



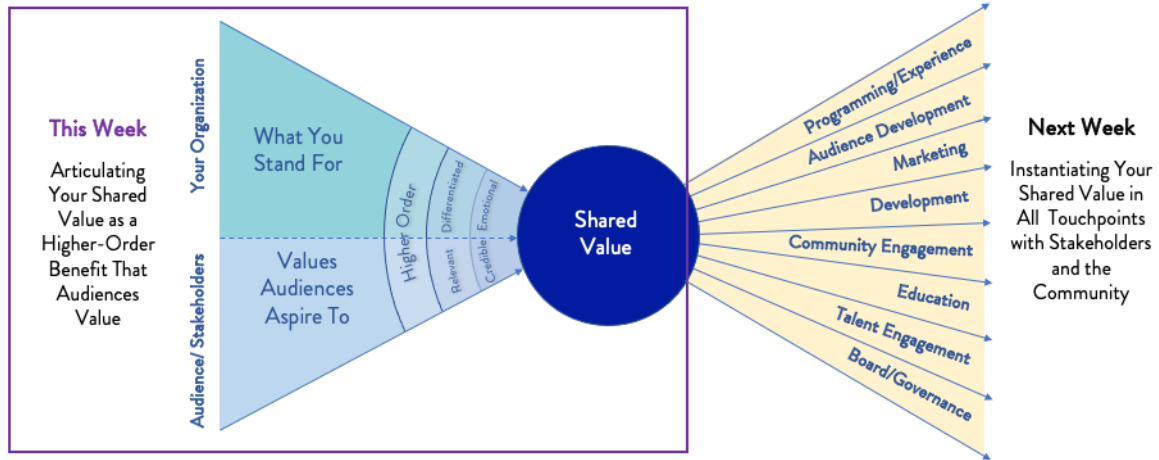
Welcome back for Week 2 prework!

This week we will be talking about how to articulate your organization's shared value with audiences. How do we find our version of Dove or Oreo? It's something of a journey of discovery, but there are concrete ways to home in on yours.

For those following along on the course version of the materials, note there is no sound accompanying the slides unless we use embedded videos. The scroll along the bottom is unnecessary as you can navigate the slides at your own speed. Apologies for any confusion.

Image source: Jennifer Steinkamp's *Mike Kelley 1* (2007) at Cleveland Clinic

How Do I Create a Purpose-Driven Enterprise?



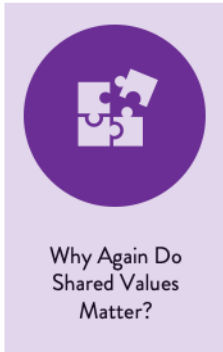
Week Two in Eight Conclusions

1. Shared values are your greatest opportunity to drive emotional connection, and thus loyalty, with audiences unable to come to your performance and exhibit halls
 2. Any effort you can make to communicate higher order emotional benefits is better than not
 3. Shared values have five essential components: they are emotional, higher order, relevant, credible and differentiated
 4. Shared values are not the same thing as mission, vision or company values, although they are related
 5. Making your shared value differentiated and credible requires examination and prioritization of the areas your organization wants to 'stand for'; if you are struggling to choose a single area, your origin story may help
 6. Making your shared value relevant and higher order requires talking to your audience members in a new way about the visceral emotional expression of why they come
 7. Organizations must balance resonance with reach to find the right level of shared value – it must be big enough to be motivational, but specific enough to clearly point back to our organization
 8. Shared values are emotional; we build the emotion by finding the tension behind the expression of the value and by taking meaningful, authentic and courageous steps to support those trying to live the value
-

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Here we summarize the week's takeaways in 8 conclusions.

This Pre-Work Has Four Parts



How Do We Clarify
Our Distinctive
Purpose?



How Do We
Discover Values
Audiences Share?



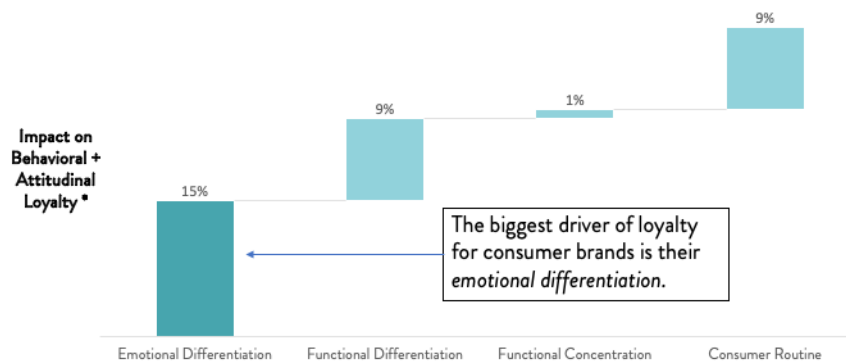
How Do We Express
Our Shared Values
Resonantly?

