

The Social Venture Network Series

marketing that matters

10 practices to profit your
business and change the world

Chip Conley
Eric Friedenwald-Fishman



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10 PRACTICES TO
PROFIT YOUR BUSINESS
AND SAVE THE WORLD

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What is your definition of success?

PRACTICE 3—DEFINE YOUR GOALS

Smart businesses set tangible goals to guide their marketing strategies. They want to know which efforts are making a difference, if their dollars are being well spent, and how they can measure what works. Socially responsible businesses also want to know if they are making a difference in the world. Every business leader at some point asks, “What portion of my marketing dollars am I wasting?”

A more strategic view of the question is to ask, “How do I know that I am investing my marketing resources in a way that gets a return on investment?” You will note that our question asks about marketing *resources* rather than marketing *dollars*. This is because the actual investment in marketing is one of dollars and one of time, energy, and the focus of the people in your company. In this chapter, we explore the questions you can ask to set goals, and some of the measures you can use to leverage your marketing efforts.

Before we get into a discussion of the many typical marketing measures, it is useful to step back and consider that one of the great opportunities you have is to determine what you are going to measure and to set goals based upon your business

needs and values. In fact, the goals of socially responsible marketing often include a mix of traditional marketing and social impact measures. As we move through the discussion of goal definition, let's remember that advancing both your economic bottom line and your values are legitimate outcomes impacted by marketing.

A fundamental principle to start our thinking about goals is the truism What you measure matters. Certainly, both of us in our businesses have found that when we proclaim that we really care about something, the ability to measure it, track it, and suitably reward its advancement, makes our decision making much more strategic. This motivates our teams to focus. Before we delve into the rest of the chapter, here are a few examples from our own businesses.

In Chip's hotel company, customer satisfaction, customer suggestions, and customer experiences drive many of the business and marketing choices. It is feedback Chip's team measures and deeply values it. His company works with an outside customer satisfaction measurement group that monitors daily feedback from Joie de Vivre's hotel guests. This group, Market Metrix (a San Rafael-based company that conducts customer/employee satisfaction surveys), has studied data on hotels around the world. It has found that one particular measurement, the guests' perception of employees' can-do attitude, is the number one determinant of whether the guests were happy with their hotel experience—and whether they'll return.

So, while Joie de Vivre reviews all of the fifty measurement tools Market Metrix uses, Chip and his company pay special attention to the can-do score and have, in fact, created a companywide goal. If the company can average a can-do score of ninety-two for one year (which is at the "world class" index level of the top tenth percentile in the world), then Chip and his

two senior executives (who happen to be men) have to come to the next company holiday party dressed as the Supremes and sing “Ain’t No Mountain High Enough.” Throughout the year, Joie de Vivre reminds all of its employees of this goal and the fun payoff at year-end if they meet the goal. Even though seeing Chip and the gang in dresses is a good motivator, what is really important is setting a goal that will increase the number of return customers. So, for Joie de Vivre, creating and measuring a goal for great customer service is actually a key marketing goal.

At Metropolitan Group, Eric identified that contract acquisition and average account size matters to the company’s bottom line (a very traditional professional services marketing goal). However, this had not been measured as part of employee performance. When measures and rewards tied specifically to individual employee contract acquisition were added, there was a significant increase in new accounts, client renewals, and revenue. But there is more to the story. Eric and his team had refused to put this basic measure in place for nearly fifteen years because they felt it would undermine a core part of the socially responsible workplace ethos—the commitment to have a workplace that was a community. They had deep fears of creating internal competition and a “dis your neighbor” sales culture. So when they finally decided that they really needed to listen to the saying “what you measure matters” and put individual goals in place, they also launched a teamwork goal. On the same six-month time frame that new business bonuses are calculated, all employees complete a survey where they score each of their coworkers on a scale of 1 to 5 on four questions:

- Is he/she generous with his/her knowledge?
- Does he/she they give credit where credit is due?

- Does he/she do what he/she says he/she will do?
- Is he/she willing to jump in to help others?

The top ten percent of the teamwork scores also receive a bonus—because at Metropolitan Group, teamwork and culture also matter. The result? The contract acquisition numbers (measured with comparative data) and the esprit de corps (measured with a confidential annual all-employee survey) have both significantly improved.

