate, a mission statement is what the company stands for ... it’s a statement of guiding principles that it wants to share with the outside world. The mission is the company’s vision and mission. It is not an ad, a slogan, or a logo but a set of guiding principles of what it stands for ...

• Show Mission Statement I (G). *We are x, Expanding the power of communications for a more connected world.*  
1. Ask panelists to jot down three things: 1) What is it communicating? What is its main point? What does it say and mean to you? 2) A 1-10 rating (10 is high, 1 is low, that gives a sense of its personal appeal and relevance to you for the future) 3) Words that are especially important or evocative to you

2. Explore each participant’s thoughts on the mission statement. Then, ask a few of these questions to gain a richer understanding of panelist response to it

  a. What vision or mission does this brand appear to have for you? How do you feel about this company/brand’s mission for you? Why?
  b. What words on the mission statement most attract your attention and reaction?
  c. Likes? Why?
  d. Any dislikes or disconnects? Why?
  e. How important or relevant is it to you for the future? Why? Does it resonate with you for the future? Why?

3. Probe very thoroughly on “Expanding.” What does expanding mean to them? If I had never heard this term before, how would you explain it to me? Do you ever use the word “expanding”? How? If no, why not?

4. Probe very thoroughly on “power.” What does power mean in this context? When you hear the phrase, what do you expect to get? If I had never heard this term before, how would you explain it to me? Do you WANT power in this context? (More probes were included here)

5. Then probe “for a more connected world.” How do you feel about the phrase “for a more connected world”? Does the sentiment resonate? What does it mean? What is its relationship with your world? (More specific probes were included here)

6. What type of brand or company would choose this statement as its mission? A fill-in-the-blanks exercise: This statement implies a brand that is ____ , ____ , and ____ . Why?

  a. Which brand does this mission statement feel like?

**Moderator note:** Please rotate the presentation order of Statements II and III between the groups. Ask the backroom client team for rotational order before group starts

• Show Mission Statement II (K). *We are x, Expanding the power and simplicity of communications for a more connected world.* (As much as you are able, please forget that you’ve seen Mission Statement I.)

  As we did for the first mission statement, please jot down three things: 1) What is it communicating? What is its main point? What does it say and mean to you? 2) A 1-10 rating (10 is high, 1 is low, that gives a sense of its personal appeal and relevance to you related to you for the future) [When finished, write on Easel and discuss]

**Moderator note:** Please reinforce to the participants that you are interested in hearing what is true for them personally, and not just their opinions on how people in general might react and feel

• Continue discussion, listening to answers to the following questions and probing as appropriate. Goal is to clarify reactions to the addition of “and simplicity”
...and, continues

a) What vision or mission does this brand appear to have for you, personally? How do you feel about this company’s/brand’s mission for yourself? Why?
b) Do your reactions to the statement change when “and simplicity” is added?
c) What does “and simplicity” actually communicate?
d) Is “made simple” a positive? Why?
e) Are there any negative associations?
   • Listen for or explore subtly: Does “simple” mean “cheap”? Does the phrase
cause people to feel “talked down to,” as if they aren’t smart enough and have to
have things “dumbed down” for them?
f) Is there a word or phrase that would be more appealing and compelling than “and simplicity”? How should the phrase be changed to make it more relevant and
powerful for you?
g) Which brand does this mission statement feel like? The same one(s)? Has this
changed why?

Again, try to forget the first two. React to the third on its own merits. We’ll compare all 3 at the end.

Show Mission Statement III (X): We are x. Expanding the power and productivity of communications
for a more connected world. (private reaction: 1-10, and key words noted on paper before discussion)
• What does “and productivity” bring to the statement?
• How important is the idea of productivity to you in your world of (subject area)? In the future?
• What does it mean?
• Explore this phrase very thoroughly.
• (If the phrase is not resonate with them, ask) Who would like the phrase “and productivity”?
• Is there a word of phrase that would be more appealing and compelling than “and productivity”? How
should the phrase be changed to make it more relevant and powerful for you and your
world?

Now we can compare and contrast. Ask panelists to select their preferred Mission Statement:
• Explore and compare all mission statements quickly. Now, which of the 3 missions resonates
and appeals most to you and especially for the future? Which gets you most excited about
the brand or company? Makes you want to do business with it? (Private vote) Why?