We will cover four areas in this pre-work:

- 1) **A quick review of shared values and what we are hoping to accomplish by adopting a shared values strategy**
- 2) A look inward to understand our distinctive purpose – the first step in defining our shared value
- 3) Methods to understand audience values to make sure our value is shared
- 4) Key insights to expressing shared values in a way that will resonate with audiences – and other stakeholders

The Key to Boosting Brand Loyalty is 'Emotional Connection'

Relative Impact on Loyalty of Brand Attributes



* Measured as Impact of Moving from 25th to 75th Percentile Performance on Each Driver: N = ~10,000 consumers

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The CEB survey highlighted here tested what drives loyalty. Loyalty was defined by a combination of factors like intent to repurchase, willingness to recommend, price premium willing to pay, satisfaction, and self-identified loyalty. And we analyzed the data to see what actually had the power to drive higher loyalty.

The box in the middle of the page says it best - the biggest driver of loyalty for consumer brands is their emotional differentiation. That's in contrast to the smaller bars to the right - their functional differentiation or functional concentration. It's bigger even than being part of someone's routine.

None of this means that functional traits don't matter. You can see they are significant and meaningful here. Nike has to make shoes that fit and perform well, but an emotional connection offers more horsepower to drive loyalty.

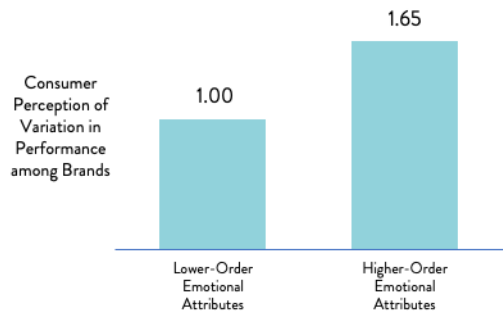
I mean, this passes the gut-check test, right? We know that people make purchases based on emotional factors and justify them based on rational considerations.

Emotional Connection Power Grows with Higher Order Attributes

Consumers see greater variation among brands on higher-order emotional attributes...

Variation in Perceived Performance of Brands on Emotional Attributes

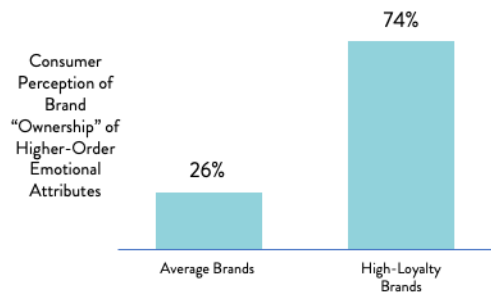
Lower-Order vs. Higher-Order Emotional Attributes



... and they are three times more likely to associate higher-order emotional attributes to high-loyalty brands

Perceived "Ownership" of Shared Values

Category Leadership on Higher-Order Emotional Attributes

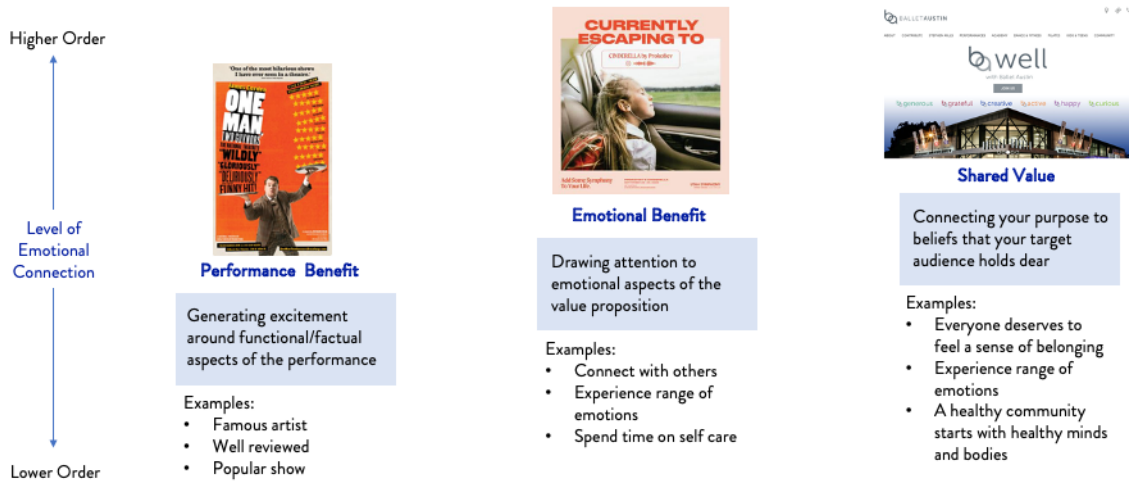


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This is the same data from CEB about loyalty. In addition to understanding that emotional connection is the most important thing to drive loyalty, the survey showed that consumers see more variation in brands on higher-order emotional attributes, and the highest loyalty brands own "shared values" – a higher order emotional attributes than just the emotional features of the product.

In other words, while emotions drive loyalty, shared values drive loyalty more than other emotions.

Shared Values Achieve a More-Intense Bond in the Arts



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There are levels of emotional connection you can achieve with customers. You can think of it as a pyramid of emotional intensity.

At the bottom of the pyramid is emotional expression of functional traits. Think of every infomercial you've ever seen. They are talking about functional aspects of the products they're pitching, but in an emotional way. For the arts, that is about conveying real excitement about the performance itself.