Now, some of you may be asking what a teamwork goal has to do with marketing. The reason we view this as part of the marketing discussion is twofold. First, as we have discussed throughout the book, one issue for socially responsible businesses is a fear of marketing or a feeling that it is antithetical to social responsibility. Eric had that same fear but realized that socially responsible business leaders can set their own goals and their own rules. His epiphany: you could have sales goals and also motivate teamwork and community culture.

Second, for many service businesses like Eric's, the happiness of the employees and the workplace culture are critical parts of creating the customer experience that brings customers back and generates referrals. Customers are buying creative services (that rely on a team of professionals delivering a collaborative product) and trust in the expertise and mission-driven passion of Eric's team (which is directly connected to customers' experience and their relationships with the team). So Metropolitan Group is delivering on a value/values proposition—providing customers with a valuable service or product and delivering it in a way that values relationships and demonstrates commitment to the client's social mission. We will go into more depth about creating your value/values proposition in Chapter 6.

While the sales goals linked to teamwork at Metropolitan Group met two of their bottom lines (economic and great place to work), the company determined it could radically influence its third bottom line—social and environmental impact. The team members again looked at the saying “what you measure matters” and determined that they needed to set impact goals and link them to new business development efforts. They established a set of priority customer segments that would impact the issues, people, and communities that advanced their mission of “crafting creative and strategic services that help social purpose organizations create a just and sustainable world.” Metropolitan Group determined to exclusively focus on clients in the following segments: environment and sustainability, children, youth and family well-being, libraries and education, social justice, community development, public health, arts and heritage, foundations, and socially responsible businesses. Before expanding marketing resources, staff needed to demonstrate that the targeted client is in one of these segments and that Metropolitan Group’s work will either directly impact social change or build the client’s capacity to impact social change. The company assigns annual contract dollar goals to each segment to assure that advancing, its mission is meeting the company’s economic bottom line. Metropolitan Group also captures impact data from clients to measure the social and environmental results of its work. By setting a marketing goal centered on social impact, Metropolitan Group is able to drive audience segmentation and revenue goals.

So what you measure matters. How your business identifies the key areas that you will measure makes a major difference in your marketing choices and how you gauge success. Setting tangible goals allows your business to prioritize resources, empowers employees to execute and adjust strategies, and allows you to

be true to your core value/values proposition. By defining your own bottom lines and by designing your marketing approach to meet them, you can drive economic and mission results.

We have discussed ShoreBank's mission and brand in previous chapters, but turn to it again here as an example of an organization that uses many of the traditional marketing and business measures that one would expect of a bank—return on equity, profitability, and increased market share. ShoreBank has established and utilizes measures that are directly related to its social goal and advance its values proposition. For example, ShoreBank sets a goal of making sure that each year it delivers in development outputs (loans that fund community development projects in inner city neighborhoods) at least two times its equity capital. Ron Grzywinski explains, “ Our monthly snapshot shows earnings, development outputs, and environmental outputs compared to the budget. All employee bonus plans require employees to perform on the social/environmental impacts and on earnings. Our goal is to have new development outputs to be at least two times capital—last year it was 3.9 and has been consistently above the benchmark.”¹ ShoreBank's community development lending far exceeds the percentage of community development lending conducted by traditional banks to comply with the Community Reinvestment Act.²

Your business can design and implement your marketing to deliver value and values by blending the traditional value, profit, market share, and positioning goals that all companies should utilize in their marketing strategies, with your social, environmental, employee, and community relations goals.

Core Applications

We have identified three applications you can use to help integrate this practice into your business:

1. Clarify and codify your goals.
2. Identify your return on investment and advancement of mission expectations.
3. Reward and publicize the results that you value.

Clarify and Codify Your Goals

First articulate your big-picture goals and the specific outcomes that will demonstrate those goals are being achieved. Clarifying your goals will help you establish the decision-making infrastructure for a marketing program that delivers strong business and social results. Then, develop measurement and tracking procedures for the advancement of your goals. Codifying your goals will create accountability and provide the tools to monitor success.

