



**INSIGHT REPORT**

# **Translating Brand Promises into Employee Behaviors**

**BEST PRACTICES FOR MAKING, EMBRACING, AND KEEPING  
PROMISES WITH CUSTOMERS**

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## EXECUTIVE SUMMARY

Temkin Group has found that the companies that deliver great customer experience use their brand as a blueprint for how they treat customers, which is why *Compelling Brand Values* is one of our four customer experience core competencies. Too often organizations put a lot of energy into communicating the brand externally, only to fall short on connecting employees to their role in keeping brand promises. And when employees aren't connected to these promises, they tend to be less proactive, to act inconsistently, and to care less about their work. In this report, we describe three steps that companies can use to translate their brand promises into employee behaviors: *Make promises*, *Embrace promises*, and *Keep promises*. To illustrate this approach, we share over 20 examples of best practices from companies including Anthem, A&W Food Services of Canada, the city of Centennial, Oklahoma City Thunder, and Quest Diagnostics. To evaluate how well your organization follows this approach, use Temkin Group's *Compelling Brand Promises Assessment*.

## EMPLOYEES ARE NOT CONNECTED TO THEIR COMPANY'S BRAND

A company's brand is more than just a collection of its logo, tag line, and advertising efforts. A true brand is what a company stands for, and it includes a set of implicit and explicit promises to customers. Temkin Group has found that the companies that deliver great customer experience use their brand as a blueprint for how they treat customers, which is why *Compelling Brand Values* is one of our four customer experience (CX) core competencies. As it turns out, this is the weakest of the competencies—only 8% of organizations consider themselves “very good” at it (see Figure 1).<sup>1</sup> What's holding companies back in this area? In our most recent assessment of CX competencies within large companies, we found that (see Figure 2):

- **Brands are not shaping how customers are treated.** Although 45% of respondents indicated that their company's brand is “always” or “almost always” translated into a clear set of promises to customers, we found that only 32% of large organizations “always” or “almost always” use their brand to guide how they treat customers or design interactions.
- **Employees' efforts are not connected to the brand.** Only 33% of respondents indicated that their company “always” or “almost always” encourages its employee to interpret how their efforts can reinforce the brand, which is still an increase of six points from 2015.
- **Companies are not measuring how well they deliver on their brand.** Only one in four respondents agreed that their organization “always” or “almost always” examines how effectively interactions live up to its brand values.

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<sup>1</sup> See Temkin Group Insight Report, “The State of CX Management, 2016” (June 2016).

- **Marketing efforts focus more on the outside than inside.** When we asked respondents about where Marketing puts its energy, only 15% of respondents indicated that their marketing function “always” or “almost always” markets as much inside the company as it does outside the company—a decline of three points from 2015. In fact, of the 20 CX activities we measured in Temkin Group’s *Customer Experience Competency & Maturity Assessment*, this was the least frequently practiced activity on the entire list.

## Weak Brands Lead to Disenfranchised Employees

When employees don’t fully understand (and buy into) the implicit and explicit customer promises that their company’s brand represents, it is impossible to expect them to keep those promises. When employees aren’t connected to these promises they:

- **Aren’t proactive.** Employees need to hear the same messages inside the company as they do outside the company. When employees get mixed messages from leaders, it’s easy for them to wonder what is really important to the company. This confusion over the company’s priorities can make employees much less proactive.
- **Act inconsistently.** When employees don’t understand what the brand is or how they should keep its promises with customers, they may end up working at cross purposes with the customer experience that the organization is trying to deliver.
- **Stop caring.** If employees believe in and care about the brand, they will work harder to align their behaviors with it. However, if a company doesn’t invest in connecting employees to its brand, they will often become dispirited because they know they cannot keep those external promises and could alienate customers.

## ORGANIZATIONS NEED TO MAKE, EMBRACE, AND KEEP BRAND PROMISES

Temkin Group defines a “true brand” as *the set of promises that an organization is committed to delivering to its customers*. These brand promises must be aligned with a company’s mission, vision, and organizational values (see Figures 3, 4).

In order for companies to live up to their brand promises each and every time they interact with customers, they must translate their brand and its promises into appropriate employee behaviors using a three-step approach (see Figures 5):<sup>2</sup>

- 1. Make promises:** Ensure promises are clearly and explicitly defined. Companies need to communicate how they will treat their customers by explicitly making promises that guide how employees will act.
- 2. Embrace promises:** Help employees understand their critical role. Employees have to understand and accept the brand promises in order for them to be fully embraced.

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<sup>2</sup> We examined the efforts of over a dozen companies and captured examples of how they are using this three-step approach to connect their employees to their brand promises. Companies interviewed for this report include Anthem, A&W Food Services of Canada Inc., ATB Financial, Business Development Bank of Canada, Brand Biology, Brand Pie, city of Centennial, Colorado, Cisco, Hagerty Insurance, Inward Consulting, McKesson, Oklahoma City Thunder, Quest Diagnostics, Root, TouchPoint Support Services, Safelite AutoGlass, and Sanofi Pasteur.

- 3. Keep promises:** Hold the organization accountable. Simply understanding the promises a company makes is not enough for employees; companies need to reinforce, measure, and sustain their efforts.

### **#1: Make Promises: Ensure Promises Are Clearly and Explicitly Defined**

Before companies are able to deliver on brand promises, they first need to formally define and share those promises inside their organization. This requires more than an academic exercise that results in a superficial rallying cry for employees. Instead, this process must deliver strong brand promises that are easy to remember and can guide employees through the many decisions they must make every day. To successfully make brand promises:

- **Define a strong set of promises.** Because brand promises affect how every employee in the organization does their job, it's important that they engender a connection across roles and levels. Hagerty Insurance's brand promises are articulated in *The Hagerty Way*, a set of maxims that guide behavior companywide. These maxims include sayings like, "We take care of each other first," and, "We focus on doing the right things the right way." To define these maxims, a cross-section of employees and leaders worked together to discuss the characteristics that describe the company at its best. The statements that came out of this group were then presented to company leaders during a forum. At this forum, they discussed each maxim and established unique definitions and behaviors that represented each statement.<sup>3</sup> The city of Centennial, Colorado—a relatively young city at only 15 years old—recognized that as it grew, it needed to deliver a consistent experience to its citizens. Its CX team worked with city leaders to use an employee-driven process to define a set of brand promises—which they refer to as *ONE Centennial Quality Service Guidelines*. To generate these brand promises, the city used a three-phased process that included input from the city's executive team, middle managers, and frontline employees (see Figure 6).
- **Clearly communicate promises across the organization.** Promises do not help the company if they are not widely understood by employees. To introduce its consumer promise, Anthem created a traveling interactive exhibit called *The Promise Room* that allows employees to enter five relatable health scenarios that its members face (see Figure 7). This exhibit uses virtual reality and large screen video to show employees both these real-life health scenarios and solutions the company is developing to improve its customer experience—all of which serve to give employees an up-close view of how important it is to live the consumer promise. At the end of the exhibit, employees are invited to "sign" a large touchscreen display to symbolize they have joined in the commitment to Anthem's members. To reach employees in locations not visited by the exhibit, Anthem created *Roadshow in a Box* leveraging some of the same virtual reality technology. Employees can also visit a dedicated online microsite where they can add their own answer to the question, "How do you think you are fulfilling our consumer promise?" Oxford Properties' brand promises are articulated in *The Oxford Commitment*. The company engaged both its senior executives and its site leaders in sharing the commitment with employees. Following their own training, site leaders led employee workshops in their locations using facilitation guides and other resources provided by the enterprise CX team. Site leaders also have access to an online