The next level is focusing on the emotional benefits rather than functional benefits. It's not that your anti-perspirant has effective ingredients. It's that using the right anti-perspirant gives you confidence. That's level 2: connecting functional benefits to emotional benefits. For the arts, that means describing the emotional benefit of the art itself. We have an example here from Utah Symphony – more to come on how they do that in these materials.

And at the top of the pyramid is connection with higher-order values above that are above the level of the brand, talking about beliefs. We all know of brands that manage to stand for something that's bigger than the category they're in. This is the concept of "shared values" – you may have heard it referred to as a 'brand purpose': what the brand stands for, above the level of the product category itself.

A shared value is a belief that both our organization and our customers have about a higher purpose, passion, or philosophy that has meaning in our lives beyond our specific genre or the arts in general.

Ben and Jerry's is about saving the planet, Volvo is about protecting your family. Their products become just one manifestation of that higher-order value that they share with their customers.

From the arts we have an example from Ballet Austin. They learned through their Wallace grant about the emotional connections their audiences have, at the social, intellectual and kinesthetic levels, so they combined those into a single message: "be well" and provide content under that umbrella. They offer videos about health, exercise and mental wellness, all aligned under categories of wellness. Simply aligning your work under a single emotional umbrella will have impact on your audience loyalty.

If you can connect with customers at the level of shared values, you are able to get higher loyalty. For those consumers, the brand feels like part of their identity. That's very powerful.

What is a Shared Value?

What It Is

A shared value is a belief that both our organization and our customers have about a higher purpose, passion, or philosophy that has meaning in our lives beyond our specific genre or the arts in general.



What It Does

A shared value enduringly connects the core beliefs of the people inside an organization with the fundamental human values of the people the organization serves.

Shared values have a powerful impact on loyalty because it connects the core beliefs of people inside and organization with the fundamental human values of the people the organization serves.

Key Characteristics of a Shared Value

| EMOTIONAL | HIGHER ORDER | RELEVANT | CREDIBLE | DIFFERENTIATED |
|--|--|---|---|---|
| Based on feeling and emotions, rather than programmatic attributes | Must have meaning in the consumer's broader life, not just in his or her interaction with the category | Must be relevant to the consumer and the category | Reflects something the the brand genuinely embodies or supports | Stems from the qualities that make a brand truly unique |

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CEB research found these five characteristics of a shared value. We will go into these in much more detail in Week 2, but this should give a greater sense of exactly what a shared value is.

It is emotional: in particular, it resolves an emotional tension the consumer is feeling — maybe they can't live their lives the way they want.

It is higher order: it is above the category. Nike's shared value isn't about the performance enhancement of shoes, it's about believing in something even if it means sacrificing everything.

It is relevant: something about the current social or political environment particularly raises the importance here — but at the most basic level, it is something the consumer cares about.

It is credible for you to be talking about it. Authenticity matters a lot here. It should point back to something you've genuinely embodied in the past.

Last, it is differentiated. This means ideally it makes people think about your brand because you are naturally associated with this shared value — it stems from what makes your brand unique.

Shared Values in the Arts: Ballet Austin

Ballet Austin Shared Value: We believe that healthier people lead to stronger communities.

EMOTIONAL

The encouragement of lifelong health and is based on a belief of the importance of well being for all.

HIGHER ORDER

Health and well-being for all have meaning in audience members lives outside their relationship with Ballet Austin.

RELEVANT

Health and well-being are relevant to both the audience member and the ballet.

CREDIBLE

Ballet Austin's commitment to health and well-being is evident through marketing, community engagement, and programs.

DIFFERENTIATED

Encouragement of health and well-being align with Ballet Austin's mission and are not typically a core focus of other arts organizations.

Here we go through Ballet Austin's shared value statement, which is all under the theme of "be well" on their website (<https://balletaustin.org/community/be-well-network/>).

You can see that the message is emotional – there is a tension in people wanting to live healthier lives but struggling to incorporate health into their daily practice.

It is higher order as it reaches above the level of dance itself.

It is relevant because, especially during the pandemic, focusing on health is a priority.

It is credible because Ballet Austin has dance studios to help people improve their physical health – even if not to become professional dancers.

It is differentiated because a focus on health is not typical of arts organizations – although admittedly other ballet organizations could easily replicate it as there is not a Ballet Austin-specific angle to the message.

The Consequences Small and Large

The Short-Term Opportunity

Aligning messaging around a shared value in the current moment will gain traction.

Telling audiences about your community engagement work will help them understand why they should help your organization right now.

Putting the work you do under **a single frame** will communicate your organization's meaning more effectively.

The Long-Term Opportunity

Purpose-driven organizations that **align around shared values** build brand loyalty above and beyond those that focus on functional attributes.

Being purpose-driven means using the shared values statement to make organizational decisions beyond marketing communications, including **partnerships, community engagement, performance experience, digital and philanthropy activities**.