I. Validation exercise II: Functional and Emotional Benefits as they relate to the
preferred mission statement (20 minutes)

Purpose: learning: Panelists explore the Functional and Emotional Benefit words to determine which
words best convey/deliver the chosen mission statement.

For the next exercises, we’ll concentrate just on the preferred mission statement. (Moderator places
the winning statement in a prominent position in the room for the panelists’ reference)

Do 10 minutes for the Functional Words and 10 minutes for the Emotional Words

• Open-ended Benefits words: Let’s think more in depth this preferred mission statement: What
would a brand/company need to do, be, provide, or deliver … to make this mission true?
(Another way to ask it is, what would the brand have to be, do, or provide to really “own” this
mission statement?)
   o Open-ended. Identify words, benefits, actions, or characteristics, note on easel. (Please
do not probe. This is a very quick exercise - just to get a few open-ended thoughts. The
goal is NOT to build a new list of benefits)

Explore Functional Benefit words: Connectivity, Creativity, Knowledge, Productivity, Quality, Reliability,
Simplicity, Versatility. I have 8 words in packets that describe Functional Benefits. I’d

• like to get your reaction to them. (Moderator hands out individual packs of index-card-sized words
of the Functional Benefits)
   o Take off the paperclip and go through all the words. Ask yourself: What does this
company or brand have to do, be or provide to really make the mission statement come
alive … to own it. "Take the one that is most important for the company or brand to
defend/provide to make the mission statement come alive. Put that one on top. Then
take the one that is next most important, and so on until you have rank-ordered all 8
words.
   o Do it fast. Just your quick gut reactions.

• Moderator will probe words chosen words. Take a few of these questions as appropriate:
   o What does this word mean?
   o How does this word support the mission?
   o Why is it important for this brand to provide it?
   o What is its essential connection to the mission statement?
   o Why do you like the word? Why is it relevant or resonating?
   o If TIME ALLOWS – For the words ranked least important:
     • Why did this word rank lower?
     • Why doesn’t it support the mission statement?
     • Any suggestions?
   o As a group (vs. individually), please select the top 4 Functional Benefits that best
"deliver the promise" of the mission statement. Which words provide the greatest
confidence that the brand or company will deliver on the mission statement? Please get
up, go get the placards of your favorite words that support the mission, and put them
next to the mission statement board.

Moderator note: Please do not use the words “emotional benefits” with the respondents. This is merely
a label for the researchers.

• Explore Emotional Benefit words: Compassionate, Confident, Optimism, Smart, Stylish, Trust,
Wanted: I have 7 words in packets that describe how people who enjoy (subject) might feel if a
company or brand truly delivered the Functional Benefits that we’ve been talking about.
(Moderator hands out individual packs of index-card-sized words of the Emotional Benefits.)
Please look through the stack of cards and select the one that most closely describes your
“frame of mind” if you and your family got these Functional Benefits. Then go through the rest of
the words and rank order them.
   o Do it fast. Just your quick gut reactions.
   o Consider a Laddering exercise for any words that are powerful and dramatic. Quickly:
   o How does this make you and your family feel? How does this make you feel?
   o How does this make you feel?

• Moderator note: After respondents complete the exercise, ask them to name their top several
words. Probe the words, using “laddering questioning” to prompt discussion of the “higher-level”
Emotional Benefits, specifically “optimism.” If the word “optimism” is not mentioned by the
respondents, ask: “Is it possible that people might end up feeling a sense of optimism if a company
truly provided the most important Functional Benefits? Please explain.” Do the same for
“compassion” if you have time

• Other probes, as appropriate:
   o What does this word mean?
   o How does this word support the mission?
   o Why is it important for this brand to provide it?
   o What is its essential connection to the mission statement?
   o Why do you like the word? Why is it relevant or resonating?
   o If TIME ALLOWS – For the words ranked least important:
     • Why did this word rank lower?
...and, continues

- Why doesn’t it support the mission statement?
- Any suggestions?

- As a group, please select the top 2 (Emotional Benefits) that best “deliver the promise” of the mission statement. Which words provide the greatest confidence that the brand or company will deliver on the mission statement? Please get up, go get the placards of your favorite words that support the mission, and put them next to the mission statement board.