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<sup>3</sup> See Temkin Group Insight Report, "Lessons in Customer Experience Excellence, 2016" (January 2016).

community that provides additional resources and tools, like whiteboard videos and an employee video that capture real stories and convey the essence of the Oxford Commitment for employees.<sup>4</sup>

- **Instill promises in new hire onboarding.** As new employees join companies, it's important to expose them to the brand promises as they start in their new roles. At the start of every season, the Oklahoma City Thunder brings new employees up to speed and keeps returning employees' skills sharp by training them on the team's core promises and guest care tactics. New employees, or "rookies," are required to take part in a three-hour onboarding session about the Thunder's service values—known as *CLICK!*. After a summer off, its "veterans," the Thunder's returning employees, participate in a two-hour *CLICK!* recertification program, which focuses on what went well during the previous season, using metrics and customer feedback for support.<sup>5</sup> At Nordstrom's new hire orientation, instead of receiving detailed commands about how to deliver good customer service, employees are told stories that highlight the behaviors of fellow employees who live up to the Nordstrom brand.<sup>6</sup>

## #2: Embrace Promises: Help Employees Understand their Critical Role

It's impossible for employees to keep their company's promises to customers if they don't understand what those promises mean in their role and if they don't get support in their efforts to deliver on them. To embrace brand promises, companies should:

- **Translate brand promises into specific employee behaviors.** If an organization wants to create brand-enabling experiences for customers, it needs to help employees understand what they must do on-the-job to deliver on its brand promises. Quest Diagnostics' brand promise is "Action from Insight," which it brings to life through products and services, communications, environments, and employee behaviors. For employee behaviors, *Everyday Excellence* consists of five guiding principles that define how employees bring the brand to life (see Figure 8). The company recognized that employees were good at following the rules, but wanted to give them more control so they were better able to do things right and do the right things for customers. Starting with existing insights from its voice of the customer program, a cross-functional team crafted a set of promises and behaviors. Feedback from a pilot led the team to restate these as specific "I" statements to make them more personal and powerful. Following a broad roll-out of its *Everyday Excellence* guidelines, Quest Diagnostics now uses a leader-led, module-based training program to reinforce specific concepts and skills with leaders and employees (see Figure 9). Each module includes "common ground" topics that all employees learn, combined with "leader's choice" topics that leaders select based on what's most applicable for their teams. At the end of each module, leaders confirm that the team discussions have occurred to reinforce that excellence "starts with me." At Cisco, one of the key employee behaviors required to deliver on their brand promise is to communicate in language that is easy for customers to understand. To help employees embrace this behavior, the company created its *Winning with Words* training program. Cisco

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<sup>4</sup> See Temkin Group Insight Report, "Creating and Sustaining a Customer-Centric Culture" (September 2015)

<sup>5</sup> See Temkin Group Insight Report, "Introducing Employee-Engaging Transformation" (February 2014).

<sup>6</sup> Lencioni, Patrick M., "Make Your Values Mean Something." Harvard Business Review, July 2002. Accessed February 18, 2016 [hbr.org/2002/07/make-your-values-mean-something](http://hbr.org/2002/07/make-your-values-mean-something).

developed a training curriculum it can deliver virtually and is supported by guidelines and playbooks that have been translated into 14 languages. *Winning with Words* highlights examples of the language Cisco employees had typically used that customers didn't understand, and then it teaches employees to think about who the customer is, what they care about, and how the individual employee can connect with them and inspire them to act. Cisco made the content adaptable to help employees in a range of roles—from sales representatives to engineers who provide complex technical assistance – change how they communicate with customers.<sup>7</sup>

- **Train middle managers on how to reinforce brand promises.** Middle managers play a key role in guiding employees on a daily basis, so they need to be prepared and motivated to help employees embrace brand promises. ATB Financial's branch managers were one of the earliest audiences to get exposed to the company's new brand promises. When the time came to launch the new brand through a bank-wide livestream, middle managers were charged with leading local discussions with their teams immediately following the broadcast. Managers received a launch kit built around a series of questions to ask their teams, including, "What does the story mean to us? How are we already doing some of the things the brand story talks about? What does this change for us?"<sup>8</sup> TouchPoint Services makes it simple for middle managers to manage their daily operations by giving them access to patient feedback from daily reports, along with other operational metrics via an online dashboard. The company replaced cumbersome pre-shift meetings with *GoBEYOND LineUps*, which give managers the opportunity to discuss the brand promise, related metrics, and improvement opportunities with their teams (see Figure 10).<sup>9</sup> To ensure managers are helping employees express the company's brand promise through their behaviors, Quest Diagnostics added an *Everyday Excellence Index* into its existing employee engagement survey. The index questions focus on the five *Everyday Excellence* guidelines, which are the set of employee behaviors that bring its brand promise to life. These questions ask whether employees feel they are getting the information, training, and tools they need to be successful.
- **Incorporate brand promises into leadership competencies.** One trap that organizations fall into is focusing behavior changes solely on the front lines. This is particularly risky when it comes to brand promises, which need to guide decisions and actions at every level of an organization. To impact executives, companies should examine how its leadership competencies encompass the specific behaviors needed to model and reinforce the importance of embracing brand promises to the rest of the company. For example, if listening to customers is a key behavior to keep the company's brand promise, one leadership competency could be *maintain a deep customer focus*. Demonstrating this competency could be specified to include executives regularly calling out to customers and executives using customer data/insights to make decisions. Another leadership competency should put emphasis on the role of executives in reinforcing the importance of keeping brand promises. This competency can be demonstrated with executive actions such as

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<sup>7</sup> See CX Innovation Awards 2014 Winners accessed at [https://c.ymcdn.com/sites/cxpa.site-ym.com/resource/resmgr/2014MIE/2\\_Cisco.pdf](https://c.ymcdn.com/sites/cxpa.site-ym.com/resource/resmgr/2014MIE/2_Cisco.pdf) accessed July 11, 2016

<sup>8</sup> See Temkin Group Insight Report, "Activating Middle Managers to Drive CX Change" (June 2015).