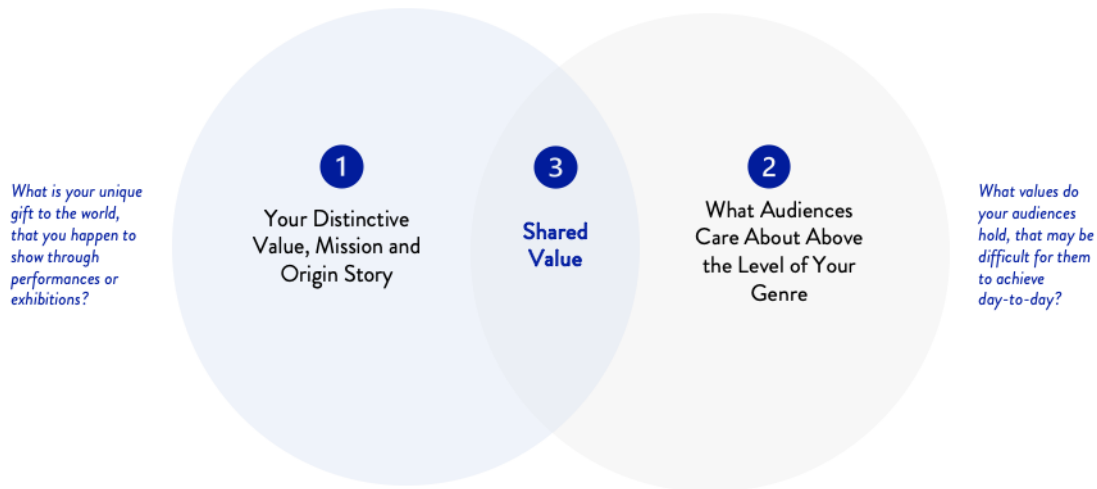
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On the left we show a few straightforward things you can do to take advantage of the insight of shared values. Arts organizations are non-profits, after all, we have a purpose, and we do tons of community engagement. It is possible to package the community work that we're already doing as being in service of values that are higher the level of the art form we've mastered.

We can also make it clearer to audiences that the community and education work that we do is in service to the same higher value as the stage. This is important for all kinds of reasons as we compete for mindshare with social safety net and other causes. Simply aligning your work under a single emotional umbrella will have impact on audience loyalty.

But the real opportunity is not packaging and communications. The real opportunity is to recast yourself as a purpose-driven organization. That's not about revisiting your strategic plan or mission and values statement — it's about enhancing the emotional intensity of all that you do by reframing it as a manifestation of your very reason for existence. It's about making sure that audiences—loyal or not—are aware of what you stand for, what you believe in, what you will fight for. That's probably not "excellence" or some similar term peppered throughout our mission statements. It's about making sure people know what made you master your craft to begin with... what good you want to see furthered in the world that your art form helps to advance?

How To Find Your Shared Value



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There are two parts to **shared** values – you, and the audience.

Fundamentally, shared values start with you. You need to examine your unique gift to the world, that you happen to show through performances or exhibitions. This requires a look back at your origin story, your distinctive value. By the way, this is –not- the same as strategic planning. A shared value is a –single- statement about what you stand for, above the level of the arts.

On the other side, you need to understand your audience too. What values do they hold that may be difficult to achieve? What will speak to them in this moment?

Start with 'You'

What is your unique gift to the world, that you happen to show through performances or exhibitions?

1

Your Distinctive Value, Mission and Origin Story

1

Found by examining your organization in a structured way

We'll look first at how you identify your unique gift to the world.

This Pre-Work Has Four Parts



Why Again Do
Shared Values
Matter?



How Do We Clarify
Our Distinctive
Purpose?



How Do We
Discover Values
Audiences Share?



How Do We Express
Our Shared Values
Resonantly?

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Separating a 'Shared Value' from Similar Concepts

| | Shared Value | Vision | Mission | Values |
|-----------------------------|---|---|---|--|
| What It Is | A belief that both our organization and our customers have about a higher purpose, passion, or philosophy that has meaning in our lives beyond our specific genre or the arts in general. | A portrait of a future that could exist if the value you believe in were instantiated in the world and that we intend to work to help create. | A statement of the path we intend to take to bring that future vision into existence. | A set of behavioral principles that we expect our staff, our stakeholders and our outside partners to adhere to. |
| How We Talk About It | <i>We believe... We exist in order to...</i> | <i>Therefore, we want to create a future that looks like The future we will work toward is...</i> | <i>We will bring that vision into reality by...</i> | <i>We behave according to ... We will seek partners who...</i> |

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It's useful to distinguish "shared values" from other similar concepts that they could be confused with. After all, haven't we done enough navel gazing on our mission, vision and values statements? It is confusing, I know. We wouldn't inflict this on you if it weren't crucially important to do during closure.

At the highest level, shared values intersect with mission, vision, and values like this:

Vision is the picture of a future you'd like to see exist.

Mission is a statement of the path you intend to take to help make that vision a reality. Values are the behavioral expectations that we hold ourselves, our stakeholders and our partners to.

An organization's purpose makes its leaders want to reshape the future in some way. The VISION is the portrait of the future they want to see. and the MISSION is a statement of the way this organization is going to help to bring that vision closer to reality. And an organization's VALUES are the behavioral principles that they expect staff and other stakeholders to adhere to in executing the mission.

Put another way...we believe X [that's the shared value]. Therefore, we want a future that looks like Y [our Vision]. We will bring that vision into reality by Z [the mission]. In executing that mission, we will behave according to the following principles [values].

SHARED VALUES are our reason for existence, our motivating purpose, why we even thought to create our vision.