The following are examples of traditional marketing goals:

- Increases in market share—For example, Rugmark (an independent nonprofit that inspects and certifies rugs as child-labor free) to increase the percentage of hand-tied carpets purchased in the United States that are certified child labor-free.³
- Comparative sales revenue growth (comparing time periods, locations, ratios to staffing, etc.)—For example, New Seasons’s goal of increasing per-store weekly sales.³
- Market diversification (expanding geography, demographic reach, customer segment reach, etc.)—For example, New Leaf Paper’s goal of garnering high-profile publishing and catalog accounts.⁵
- Increases or changes in distribution channels—For example, Joie de Vivre’s goal of increasing the percentage of bookings through its own Web site.
- Improved positioning (often measured by awareness and brand recognition)—For example, ShoreBank’s goal of

increasing its name recognition and brand awareness in Chicago.⁶

Socially responsible businesses often articulate nontraditional marketing goals. Such goals can include social and environmental impacts, changes in purchasing behavior, and attitudinal changes among customers (use of alternative transportation, increased use of healthy foods, use of energy efficient products, etc.).

For example, Flexcar provides easy access to new, well-maintained cars in various urban areas. Flexcar serves people who either do not own a car or are making the choice to utilize alternative forms of transportation for many of their trip needs and need a car that they can rent by the hour, hassle free.

Flexcar's core and driving marketing goal is to increase the number of customers (members) using Flexcar and in so doing decrease individual dependency on auto ownership. The non-traditional part of this very traditional marketing goal is that each time Flexcar increases its customer base; people's reliance on owning a car along with the ratio of perceived required autos per household goes down. This ties directly to Flexcar's values proposition: create an alternative to the single-user auto culture and its negative impacts. Flexcar is trying to reduce the significant ratio of autos to people in urban areas, a ratio that translates into congestion on urban streets and significant carbon output into the atmosphere. The Flexcar alternative can positively impact quality of life and improve air quality.⁷

Clarifying your goals also drives innovation and changes in business strategy. The Swedish appliance company Electrolux, one of the world's largest home appliance makers, has taken a holistic approach to environmental management. When it realized that the majority of its environmental impact was in the use of its products (not in the manufacturing process), it established marketing goals to drive increased product efficiency. Electrolux

measures the share and profitability of its total sales of environmental products compared to its conventional products.⁸ To further reduce its environmental impact, Electrolux has begun an experiment of giving away washing machines and charging customers by the load of laundry to promote more energy and water efficient customer use.⁹

Part of codifying your goals is to make them measurable. Establishing measurable goals for your marketing initiatives will hold you and your marketing team accountable for the choices that you make and will provide you with valuable data to adjust and improve your strategies.

gDiapers, a company that brought the first flushable diaper to the United States, is creating a significant environmental benefit by preventing tons of disposable diapers from ending up in landfills and putting human waste where it belongs—in the toilet. gDiapers established both market share goals and a commensurate goal for a reduction in tons of disposable diapers going into landfills. Its three-year goals were made clear and simple to measure. gDiapers plans to garner 0.5 percent of the U.S. diaper market and prevent over ten thousand tons of disposable diapers from entering the nation's landfills.¹⁰

Regardless of the specific goals you set, what is important to take away from this application is to make a practice of setting solid goals. Make sure your goals are

- Specific—Clear statements that outline what will be achieved or what will be different.
- Written—Easily shared with others who will be responsible for implementation.
- Measurable—Able to track progress and build data that can be used for comparative purposes.
- Deadline driven—To help keep you and your team accountable.

Identify Your Return on Investment and Advancement of Mission Expectations

We've used the term *ROI*, or return on investment, and while we believe most of you already have a clear idea of that term, the jargon buster definition follows: Return on investment is the aggregate impact (tangible return) to the company, business, or brand that is received in comparison to the amount of dollars invested in a particular marketing strategy or tactic.