<sup>9</sup> See Temkin Group Insight Report, "Creating and Sustaining a Customer-Centric Culture" (September 2015).

personally recognizing individuals and teams doing the right thing or actively coaching direct reports on their own performance keeping promises.

- **Embed brand promises into HR processes.** It's easier to sustain the behaviors needed to embrace brand promises over the long-term if these promises are integrated into core HR processes—like hiring, performance management, and employee feedback programs. Safelite AutoGlass strives to deliver “service so great, it’s memorable.” To enable the organization to keep this brand promise, it looked closely at its HR processes to make sure they support what the company is trying to accomplish. Safelite started by identifying the core competencies that define the knowledge, skills, and behaviors required by each level of employee in order to deliver its desired results. All associates receive a *roadmap* describing these competencies and expectations by level. Safelite also offers monthly e-learning courses to all employees to help them develop their understanding of the core competencies.<sup>10</sup> SunPower has trained all of its hiring managers on behavioral interviewing techniques, and its job description templates include language about the importance of customer experience. The company challenges hiring managers to specifically define the customer experience they expect each role to deliver, thereby making it clear to potential job candidates exactly what behavior standards their performance will be measured against.<sup>11</sup>

### #3: Keep Promises: Hold the Organization Accountable

To make sure that employees are consistently keeping brand promises, companies should:

- **Track and review goals for keeping brand promises.** To ensure that brand promises remain a central area of focus, companies should be sure that the importance of keeping them is reflected in their overall company goals. Hagerty keeps everyone in the company engaged in its brand promises—known as maxims—by maintaining a cadence of *Quarterly Rollouts* and monthly updates. The centerpiece of the *Quarterly Rollouts* is the *One Page Plan*—the company’s version of a strategic plan—which includes *The Hagerty Way* maxims along with the company’s primary long-term goal, three- to five-year objectives, annual milestones, and a series of metrics measuring progress (see Figure 11). Hagerty shares this plan with every employee, so that all employees understand what the company’s top priorities are. Each month, Hagerty updates the plan and the metrics for the entire organization.<sup>12</sup> To reinforce the importance of its consumer promise and its efforts to become more consumer-centric, Anthem includes a CX goal as part of its annual incentive program for employees. In addition, each executive leadership team member has a consumer-centricity goal as part of their individual performance plan and has assigned a CX goal to their team to ensure his or her area is executing on key strategies that support CX efforts. Finally, CX goals have been cascaded to individuals accountable for delivering critical CX deliverables in operational processes and to Anthem’s CX ambassadors.
- **Ask customers how well they think you’re delivering on your promises.** The only way for a company to know whether or not it is keeping promises with customers is to

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<sup>10</sup> See Temkin Group Insight Report, “Creating and Sustaining a Customer-Centric Culture” (September 2015).

<sup>11</sup> See Temkin Group Insight Report, “Lessons in CX Excellence, 2016” (January 2016).

<sup>12</sup> See Temkin Group Insight Report, “Creating and Sustaining a Customer-Centric Culture” (September 2015).

ask them. A&W Food Services of Canada gathers feedback on how well it keeps its brand promises of fast service, friendly service, fresh and hot food, and clean restaurants through its *Guest Connect* program. Guests can provide feedback within a restaurant through a kiosk or through its mobile app by rating each question with a “thumbs up” or “thumbs down.” Guest Connect metrics are delivered to restaurants through dashboards that allow managers to view how the guests perceive their experience. Within each restaurant, a small team of employees who demonstrate the behaviors of the four promises regularly meet and review Guest Connect results and other guest feedback (compliments and complaints), along with their on-the-job observations, and brainstorm how to make the guest experience better. TouchPoint Support Services supplements findings from its federally-mandated patient surveys with direct feedback from patients around the *GoBEYOND* behaviors that support its brand promise. The customer experience team, as well as other corporate leaders – like executive chefs and nutritional managers – regularly visit TouchPoint’s healthcare client sites and speak to patients in order to open a dialogue with them. After these visits, subject matter experts create action plans for managers to follow to address what was learned.<sup>13</sup>

- **Align incentives to encourage employees to keep brand promises.** If a company wants its employees to act a certain way, then it needs to deploy appropriate systems to reward and recognize its desired behaviors. After going through onboarding or reorientation at the start of each season, every Oklahoma City Thunder employee makes a commitment to do 1% better at certain behaviors that exemplify its brand promises, such as “communicate courteously” and “create connections.” The Thunder use a three-tier *Pyramid of Recognition* program that combines secret shoppers, fans, and full-time team staff to celebrate the employees who keep brand promises by *CLICK!*-ing with guests (see Figure 12).<sup>14</sup> At TouchPoint Support Services, managers, peers, and even customers can nominate employees for *Above and Beyond* awards, which recognize two winners every month who delivered exceptional customer service that aligned with the company’s six *GoBEYOND* customer promises. It has also introduced *Pat on the Back* cards to recognize employees for smaller gestures each and every day. The city of Centennial recognizes employees with its *kudos emails*, which are sent out by the CX manager and often generates replies from the Mayor or a City Council Member back to the employee being recognized. The CX manager watches various feedback sources—such as unstructured survey comments that mention an employee demonstrating a desired behavior—to trigger the leadership emails.
- **Infuse brand promises into company processes.** Keeping brand promises relies on many parts of the company, so it’s important that these promises permeate almost all internal processes. To help ensure its communications are consistent with its consumer promise, Anthem has created its *Brand Voice Toolkit*. Developed with direct input from Anthem customers, this toolkit is used by Marketing and content creators across the enterprise to align all the messages going out to members, employers, brokers, or employees. This is helping to not only make communications more aligned, but also makes them more personable and easier to understand. Quest supplemented its behavioral guidelines with a set of experience design principles.

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<sup>13</sup> See Temkin Group Insight Report, “Lessons in CX Excellence, 2015” (January 2015).

<sup>14</sup> See Temkin Group Insight Report, “Introducing Employee-Engaging Transformation” (February 2014).



These principles include being transparent with the cost of treatment and providing easy, intuitive, personalized services. SunPower knows that its independent dealers play an important role in delivering on its brand promises, so it offers free consulting to its dealers to help them adopt its *Customers First!* Practices and improve effectiveness. During these consulting sessions, up to four SunPower experts will spend two days with the dealers, observing what they do and offering ideas and best practices for how to simplify processes and shift their mindsets toward enhancing the customer experience.<sup>15</sup>

## **ASSESS YOUR COMPANY'S COMPELLING BRAND PROMISES CAPABILITIES**

It's hard to successfully navigate around all the obstacles you encounter when trying to make, embrace, and keep brand promises; but companies are finding ways to make it happen (see Figures 13, 14). Temkin Group has developed an assessment to help you measure how well your organization is making, embracing, and keeping its brand promises (see Figure 15). You can use this tool in a number of ways:

- **Self-assessment.** Complete the assessment yourself and identify the strengths and weaknesses of your organization's approach to its brand promises.
- **Discuss the results.** Use the assessment as a group exercise with colleagues. Identify and discuss the results, paying particular attention to where there is agreement and disagreement between different respondent's assessments.
- **Action planning.** Develop plans to strengthen how well employees understand and keep the company's brand promises by improving how those brand promises are translated into employee behaviors that are learned and reinforced in a variety of ways. When creating or refreshing your customer experience and employee engagement strategies, use this assessment to identify specific actions to take at the corporate level or within specific business units.
- **Progress tracking.** Gauge your company's improvement over time in making, embracing, and keeping brand promises by completing the assessment on an annual basis.