Kaboom's Reason for Existence Gives Birth to Its Mission



Shared Value

Every kid deserves access to safe, communal play-space to advance their physical, social, and emotional development.

A belief that both our organization and our customers have about a higher purpose, passion, or philosophy that has meaning in our lives beyond our specific genre or the arts in general.

Vision

We envision a world where every kid has a safe place to play within walking distance of their home.

A portrait of a future that could exist if the value you believe in were instantiated in the world and that we intend to work to help create.

Mission

We will end play-space inequity by helping communities to build inspiring play-spaces for kids everywhere.

A statement of the path we intend to take to bring that future vision into existence.

Values

- Equity
- Community
- PLAYce (welcome, safe, fun)

A set of behavioral principles that we expect our staff, our stakeholders and our outside partners to adhere to.

Some of you may be familiar with the not-for-profit KABOOM! KABOOM! partners with communities to build playgrounds, especially in places where kids don't otherwise have access to safe outdoor play.

So, there's a sad but inspiring story about why the organization was founded. In 1995, Darrell Hammond read an article in the paper about how two young kids had suffocated in an abandoned car in southeast Washington, DC on a hot summer day. Apparently, they had no place to play near their house, so had chosen the car, and they were trapped inside. Darrell's life's purpose was launched, and Kaboom! has transformed thousands of spaces in some of the toughest, poorest neighborhoods in North America into creative playgrounds.

So, KABOOM believes that every kid deserves a safe, communal place to play and grow. That's why the founder and his team get out of bed in the morning.

A Starting Point for Brainstorming Shared Values



Source: Abraham H. Maslow, *Motivation and Personality*, (New York: Harper & Row); Edward L. Deci and Richard M. Ryan, "The 'What' and 'Why' of Goal Pursuit, *Psychological Inquiry*. Carol D. Ryff and Corey Lee M. Keyes, "The Structure of Psychological Well-Being Revisited."

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We researched the many potential emotional levers you could pull for your shared values strategy, and found they fell into 9 categories of identity. If you are searching for how to articulate your organization's shared value statement, this is a great place to start.

Getting Stakeholder Input on Your Purpose

Staff/Alumnae

The Past

What is our origin story?

What were we created to do that is different than other similar organizations?

What points in our history have we taken a risk to stand up for something?

What are times when we have missed an opportunity to take a stand?

The Present and Future

Why did you join Organization X?

How would you characterize our culture compared to similar organizations?

What do you want to leave behind as a result of your work here?

Audiences/Visitors

What is Organization X's biggest mark on this community?

What is your most emotional association with organization X?

What is a story about Organization X that really says a lot about who they are?

What would Organization X never do that similar organizations might?

Other Stakeholders

Performances/exhibits aside, what would this region lose without Organization X?

Why did you choose to partner with Organization X? Why were you a good match?

Who does Organization X fight for/stand up for/protect/support?

Not all feedback from stakeholders will relate to your shared values, but, as a whole, the feedback should provide directional clues to your purpose.

Also important for articulating your organization's shared purpose is involving your various stakeholders: staff, audience, donors, community members and more.

These are great questions to ask any time you have an opportunity. It doesn't need to be a scientific survey – just understanding or reflecting on your past and unique qualities will help lead you to your shared purpose. Even though not all the feedback will relate to your shared values, you'll gain an understanding of what those closest to your organization see as your unique qualities.

In particular, your origin story is a great source of inspiration for your shared value statement.

A Return to Roots at *The Atlantic* Magazine

Social Media Strategy: Take One

Long Form Content



Short-Form Content



Because of the magazine's long tradition as a hard-copy source of content for intellectuals, *The Atlantic*'s early work in social media was designed as a "teaser" to drive people to its "real" content—long form articles

Social Media Strategy: Take Two

The Idea of *The Atlantic*: **BRAVE**



Long Form Content



Short-Form Content



After initial slow progress, the magazine went back to its purpose, beginning with its abolitionist roots. It reconceived long-form and social content as separate, equally important manifestations of that purpose.

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Several years ago when social media was still fairly new and its impact on journalism less clear, the *Atlantic* magazine was working through its social media strategy. Those working at the *Atlantic* loved the print copy as did many of their traditional readers. They had a long tradition as a hard-copy source of content for intellectuals. So when they initially designed their approach to social media, they envisioned it as driving content to their long form articles.

But the reality was that, increasingly, many more people were exposed to the short form content than reading the long form content. As a strategy, pushing people to long form wasn't working, so the *Atlantic* needed a new approach that recognized the value of long form content AND the importance of short form. What unified the two? If the short form content — videos, tweets, Facebook posts or highlights — was how most people primarily consumed the *Atlantic*, what would make it all uniquely *Atlantic*?

To answer this question, staff at the magazine went back to its purpose and origin story. The magazine began in the abolitionist days of the US, unafraid to make bold statements about the truth of the evils of slavery at a time when it was common practice. The *Atlantic* therefore reconceived both long form content and short-form as unified by the single idea of the *Atlantic*: BRAVE.