VI. Branding the preferred mission statement: Exploring brand perceptions and reactions vis-à-vis the preferred mission statement (about 25 minutes)

Purpose, learning: Panelists consider which brands can best deliver the chosen mission statement in the coming 1-5 years, explore reactions to (brand) and competitive branding for the mission statement

A. (1-3 minutes) Open-ended brand exploration:
- Thinking about the various companies and brands that are important to people and their pictures, which brand or brands are best suited to deliver on the mission statement in the coming 1-5 years? (Respondents call out brands, and moderator probes briefly to understand reasons. This is a short exercise, without depth of probing)
- (Listen to hear if [brand] is mentioned)

Moderator notes: Please continue to remind the respondents they should consider each of the brands relative to how they believe the brand will be in the future (its trajectory for the future 1–5 years from now, vs. its current brand essence/image).

For this section, you will be referring to [brand] along with 2 competitive brands. Reminder: [brand] will be blind throughout the quads. Please do not reveal – at any point in the group discussion – that [brand] is the sponsor of the research

B. (5-8 minutes, maximum. Very fast) Scrap Art exercise for brand imagery. During the exercise, keep pushing panelists to rip out images and place on Easel sheets, as follows, very quickly

- Let’s talk a little more about brands. In our focus group, we are talking about [mention [brand] and the 2 competitive brands]. In the next focus group, we’ll be talking about a different set of brands. Now, let me give you a little explanation of what a brand is for our discussion ... A brand is a universe of symbolic meaning. Brands have imagery, personality, etc.
- (1-2 minutes maximum) Quick example: imagine we’re doing a focus group on brands of cars ... give me what first comes to mind when you think of the brand Mercedes? What does Mercedes stand for or represent as a brand? ______ Now, let’s do it for Jeep Wrangler. What does the brand Jeep Wrangler stand for or represent? ______ How about Volvo? ______ (If time allows, moderator might ask quickly ... where is Mercedes the brand heading in the future? Jeep?) Does everyone understand what we’re doing here? Great!

Now, we’re going to use these color sheets (moderator gives respondents copies of the archetype sheets) for you to rip up and use as Scrap Art to create brand collages of meaning relating to each of the 3 brands. (Moderator writes the name of each of the 3 brands on the on the Easel, with plenty of space under the brand name for respondents to add their images). Everyone, please work very quickly. As a group, tear out images for each brand and glue them on the Easel with your glue stick by the corresponding brand.

- When they are done, take a few quick minutes to debrief the quick Scrap Art brand collages for [brand] and the competitive brands

C. (15 minutes) Reactions to a set of brand names associated with the mission statement:

- (Of the 15 minutes: 10 for [brand], 5 for remaining 2 brands) I’d like to get reactions to these same 3 brands we’ve been talking about as possible owners of this mission statement. (For each brand, moderator inverts the brand name in the mission statement and explores reactions to that brand. Reactions are explored one brand at a time.)

  o Gut reaction? How do you feel knowing it’s (name of brand)? Open-ended, then ask a few of these questions
    - Can this mission statement work for this brand now? In the future?
    - When the mission statement is associated with this particular brand, how relevant is the statement to you? To what extent do you personally relate to it?
    - To what extent does it make you want to do business with (this brand)?
    - How ... • Compelling? • Intriguing? • Ownable? • Unique/distinctive? (or does it sound like what other brands might claim or promise?)
    - Are some of the Functional Benefits an especially good fit with this particular brand? A bad fit? Please explain

  How about the other grouping of words, the ones about how you would feel it you got those Functional Benefits? Are any of those words a particularly good fit with this brand? A bad fit? Please explain

D. [Blind, do not let panelists think it’s [brand]] Special probing for [brand] branding:

  Moderator note: As mentioned, it is important to not reveal that [brand] is the research sponsor, so please “gently probe” to learn what the respondents feel the mission statement to be a sponsor of [brand] branding ... 

  o Helps [brand] differentiate itself from the brand Kodak once was?
  o Makes sense for [brand]?
  o Is credible? Do they believe [brand] could be and do it? Can [brand] deliver “intelligent imaging”? Why/why not?
  o Is the statement transformative for [brand]? How? Why?
  o Are there any problems/concerns/negotiate?
  o Explore perceptions of [brand] relative to the concept of “simple.” Do they have any associations with [brand] and “ease of use/making things simple”?