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<sup>15</sup> See Temkin Group Insight Report, "Lessons in CX Excellence, 2016" (January 2016).

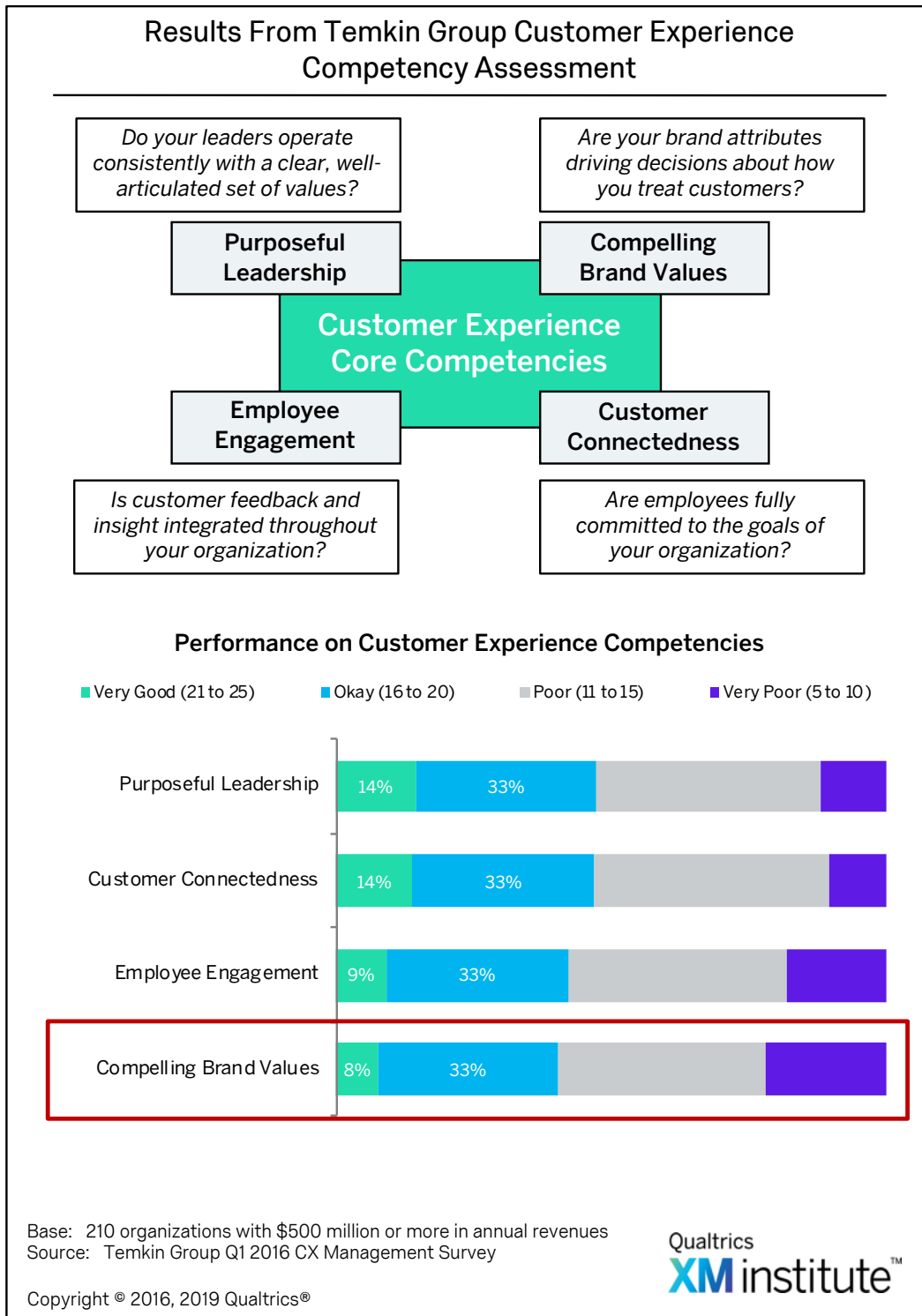


Figure 1

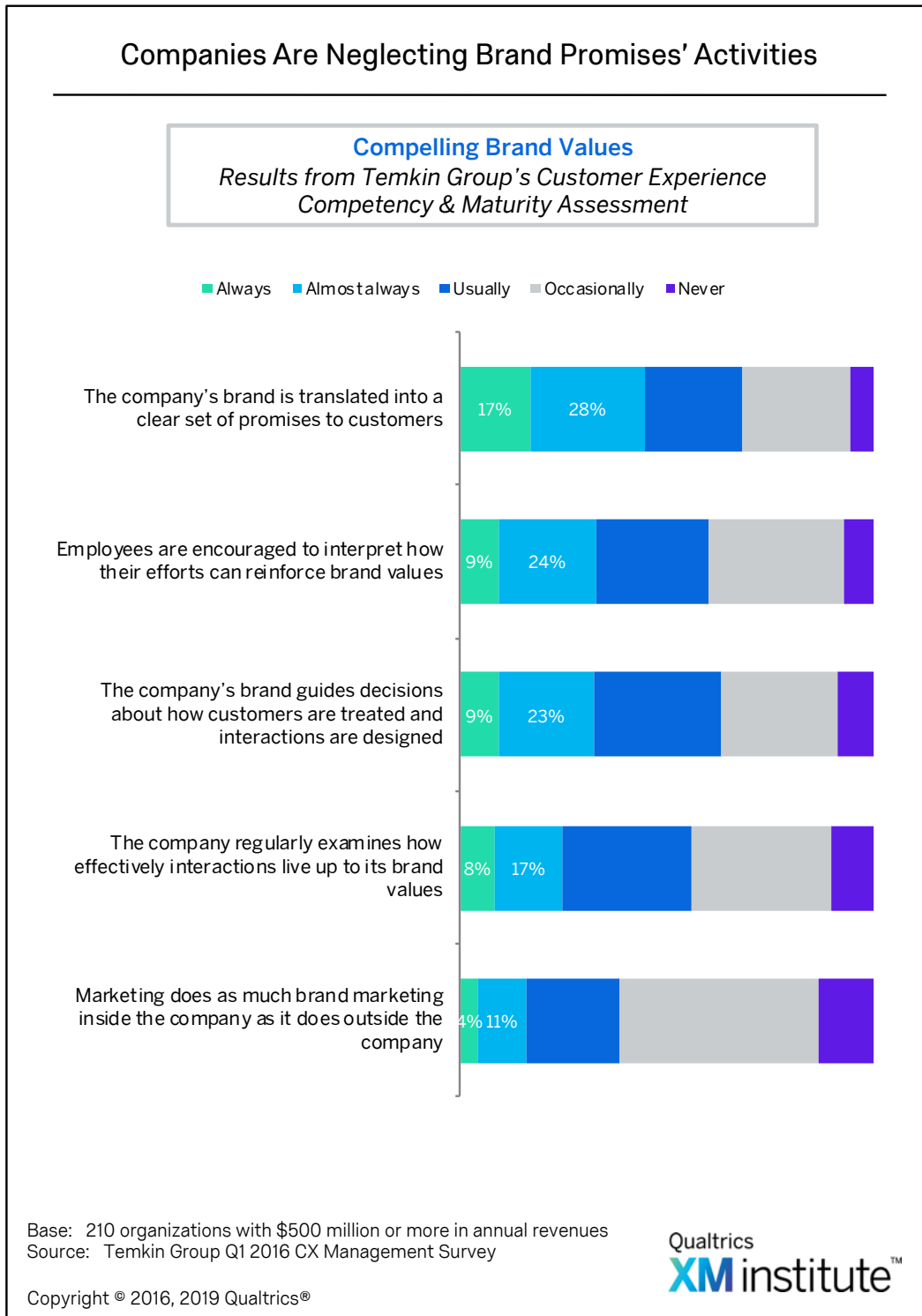


Figure 2

## Characteristics of Strong Brand Promises

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### Strong Brand Promises:

- Are aligned with the company's mission and values**  
Promises should support what the business is trying to achieve and how it wants to be perceived in the market
- Incorporate input from employees and customers**  
Don't define promises without understanding what matters most to customers. Use employee insights to help translate promises into what will work in 'the real world'
- Are easy to understand**  
In order to engage customers or employees, promises need to be clear about what the customer experience will be like
- Provide meaningful value to customers**  
Promises should help customers be successful in what they want to accomplish, ensure they put in the right level of effort, and generate positive emotions during each interaction with the company
- Provide clear direction to employees**  
Employees need to be able to understand the promises so that they can make the right decisions in their roles about how to treat customers
- Are actively endorsed by executives**  
If executives do not actively communicate and act in ways that support the promises, it is unlikely employees will change their own behaviors
- Are incorporated into the company's strategy**  
If promises really matter to the organization, keeping them should be reflected in its goals, plans, and investments
- Are periodically reviewed and updated**  