This enabled all the work to be unified under a single branding umbrella and helped readers of the *Atlantic* — in whichever form they preferred — understand what the magazine stood for. If you wanted brave, accurate reporting that was unafraid to speak truth to power, that's where you would look. The

long-form content would continue its tradition of deep intellectual content under this umbrella, and the short-form content focused on capturing the 'brave' essence of the reporting. Each group was guided by a common purpose.

What's our takeaway? The Atlantic's failed strategy was seeing the new areas of content as a vehicle to their existing work rather than a new, equally legitimate way to manifest their ideals. Their origin story helped them correct that strategy.

The Inspirational Power of an Origin Story



The Historical Roots of the Barnes Foundation



BARNES

THE BARNES FOUNDATION

A.C. Barnes Company, established in 1908 to sell Argyrol (an antiseptic), was organized as a cooperative. **Two hours of each workday devoted to seminars.**

The philosopher John Dewey taught some seminars. His teaching philosophy included **direct experience with subject-matter**, including Barnes' art collection.

Barnes **formally established a foundation in 1922 as a school rather than a typical museum** because of his collaboration with Dewey.

At his death in 1951, Barnes **left his collection to Lincoln University, an historically black college.**

Mission Statement

"The mission of the Barnes is to promote the advancement of education and the appreciation of the fine arts and horticulture"

So many organizational mission statements can come off flat...



Shared Value

We believe that people, like art, should not be segregated and that people from all walks of life deserve access to the transformational improvement possible through appreciation of the arts.

... even when their underlying reason for existence has the power to inspire.

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So, the first place to look for your shared value, your purpose, is inside your organization. And as the Atlantic shows us, your origin story can be a powerful. Now, not every organization has a clear-cut origin story, but plenty do, and when they do, they are gold.

Take the Barnes Foundation. You may know them. It's in Philadelphia and has one of the best collection of impressionist, post-impressionist and modernist works in the world.

Albert Barnes founded a company in 1908 that made a fortune selling an antiseptic silver called Argyrol. Barnes organized the company as a cooperative and devoted TWO HOURS of every workday to seminars for his staff. Among the lecturers was John Dewey, a famous philosopher whom he befriended. Once things took off, Barnes assembled an exquisite art collection, which he often brought in to enliven lectures. Dewey espoused a teaching philosophy of immersive learning.

Barnes believed that education in the arts and sciences was enriching for everyone, not just the elite, so he donated his collection to a historically black university upon his death in 1951.

So, if you look at the Barnes mission statement today, it might feel a bit drab: "*The mission of the Barnes is to promote the advancement of education and the appreciation of the fine arts and horticulture.*" (You can almost feel "horticulture" jimmied in there because his wife cared about it.)

Which is more inspiring? That or this shared value: *We believe that people, like art, should not be*

segregated and that people from all walks of life deserve access to the transformational improvement possible through appreciation of the arts.

What's more, even that drab mission statement carries a little more weight once you know the story behind it, doesn't it?

By the way, not everyone has the perfect origin story. "An oil tycoon wanted our city to be taken seriously so he built elite opera house that we struggle to fill" doesn't exactly bring tears to the eyes. If you DON'T have an inspirational origin story or if it's less than perfect, don't despair. You can review your history and look for points where you've taken a stand, ask great employees what made them choose you.

Essentially, you are on a forensic mission to find the earliest and most visceral emotional connections that people have with your history. And the cool thing is how inspiring the search can be for staff and other stakeholders, especially right now.

Barnes Signals Its Purpose in All of Its Outreach



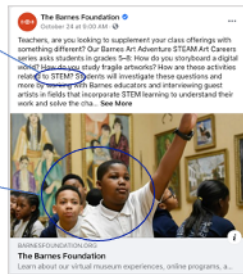
The Foundation's Programming Reflects Barnes' Original Purpose

The Foundation's purposes acts as an emotional framework binding all community outreach. The shared-value infuses communications about programming with meaning, signaling that the organization is about something more than just great art.

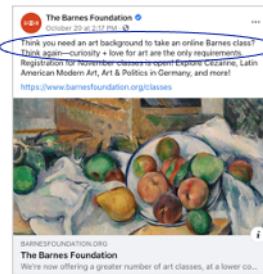
Targeting young people with an engaging entry point to STEM is right in line with the Dewey teaching philosophy that Barnes favored.

Barnes was anti-segregationist and left his art collection to a black university. The photographic choice reflects his desire to break down barriers to art appreciation.

Community Engagement



Audience Engagement



Explicit welcoming of newbies reflects Barnes' belief that in the value of democratized arts education.

Whereas others may see ordinary outreach, audiences and donors who know the Foundation's purpose feel more emotional connection when they see it manifested in the organization's outreach.

This page shows how the Barnes has taken that original purpose and reflected it across their community and audience engagement.

This helps audience and community members understand what Barnes 'stands for' in every encounter, whether on social media, email or in-person. And while the explicit welcoming of new patrons reflects the museum's belief in the value of democratized arts education, it also speaks to loyal donors and audience members who have aligned themselves with the Barnes' purpose.