E. (7-10 minutes total): Archetype exploration for each of the brands:

As we’ve been imagining, each of the brands we’ve been talking about could represent its future mission with this mission statement. Each brand also could use any of these five archetypal ways to communicate the statement.

[NOTE ON TIMING - IN THE SECTION THAT FOLLOWS, PLEASE DEVOTE ABOUT MORE OF THE AVAILABLE TIME TO EXPLORING [BRAND] THAN TO EXPLORING THE 2 COMPETITIVE BRANDS]

(7-10 minutes) Archetypal mood boards: Put out the five mood boards

(Moderator begins with [brand], still blinded) Do you remember these visionary mood boards? Remember, they represent major metaphors, themes, and energies of how a brand might envision itself. You used some of the imagery from the scrap art. Now return to thinking about each brand as its own major theme (Repeat the themes quickly: Nature and Grow, Transform and Reinvest, Learn and Discover, Inspire and Guide, Create Your Story, how to review). We’re now going to put the archetypal mood boards along with the preferred mission statement and connect it with the 3 brands. Got it? Good. Here we go...
...and, continues through the Bull’s Eye conclusion

- (Use this language for question exactly!) Which archetypal mood board now most successfully communicates/illustrates this set of guiding principles when this is the preferred mission statement and is coming from this brand? [brand]? Think about the brand and your personal, family, life, and overall needs in the future.

  1. Why did you choose this archetypal theme? Explore.
  2. What would you expect if [brand] has this archetype illustrating or communicating the mission statement?
  4. What about the [Functional and Emotional Benefit] words that described what you felt a brand had to be or do to own the mission statement. Let’s look at a few words like optimism, compassionate, simplicity, quality, knowledge. Does optimism mean different things when it’s coming from [brand] and with the archetype board you selected for [brand] and the mission statement? What about knowledge? Quality? Compassionate? Do your choice of words shift? Explore.

Special probing for [brand] brand:

- While we are taking care to not overemphasize [brand], moderator will “gently probe” using the above probes as well as additional probing:
  - What does the archetypal theme (or themes) the respondents select for a [brand]-branded mission statement add to or suggest about the mission that’s new, deeper, or in addition to what they previously felt? (Probe to understand the emotional pull of the archetypal theme/s with a [brand] brand)
  - Listen for: How far does [brand] have permission to go? Can it go to Sage/Mastermind? Can it be Muse? Can it be Magician? Does it have to stay at Caregiver-Nurturer? At what point does the brand’s future tenacity/begin to cause new reactions in the respondents? Under which archetype does the [brand] mission statement seem to increase in resonance, relevance, credibility, and appeal? Which archetype seems to fit their personal picture needs for the future?
  - What “evidence” do they have about [brand] to back up their opinions, i.e., what do they know/have they heard about [brand] that causes them to say that/feel that way, etc.?
  - Will the combination of the mission statement and the archetype board(s) chosen to work most successfully for [brand] transform [brand] in a good way? Why, why not?
  - With [brand] in particular, emphasize that this entire exercise is future-oriented. What elements of the [brand] legacy/heritage are likely to impact the brand’s future? If respondents are negative to [brand], moderator will play the role “devil’s advocate” and ask them to call out [brand’s] strengths that the brand may be able to leverage and capitalize on in the future, as related to mission statement and archetype board(s)

- (Quick: After reviewing [brand], ask respondents which archetypal mood board most successfully communicates/illustrates the mission statement when the brand is [insert name of second brand]). Remind them to think about their [subject-related] wants and needs in the future. Repeat probes 3 through 4 above but very fast. Then do the same with the third brand, fast. If other brands seem to have stronger archetypes than [brand] or if [brand] has a stronger archetype than other brands, probe very gently what that “pull” is.