Promises may change as customers and the organization change and should be reviewed and refined as needed

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Figure 3

Connecting Company Brand Promises with its Mission, Vision, and Organizational Values	
Element	Description
<p><b>Brand Promises:</b> <i>How we treat our customers</i></p>	<p>A company's brand promises are the set of promises that the organization is committed to delivering to its customers. These promises should support how the company wants to be perceived in the market, should be aligned to its mission and vision, and should demonstrate its organizational values to the outside world.</p> <p>Brand promises may also be labeled as principles, guidelines, or standards.</p>
<p><b>Mission:</b> <i>Why we exist as a company</i></p>	<p>A company's mission defines its purpose about what it wants to be as an organization. The mission addresses the company's present and its future and serves to help management and staff make the best decisions about how to create value in the world.</p>
<p><b>Vision:</b> <i>What success looks like</i></p>	<p>A company's vision creates a picture of what its future will look like that is inspirational for employees, customers, and other stakeholders. The vision articulates the results of the company fulfilling its mission and delivering the value it hopes to create.</p>
<p><b>Organizational Values:</b> <i>How we work together</i></p>	<p>A company's organizational values define how employees—and therefore the company—conduct themselves. Strong organizational values shape a company's culture: how employees think, believe, and act together to fulfill the company's mission.</p>