A companion measure to return on investment is AOM, or advancement of mission. Advancement of mission is a way of creating benchmarks that demonstrate that the organization is advancing its mission, its values, or its social purpose in the world. The advancement of mission measures will be different for each business and often include both tangible and intangible returns. Ideally, the measures of AOM should be tangible, such as the number of calls made to congress via the socially responsible long distance service offered by Working Assets, and the amount of money raised to combat the environmental causes of breast cancer by Luna bar. ShoreBank, in the example above, linked an economic measure of loan production to advancing its mission of increasing the investment in underserved communities. In other words, as the amount of dollars invested in development loans increases, the availability of decent affordable housing, expansion of businesses that offer family-wage jobs, and the number of energy efficient buildings also increases in ShoreBank's communities. ShoreBank measures its advancement of mission by tracking its performance against development and environmental lending goals.¹¹

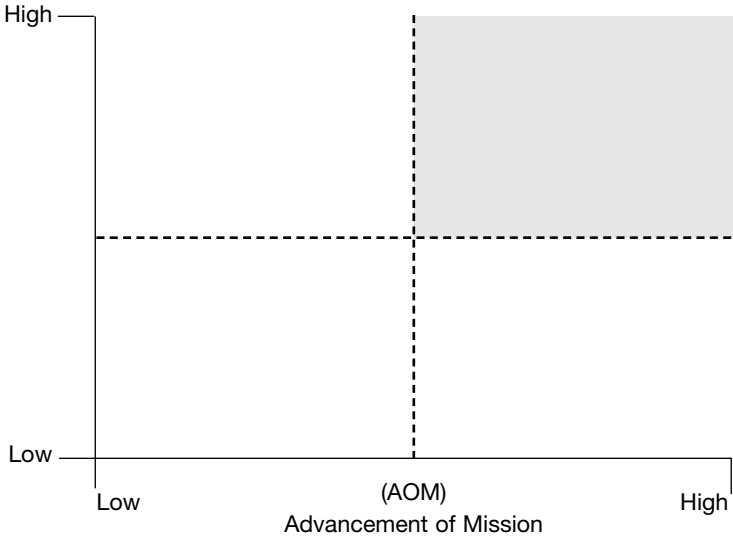
A traditional marketing exercise for most businesses when designing marketing strategies is to identify their anticipated return on investment and establish a system for measuring their actual results. Once you have identified your potential strate-

gies, take a step back and examine the potential investment (including hard costs and dedicated human resource costs) and the potential return (measured by revenues, the number of new customers, increasing account sizes, etc.) for each proposed marketing strategy. You can use the anticipated return on investment as a decision-making tool to select which strategies and tactics, out of a myriad of potential choices, offer the best investment of your time and money. For example, Eric's Metropolitan Group set and reached the goal of increasing its contract acquisition by 30 percent (about \$1 million) in 2005. He budgeted and spent approximately \$48,000 for the additional travel costs and billable staff time that was allocated to land the increased accounts. His return on investment was approximately \$952,000.

Once the selected marketing program is launched, measuring and tracking the return on investment based upon the actual results data helps you make decisions to expand programs that work and to reduce or curtail programs that don't perform.

As you focus on growing an increasingly socially responsible business, we encourage you to add questions to your traditional ROI analysis that will help identify marketing choices that will advance your mission. Ask yourself these questions:

- Does this marketing strategy align with our values?
- How will this marketing strategy advance our mission?
- Does this marketing strategy create social value (due to the expansion of use of our product or our service) in ways that have a positive impact in the world?
- Does the selected marketing strategy help expand service offerings and product availability into underserved markets?
- Does the messaging or the delivery mechanism (advertising, PR, etc.) help convey a positive social message and/or support a social cause?



This chart illustrates the conceptual positioning of the ideal marketing strategies for socially responsible businesses. The horizontal axis is advancement of mission; the vertical axis indicates return on investment. Clearly, the “sweet spot” for a business marketing choice is in the upper right quadrant, where you have both high AOM and high ROI.

An example of a marketing tactic in this sweet spot is the weekly conference call for Warm Spirit. Warm Spirit is a natural body care products company whose customer base is primarily African American women. Warm Spirit’s social mission is to empower African American women as entrepreneurs. The company’s primary means of distribution, in addition to its catalog and Web site, is a large network of twenty thousand consultants or associates—independent businesswomen who sell Warm Spirit products. For 2005, Warm Spirit set an aggressive growth goal of reaching \$10 million in sales. Its advancement of mission goal was to drive over \$5 million in earnings to its network

of consultants and develop the skills of these entrepreneurs. The goal was surpassed by over 40 percent.