VII. Hitting the Bull’s Eye: How closely aligned is [brand] and the other brands with the mission statement connected with their archetype board? (5 minutes)

See Appendix on next page for visual exercise to recreate on Easel

APPENDIX - Bull’s eye exercise for Section VII

Place colored dots somewhere inside the circles to show how close you feel (the brand) has come to the bull’s-eye of the preferred mission statement and the archetype board that best fits it.
BRIEFING INTERNATIONAL MODERATORS WITH THE SCRIPT

- **Intros:** Arrive, chat, lunch, goals. Client states needs-to-know • 11 a.m. to noon

- **Lohs-Lindberg brief international moderator:** Go over details, process, timing of Script • Noon to 4 p.m.

- **Break:** International moderator integrates Script for herself • 4 to 5 p.m.

- **Groups:** International moderator conducts architecture groups with live respondents • 5:30 to 7:30 + 8 to 10 p.m.

- **Debrief:** Team identifies findings. Finetune Script process for Day 2 • 10 to 11 p.m.
THE SCRIPT IN ACTION ALLOWS CREATIVITY AND COLLABORATION...

Brand equity
scrap art exercise

Warsaw
The Script provides freedom and confidence...
The journey: Two lead researchers and Script
THE SCRIPT ENABLES CREATION OF A NEW BRAND ARCHITECTURE

Optimum mission statement is G

Magician is business archetype
Creator-Storyteller is consumer archetype

Three top emotional benefits enhance functional benefits: Trust, Confident, Valued

The mission delivers three top functional benefits:
Quality, Reliability, Creativity
The Script helps identify key cultural differences that the brand must assimilate into its new global identity
THE SCRIPT SHOWS THAT EACH CULTURE HAS A DIFFERENT FUTURE TRAJECTORY

Risk, manifesting, activation, integration, individuation

Collectivity, belonging, partnering, group

Safety and stability

Individualization, independence, personal, self
THE SCRIPT HELPS US DISCERN THAT OPENNESS TO THE ICONIC BRAND’S MISSION VARIES BY COUNTRY
THE SCRIPT’S PROJECTIVE EXERCISES SHOW WHERE THE ICONIC BRAND SHOULD CONCENTRATE ITS FUTURE EFFORTS

China is lower priority for brand expansion. Brand is “professional and caring, but not innovative”

India is high priority, a bright spot – “Brand can transform the world in its area of expertise”
THE SCRIPT’S BULL’S-EYE EXERCISE SHOWS WHICH COUNTRY BELIEVES IN THE MISSION

India expresses confidence that the iconic brand can do it

China believes the brand has key gaps to close first
BASED UPON CONFIDENCE IN RESULTS FROM THE SCRIPT’S ENACTMENT,

**MAGICIAN** PREDOMINATES
COUNTRIES INTENSIFY THEIR BELIEF IN THE NEW MISSION WHEN THE ICONIC BRAND BECOMES A MAGICIAN BRAND
FOUR GROUNDBREAKING OUTCOMES FROM USE OF THE SCRIPT

1. Qualitative research continues to be a journey of inquiry that ever expands, resonates, and deepens

2. The Script can become a Magician’s tool that transforms the traditional guide into international viability

3. Provocative findings can be confidently used without further quantitative validation

4. For special international research, we showcase a new, formal quali-quant methodology: True qualitative validation
The two qualitative collaborators…in reflection and insight

Hanummann temple, Delhi, India
An academically trained cultural anthropologist, experienced facilitator, and creative moderator with a passion for discovering what's going on beneath the surface, Ava Lindberg specializes in creative focus groups, brainstorming, creative ideation, cultural anthropology-ethnography, archetypal brand development, think-tanks, and strategic vision sessions.

Lindberg is President of SunResearch, a leading-edge qualitative research company located in New York City. For 20+ years, Lindberg has delved deeply into consumer behaviors, experiential-emotional need states, vision, brand imagery, and creative development as well as spearheaded innovative new forms of qualitative methodologies for leading brands and companies.
A cultural interpreter, Jan Lohs helps heighten clients’ understanding of our increasingly fragmented and complex world. Well grounded in traditional market research methods, Jan also stays abreast of current and emerging approaches to qualitative research design, facilitation, analysis, and reporting. She actively tracks advancements in brain science about how the brain processes information, makes decisions, and forms perceptions, and uses this knowledge to inform her practice.

Lohs is President of Lohs Research Group, a Chicago-based qualitative research consultancy that specializes in focus groups, individual depth interviews, and marketing-oriented ethnographic and immersion methods. She has been an active research consultant for over 20 years.