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Figure 4

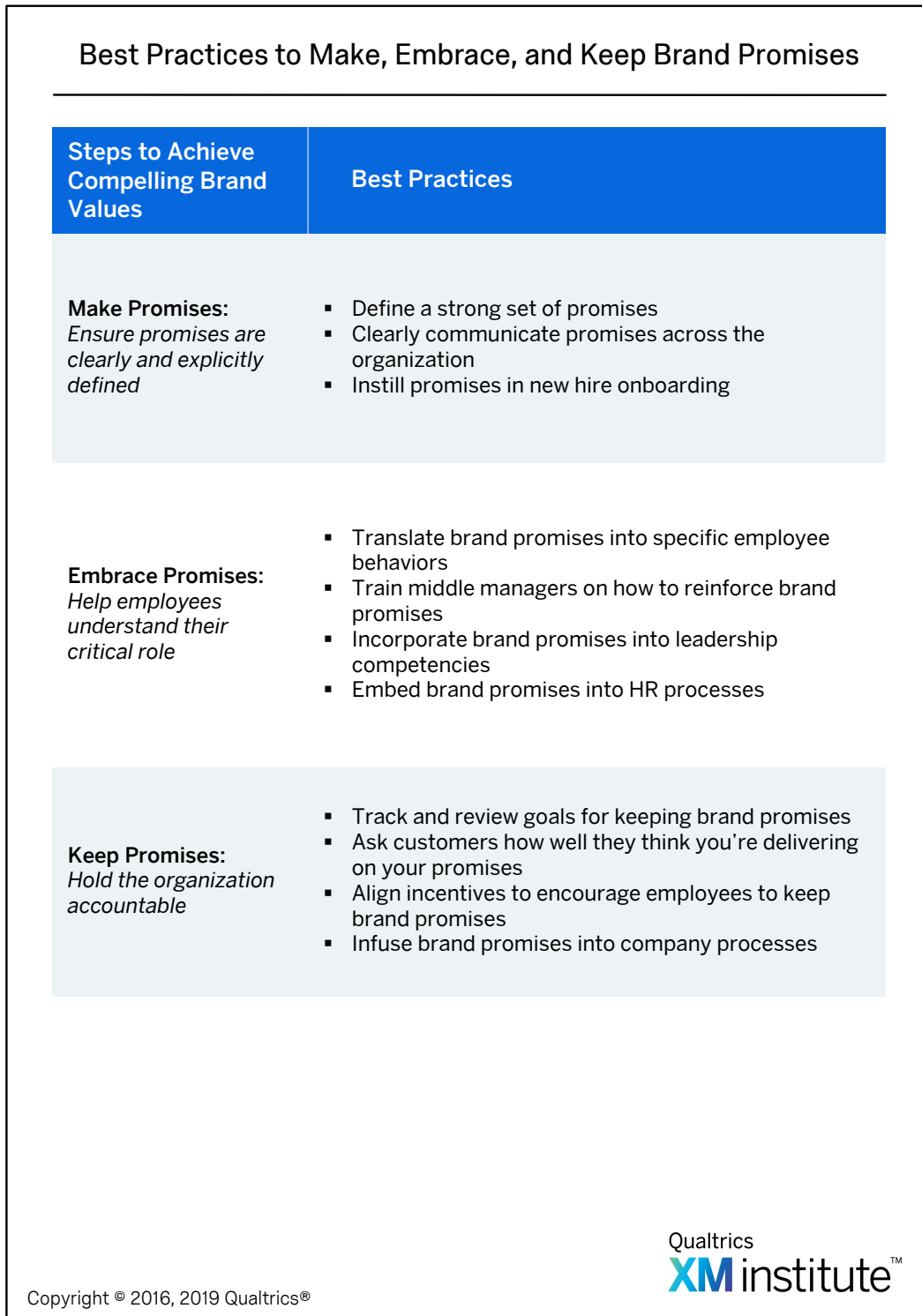


Figure 5

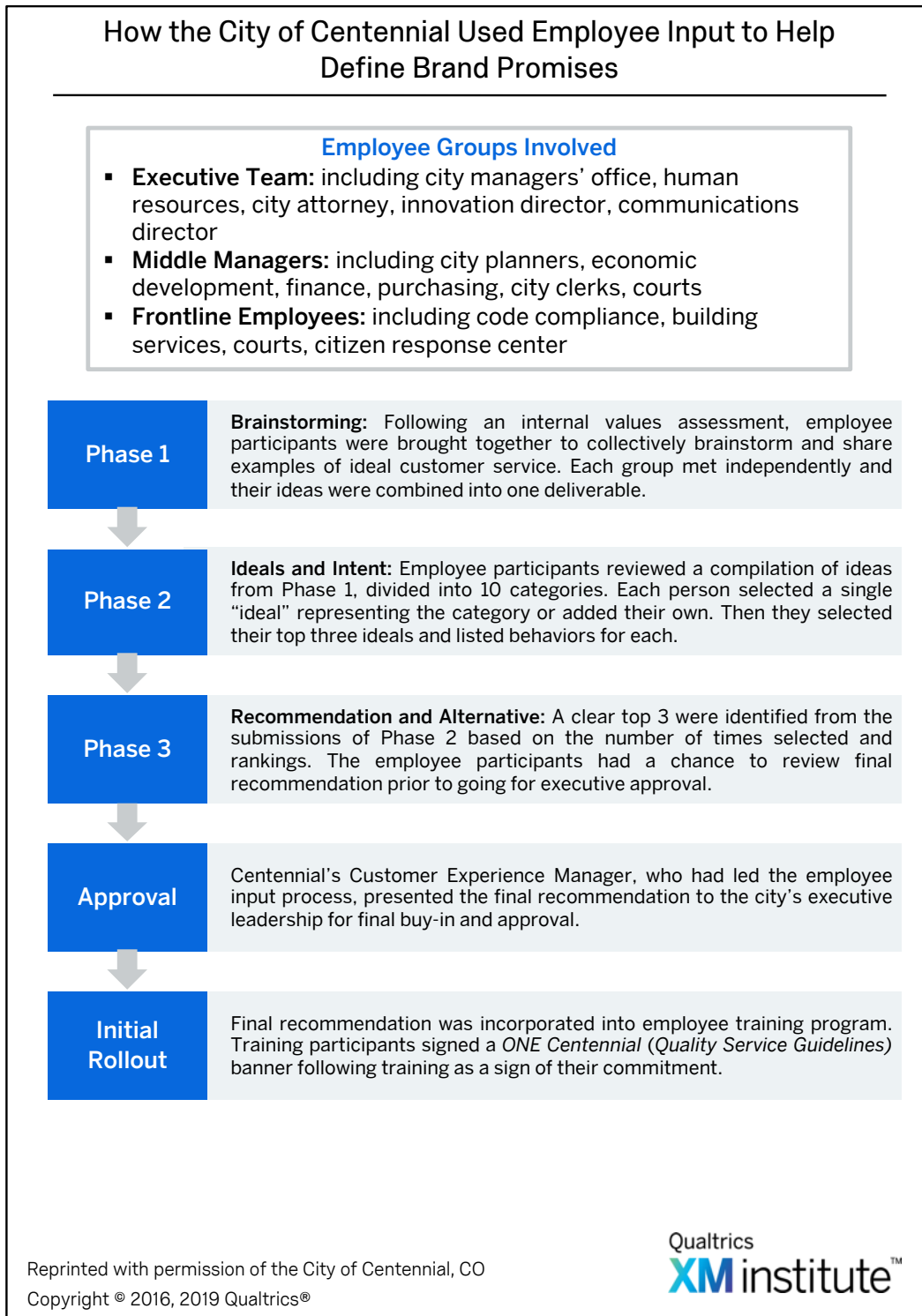
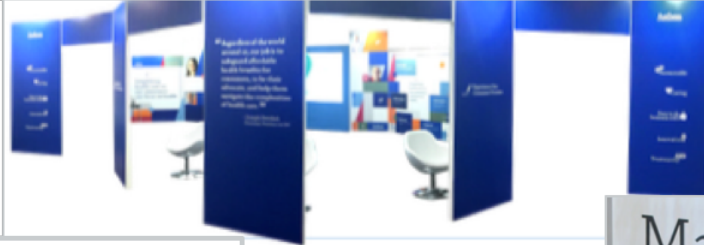


Figure 6

## Anthem's Employees Experience its Consumer Promise in *The Promise Room*

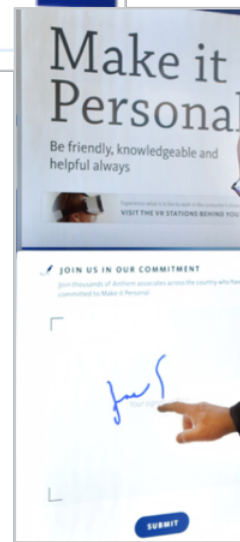
Anthem created a traveling roadshow to expose employees to its consumer promise and immerse them in everyday consumer health experiences. They also learned about ongoing changes Anthem was making to simplify and enhance those experiences in line with its consumer promise.



Employees don virtual reality goggles in the *The Promise Room* to get into a "day in the life" of an Anthem consumer.



A *Traveling Roadshow* was created for offices where the full exhibit would not be displayed. Local CX ambassadors walk fellow employees through the experience using the same VR goggles.



At the end of the exhibit, employees are invited to sign a digital wall committing to keeping the consumer promise.

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Figure 7



**Quest Diagnostics Defines the Behaviors that Lead to  
*Everyday Excellence***

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inspires us to be our best  
every day  
with every person  
in every interaction.