Nadine Thompson, the cofounder, CEO, and president of Warm Spirit, cites her weekly conference calls as the firm's most important marketing investment that has also served to advance its mission. Nadine hosts a conference call every Monday that is open and voluntary to their consultants. The calls include product and company information, but they also teach skills and build community. Training sessions are offered on using technology, developing sales skills, self-care and wellness, spirituality, and business ethics. Every week three hundred to four hundred African American women call in from across the country and participate.

Warm Spirit receives terrific feedback from participants about the value and content of the calls. Since the calls are voluntary, recorded, and available 24/7 via phone and the web, Warm Spirit uses the consistent live participation measure as its indicator that the community created on these calls is meaningful to its consultants. But it is the tangible measure—that 75 percent of the company's total sales comes from regular participants of the calls and that, as a result, Warm Spirit exceeded its stretch sales and revenue sharing goals—that indicates to Nadine the high ROI and tangible AOM from this program. So this marketing activity, which has a very low dollar cost and a relatively significant time and attention cost from senior leadership, results in an extremely high ROI (dramatically increased sales and continued engagement of the highest producers for the organization). And it provides significant AOM benefits (driving revenue to women entrepreneurs and strengthening a network that builds life and business skills for Warm Spirit's core constituency).¹²

Needless to say, few marketing strategies are a perfect blend or an equal measure of both ROI and AOM. Often the right choices will offer high return on investment and good advancement of mission, or high advancement of mission and a solid

return on investment. The point is not to abide by some rule that all marketing choices and strategies of socially responsible businesses must fit in a particular quadrant of the chart. Rather, the point is to use this chart conceptually and ask yourself questions about ROI and AOM when you design strategy and evaluate results. If you do, you will make better choices to meet your combined goals.

Reward and Publicize the Results That You Value

A careful balance needs to be maintained when publicizing your company's business results, particularly your social responsibility results. Many organizations are rightfully cautious of communication that smacks of "green washing," or bragging or operating responsibly purely for the sake of image. At the same time, creating accountability for reaching your goals and sharing results with your shareholders, customers, employees, and community stakeholders can create a positive marketing and socially responsible impact. Making your goals and results known internally can motivate employees to achieve your marketing goals and create trust by reporting on your own accountability. Reporting externally can establish distinct market positioning, build trust with customers, and influence other businesses to adopt socially responsible practices.

When publicizing your results, identify which audiences make sense to communicate with on a case-by-case basis. Some goals may be appropriate to share with staff but may come across as spin to customers. Other goals can be shared with existing customers, in the form of additional information that reinforces their purchase choice, but are not appropriate for all stakeholders.

One of the factors that contributes to ShoreBank's positioning as a leading-edge triple bottom line company is its willingness to report its own progress toward mission performance.

ShoreBank profiles its development and conservation lending results and its profitability in internal updates, annual reports, online newsletters, and e-mail customer updates. This communication reinforces the choices that depositors and investors have made to do business with the company (as a customer, you receive a financial return and made a difference). Sharing achievement of its triple bottom line goals also provides a strong marketing platform to garner additional mission-based deposits and to strengthen ShoreBank's position as the leading community development bank in the United States and a preferred provider of community development consulting services on an international basis.¹³

gDiapers commits to its aggregate impact in terms of tons of diapers kept out of landfills and is creating a tool for customers to gain personal perspective on their environmental impact. The company is developing a web-based calculator for parents so they can see the amount of waste their family will prevent from entering landfills by their choice to use flushable diapers.¹⁴

In chapter 2, we highlighted New Leaf Paper's eco-audit program, a strategy that publicizes the environmental results and fulfillment of environmental goals for each client. By providing specific data on the positive environmental benefits for each sale of its paper, New Leaf reinforces the choice its customers have made to use its paper and provides for its customers a powerful marketing message that publicizes its commitment to environmental sustainability.¹⁵

Many companies include traditional marketing measures of sales, increases in revenue, and acquisition of new accounts as part of their reward and performance accountability program. Companies that integrate social and environmental goals into their marketing and business strategies can make the rubber meet the road by including advancement of these goals in their employee reviews and reward systems.