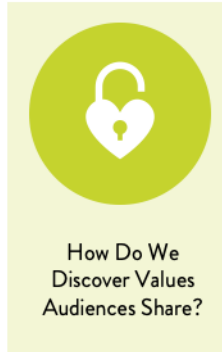
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How To Find Your Shared Value



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On the other side, you need to have an understanding of your audience too. What values do they hold that may be difficult to achieve? What will speak to them in this moment? At a minimum, you need to make sure that what gets you out of bed and them into seats is the same thing, or at least draws from the same motivations. But it's also true that understanding the deep values of your customers will help you develop a richer expression of your shared value.

Learn What Your Customers Yearn For

2

Found through
structured interviews
with loyal audiences

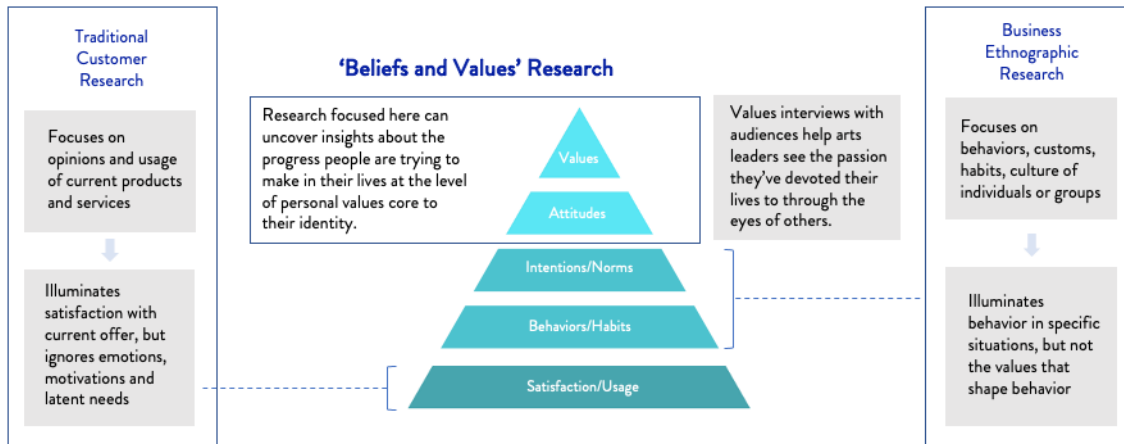
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What Audiences Care
About Above the Level
of Your Genre

*What values do
your audiences
hold, that may be
difficult for them
to achieve
day-to-day?*

So let's talk about how we can understand what values audiences may hold, so that we can make it easier for them to fulfill.

For Insight About Values, Ask Different Questions



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To understand audience values, we can't use traditional customer research. That typically will focus on opinions and usage of current products/services. Consumers have a hard time in typical surveys getting beyond their reactions of what you have offered in the past.

Ethnographic research can get us a step closer by giving us a better sense of behaviors and intentions by observing people consuming or making choices about consumption – or asking lots of probing questions about those choices.

To get to beliefs and values requires new types of conversations with our audiences.

The good news is, for organizations that feel stuck in creating a shared value, those audience conversations can be really energizing. Think of it kind of like the second sketch in the Dove video. Sometimes, getting someone else's perspective can bring new vitality to our search for who we are.

But it's hard to think about having those conversations, isn't it? We have talked to a hundred arts organizations in the pandemic. Many have reached out individually to patrons to find out how they're doing. Many more have surveyed audiences. But few have talked to audiences about their wants and needs right now. And almost no one has talked to them at this level of values or purpose, in the pandemic or before.

It's hard because these kinds of conversations are foreign to most of us, so it's not in the least surprising. I mean, if nothing else it's awkward. "Hi would you mind having a quick conversation. We'd like to know what your life's purpose is? What creates meaning in your life? Luckily, we have a great example from the arts – Utah Symphony found a simple way to unlock audience values and attitudes toward their organization through conversations.

Case Study: Identifying Relevant Customer Values

Structured 'Values' Interviews

UTAH SYMPHONY
CLASSICALLY CHARGED

Situation

To deepen connection with audiences, Utah Symphony wanted to shift from "programming dominant" marketing messages toward messages about emotional connections to the symphony.

Action

To understand what audience members value about the organization, Utah Symphony asked a handful of its most engaged customers to pick photographs that represent what the symphony means to them and followed up with a structured set of probing questions.

The symphony analyzed the results of the interviews to define audience members' higher order values and now uses the values to guide its marketing focus.

Result

After shifting to values-based marketing in 2018, Utah Symphony saw an increase ticket sales, revenue, and reactivated buyers.

Additionally, the research shifted how the organization talks internally about the role the symphony plays in patron lives and also frames their decision-making related to the patron experience.

Utah Symphony uses structured 'values' interviews to create resonant audience messaging and shift decision-making related to patron experience.

A Familiar Sight

UTAH SYMPHONY
CLASSICALLY CHARGED

Program-Based Marketing (Pre-2018)



- **Focus:** Programmatic details
- **Origin of Campaign:** Long-standing approach to promote upcoming concerts
- **Outcome:** Not memorable; not often sourced as how attendees heard about a concert

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Before Utah Symphony adopted this technique, pre-2018, the organization focused their marketing communications primarily on program-based marketing. They found that attendees rarely sourced the programmatic advertising as the way they heard about a concert and believe the marcomm is fundamentally not memorable enough.