**Our Five Guiding Principles of Everyday Excellence**

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<b>I am customer focused.</b>	Our customers are behind every decision I make. I connect with my customer to create a positive experience by listening and asking questions to anticipate and identify needs. I collaborate on solutions that add value.
<b>I am service driven.</b>	Each customer and situation is unique. I act with urgency and am empowered to do the right thing. By holding myself accountable and keeping my commitments, I contribute to a superior customer experience.
<b>I am a professional.</b>	The work I do each day plays an important role in the lives of our patients and in the experience of my customers. I bring the best of who I am to work every day.
<b>I care about quality.</b>	What I do and how I perform matter. My customers make critical decisions based on health information we provide. I strive to produce error-free work by relying on my skills, training, and experience.
<b>I am knowledgeable.</b>	My customers rely on my knowledge and experience. I earn trust by sharing what I know, and striving to learn more. My knowledge contributes to the health of patients and the future of our company.

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Figure 8

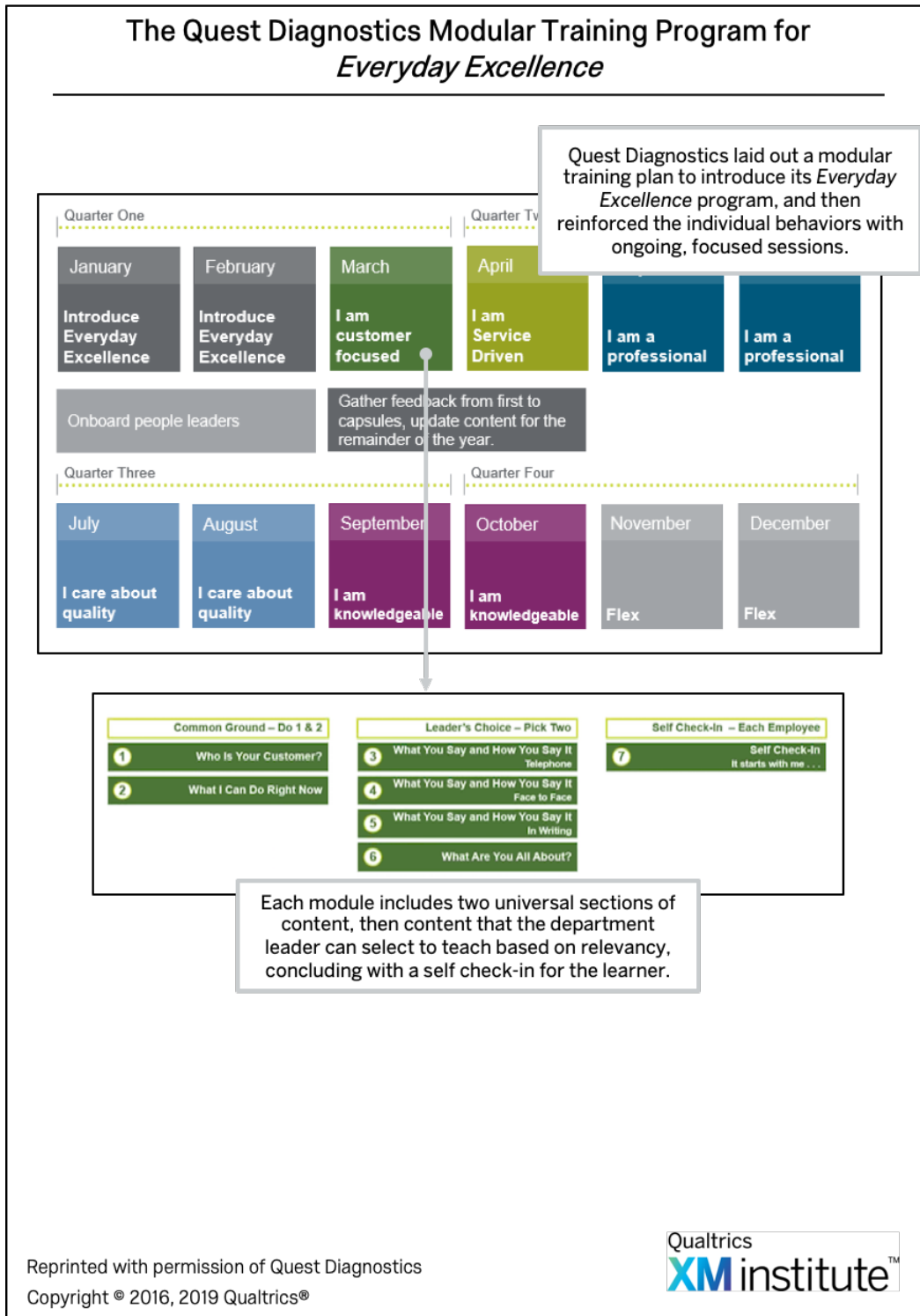


Figure 9



## Hagerty Insurance Embeds Brand Promises into Company Goal-setting with its *One Page Plan*

The content in the plan is reviewed in-depth at all company *quarterly roll-outs* by the CEO as well as during new hire orientation and Hagerty University class.

Version Date:		CONFIDENTIAL					
2015 ENTERPRISE STRATEGIC PLAN							
PURPOSE	BHAG *	2015 MILESTONES Annual Priorities			PROJECT STATUS		
		Q1	Q2	Q3	Q4		
		1					
		2					
		3					
HAGERTY WAY	2025 TENETS						
	1						
	2						
	3						
OBJECTIVES 1 - 5 Year Priorities							
	1						
	2						
	3						
CORE COMPETENCIES	TARGETS (3-5 Years)						
	Future Date						
Strengths		Weaknesses		Opportunities		Threats	
1							
2							
3							
4							
5							

The plan includes the *Hagerty Way* maxims, which define its brand promises along with long-term goals and short-term objectives. It also reports key performance measures.

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Figure 11

## Oklahoma City Thunder Recognizes Employees for "CLICK!'ing With Your Guests"

At the start of each new NBA season, the Thunder strives to educate new and returning employees on its five Guest Care service values. These are:

- **C** - Communicate Courteously
- **L** - Listen to Learn
- **I** - Initiate Immediately
- **C** - Create Connections
- **K** - Know Your Stuff



### Pyramid of Recognition

- **"100% Guest Care" Team:** Secret shoppers recognize front-line team members utilizing all five CLICK! service values resulting in an above-and-beyond Guest Care experience. Each "100% Guest Care" team member is recognized during one of two halftime presentations throughout the season with a *100% Guest Care* lapel pin, custom framed presentation photo and two CLICK! chips.
- **Fan Favorite Award:** Fans recognize front-line team members caught doing a little extra through FAN-tastic acts of service. Each recipient is individually presented a gift card for the Thunder Shop and an *I'm A Fan Favorite* lapel pin during an in-game presentation.
- **CLICK! With Your Guests CLICK! Chip Program:** Full-time staff recognize front-line team members CLICK!'ing with their Guests – demonstrating one of the five service values by *doing special things that make a big difference*. Team members are awarded CLICK! chips, which they can redeem after earning four chips for a Thunder gift of their choosing and an *I CLICK! With My Guests* lapel pin.