As you make marketing decisions, remember that by publicizing and rewarding your marketing goals, you can drive the results you value.

Stonyfield Farm offers a terrific example of the results that can occur by integrating top-level strategic marketing and social change goals. Its focus on increasing market share for its brand and for organic yogurt has advanced hand in glove with its goal of increasing the economic viability and number of farms that use sustainable and organic practices. Stonyfield not only holds the dominant market share in organic yogurt (75 percent in 2005) but also is the fastest growing of all yogurt companies. It has significantly expanded the organic and environmental sustainable dairy farming industry by building a supplier network of hundreds of farms, and it helps many conventional farmers convert to organic.¹⁶ Clearly, what you measure matters.

—NEW SEASONS MARKET—

DEFINE YOUR GOALS

One of the marketing goals of prime importance to New Seasons Market is its positioning as the ultimate neighborhood grocery store. This overarching goal has direct correlation both to creating a primary grocery shopping relationship with customers (rather than a specialty shopping relationship) and to reinforcing its brand position as local, local, local. New Seasons takes its community involvement seriously for many reasons. Like many socially responsible businesses, its primary motivation is to be involved in its community and be a good neighbor because it is the right thing to do. But because New Seasons recognizes that what it measures matters, it has made a number of choices that have helped drive its positive impact in the community and has made significant contributions to achieving its ultimate neighborhood grocery store positioning.

New Seasons knew that being a good neighbor requires more than writing a few checks. It recognized that it could leverage the large concentrations of neighborhood shoppers who view shopping at the store as an asset to raise money for community needs and to connect people with causes that are important to their neighbors. Enter the Benefit BBQ. Throughout the year, New Seasons partners with nonprofits that are important to the community. It produces benefit BBQs with the nonprofits to sell delicious BBQ lunches at New Seasons stores. New Seasons provides the publicity, setup, equipment, food, beverages, and staff to organize and manage the BBQ. The nonprofit partner provides volunteers to help serve and, to provide information about its organization, its projects, and important issues. The nonprofit receive 100 percent of the proceeds from the BBQs. New Seasons sets goals each year for the money its benefit BBQ program will raise and shares the results with the community. In 2005, New Seasons's BBQs raised over \$40,000; highlighted the work; and facilitated community connections for environmental, human rights, and educational community organizations. At the same time, New Seasons highlighted its values proposition for the beneficiary's members and like-minded community members through media stories, newsletters, and Web sites of its community partners.

As part of achieving its ultimate neighborhood store goal, New Seasons also sets goals for hiring from the local community. It establishes goals for each store and designs its recruiting efforts to utilize community partnerships via outreach through community and neighborhood papers and local job fairs to ensure that the staff has the perspective of the community. Brian Rohter points out, "One of our primary goals is to ensure that our staff in each store reflects the people living in the houses and apartments around the store. At a time

when we get four hundred to five hundred applications for every ten jobs, we made the decision to invest in a full-time staff recruiter whose primary job is to make sure our staff represents the diversity of our community.”¹⁷ This fosters an authentic connection to the neighborhood and reflects the diversity and culture of the store’s customers. For New Seasons, a traditional human resource and business goal has a major impact on its core market-positioning goal.

New Seasons designed its value and value proposition around a core brand position as the ultimate neighborhood market. By establishing priority goals for its community participation and hiring programs, and by measuring its progress against the goals, New Seasons Market drives community impacts that make a difference and create equity for its commonly centered brand position.¹⁸ What you measure matters.

Define Your Success

Setting your goals, making them measurable, identifying and tracking the return on investment, the advancement of mission with each marketing strategy, and rewarding and appropriately publicizing the results of your goals can help maximize your marketing impact. You can make your marketing more effective and efficient by harnessing the continuous learning and information provided by measuring results. Integrating traditional marketing goals with your social and environmental goals can actually distinguish and strengthen your marketing efforts and your brand. Defining your own measures of success that integrates all of your bottom lines reinforces your value and values proposition and creates greater alignment with your mission.

Now we’re going to focus on your most important relationship—the one with your customer—and how to build long-term connections by clearly addressing their needs, desires, and values.