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Figure 12

Brand Promises: Signs of Success and Key Issues to Avoid		
	Signs of Success	Key issues to Avoid
<p><b>Make Promises:</b> <i>Ensure promises are clearly and explicitly defined</i></p>	<ul style="list-style-type: none"> <li>▪ Promises make it easy for customers and employees to understand what the experience should be like</li> <li>▪ There is clear alignment between the company’s mission and values and the promises it makes to customers</li> <li>▪ Employees have a clear understanding of what the company’s promises are</li> </ul>	<ul style="list-style-type: none"> <li>▪ Making promises without customer or employee inputs</li> <li>▪ Making promises that conflict with what the company is willing and able to commit to delivering</li> <li>▪ Not periodically confirming promises are still consistent with customer expectations</li> <li>▪ Taking a “one and done” approach in introducing brand promises to employees</li> </ul>
<p><b>Embrace Promises:</b> <i>Help employees understand their critical role</i></p>	<ul style="list-style-type: none"> <li>▪ Employees believe brand promises really matter because they see executives and managers demonstrating desired behaviors</li> <li>▪ New and existing employees get training and reinforcement in order to adopt new behaviors into their daily routines</li> <li>▪ Executives and managers understand their role in actively helping employees embrace promises</li> </ul>	<ul style="list-style-type: none"> <li>▪ Positioning this as a project owned by the HR or CX team rather than a company-wide effort</li> <li>▪ Putting attention on translating promises into behaviors for customer-facing employees only and ignoring others</li> <li>▪ Assuming employees will know how to behave when promises are only defined at the highest level</li> </ul>
<p><b>Keep Promises:</b> <i>Hold the organization accountable</i></p>	<ul style="list-style-type: none"> <li>▪ The company regularly seeks feedback from customers on how well it is keeping its promises</li> <li>▪ Leaders are willing to make trade-offs in short-term financial results to deliver on brand promises</li> <li>▪ Keeping brand promises is a key corporate objective and is regularly discussed alongside other enterprise objectives</li> </ul>	<ul style="list-style-type: none"> <li>▪ Failing to adapt previously defined metrics, incentives, and rewards to align with new desired behaviors</li> <li>▪ Not holding leaders and managers accountable to metrics on how well the company is keeping promises</li> <li>▪ Stopping with employee behaviors and not adapting company processes to support keeping brand promises</li> </ul>



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Figure 13

Examples of Companies Building Compelling Brand Values		
	Quest Diagnostics	Anthem
<p><b>Make Promises:</b> <i>Ensure promises are clearly and explicitly defined</i></p>	<ul style="list-style-type: none"> <li>Using customer insights and a cross-functional team, defines service promises referred to as Everyday Excellence guidelines:                             <ul style="list-style-type: none"> <li>I am customer-focused</li> <li>I am service driven</li> <li>I am a professional</li> <li>I care about quality</li> <li>I am knowledgeable</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Defined its consumer promise and a set of supporting behaviors for the company and employees:                             <ul style="list-style-type: none"> <li>Start out right</li> <li>Avoid surprises</li> <li>Straight talk</li> <li>Make it easy</li> <li>Make it personal</li> </ul> </li> </ul>
<p><b>Embrace Promises:</b> <i>Help employees understand their critical role</i></p>	<ul style="list-style-type: none"> <li>After a broad roll-out, uses a leader-led, module-based training program to reinforce specific concepts and skills with leaders and employees</li> <li>Modules are facilitated by leaders and managers across the organization, allowing training to be tailored to the needs of their specific groups</li> </ul>	<ul style="list-style-type: none"> <li>Created a traveling interactive exhibit--<i>The Promise Room</i>--to introduce promises to employees. Using virtual reality technology, employees are exposed to a variety of health scenarios and get an up-close view of how important keeping the consumer promise is</li> <li><i>A Roadshow in a Box</i> simulates <i>The Promise Room</i> experience for employees in offices the exhibit won't visit</li> </ul>
<p><b>Keep Promises:</b> <i>Hold the organization accountable</i></p>	<ul style="list-style-type: none"> <li>Uses an Everyday Excellence index to understand how well employees feel supported by their leaders in delivering on the guidelines in terms of the information, training, and tools they need to be successful</li> </ul>	<ul style="list-style-type: none"> <li>Includes a CX goal as part of its annual incentive program, along with executive consumer-centricity goals related to its consumer promise</li> <li>A CX goal has been assigned and cascades to individuals who are accountable for driving critical consumer outcomes, including Anthem's CX ambassadors</li> </ul>



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Figure 14

## Temkin Group Compelling Brand Promises Assessment


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**To what degree do the following activities occur within your company?**  
 1 = Never    2 = Periodically    3 = Usually    4 = Almost always    5 = Always

1. Brand promises are clearly communicated and highly visible across the organization	<input type="text"/>
2. Brand promises are written in a way that establish clear expectations for customers	<input type="text"/>
3. Brand promises are consistent with and linked to the organization's values	<input type="text"/>
4. Brand promises are made with executive and employee input	<input type="text"/>
5. Brand promises are a critical component of new hire onboarding	<input type="text"/>
<b>MAKE PROMISES subtotal</b>	<input type="text"/>
6. Brand promises are translated into specific behaviors for employees across the organization	<input type="text"/>
7. Managers across the organization are expected to help their teams embrace promises	<input type="text"/>
8. Leaders regularly discuss brand promises at internal meetings	<input type="text"/>
9. The behaviors needed to keep brand promises are incorporated into leadership competencies	<input type="text"/>
10. Performance management systems assess how well employees keep brand promises	<input type="text"/>
<b>EMBRACE PROMISES subtotal</b>	<input type="text"/>
11. Employee recognition and celebrations reinforce the behaviors needed to keep brand promises	<input type="text"/>
12. The company includes keeping brand promises within its corporate goals	<input type="text"/>
13. The company asks customers to provide feedback on how well it delivers on its brand promises	<input type="text"/>
14. Company processes are examined and changed to support keeping brand promises	<input type="text"/>
15. Leaders make trade-offs to deliver on brand promises even if it negatively impacts financial results	<input type="text"/>
<b>KEEP PROMISES subtotal</b>	<input type="text"/>
<b>OVERALL TOTAL</b>	<input type="text"/>

Make, Embrace, Keep Subtotals:	Overall Total:
<b>5 to 10</b> Very Poor	<b>&lt;37</b> Very Weak
<b>11 to 15</b> Poor	<b>38 to 45</b> Weak
<b>16 to 20</b> Okay	<b>46 to 55</b> Moderate
<b>21 to 25</b> Very Good	<b>56 to 65</b> Strong
	<b>66 to 75</b> Very Strong



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Figure 15