A Structured Approach to Identifying Deep Feelings

Pre-Interview Request

Identify a set of 10 images that represent that the symphony to you, but do not include any pictures of the symphony, musicians, or instruments.



This form of interviewing is known as the [Zaltman Metaphor Elicitation Technique \(ZMET\)](#).

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Components of Interview

Storytelling

Ask interviewee to explain how each picture represents their thoughts and feelings about the symphony.

Missing Pictures

Ask interviewees if there were ideas or feelings they wanted to express but could not find an appropriate representative image.

Triad Task

Select three pictures at random. Ask interviewee to explain how two of the pictures are similar but different from the third.

Sensory Metaphors

Ask interviewees to express their ideas using various sensory images. For instance, ask what is (and what is not) the color, smell, or touch of the symphony.

Additional Probing Techniques

To encourage interviewees to elaborate on their thoughts more fully, continue probing on pictures. For example, ask them to tell you what else might be in a picture if the frame was extended.

They came to the same conclusion that ABA did – that there is a huge missing opportunity to connect emotionally, rather than programmatically, with audiences in their communications. And so the head of marketing decided to reach out to a set of regular attendees. And the approach he took was pretty clever.

He asked them each to bring in 10 images that represent the symphony to them – anything they wanted. The only catch was that none of the pictures could include the symphony hall, musicians or instruments. In other words, he was looking for feelings not facts.

In these interviews – which used a technique called the Zaltman Metaphor Elicitation Technique (ZMET) – they started with the photos and asked interviewees to describe the picture and connect it back to their thoughts and feelings about the symphony. For example, one participant brought a picture of an Adirondack chair and ultimately said ‘this is my chair in the symphony – it’s an oasis for me. I feel the same sense of calm in the symphony as I do when I’m at the lake.’

Then the interviewers ask about missing pictures – if they wanted to express feelings but couldn’t find an appropriate image.

The third technique they use is the ‘triad task’: asking the interviewees to make connections between pictures to draw out further understanding of the feelings behind the pictures.

Last, they use sensory metaphors to draw out more context around the photographs and the feelings that the interviewees associate with the symphony. Asking about the color, smell or touch forces the interviewee to articulate even more without relying on literal functional elements of the symphony.

In general, the idea is to use images, senses and associations to go from the typical things audience members talk about — their seats, the performance and the hall — to the emotional associations, beliefs and values underlying their choices.

By the way, if ZMET seems a little complicated, there is a simpler way.

A Simplified Approach: The Five “Whys”



Why did you bring this photo?

It reminds me of my seat at the symphony.

Why?

I feel peaceful when I am at the symphony.

Why?

It gives me a chance to clear my head.

Why?

I can escape without any other distractions.

Why?

It gives me a chance to meditate. I leave with a sense of clarity about my life.

Continue asking “Why?” until the respondent no longer has an answer. This indicates you’ve reached the core of their feelings.

Why?

It just does.

While we recommend exploring the ZMET technique, if you are a bit intimidated by asking about associations and senses, you can use the same pictures and do something much simpler.

You may have heard about the technique called the “5 whys” – it was popularized by Toyota in the 1980s to help get to the root cause of issues in factories. Essentially, it’s a method to dig deeper than you otherwise would. If you ask ‘why’ once or twice, you’ll learn a little bit more about what’s behind the original statement. But if you ask ‘why’ 5 times – maybe changing up the phrasing a few times so you don’t sound like a toddler asking why the sky is blue – you learn much deeper truths about a question.

You can see the same example here of the seat on the lake. Most likely the individual bringing the photo will start by describing the fact that they brought this picture. If you ask ‘why’ a few times – you get to the feelings associated with it. But if you ask ‘why’ 5 times or more, you’ll get to the much deeper associations the individual has. You know when you’ve reached the end as the respondent will typically say something like ‘it just does!’

Analyze Customer Feedback to Identify Customer Values

Key Phrases from Interviews

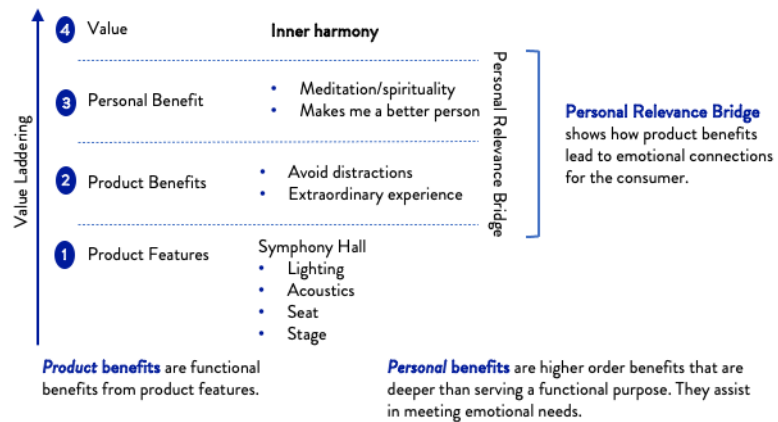
“I feel at peace when I am sitting in my seat.”

“It gives me a chance to quiet my thoughts.”

“It feels like I’m being transported to somewhere else when I’m inside the hall– like I’m in a different world.”

“The hall is so majestic – incredible acoustics and beautiful architecture.”

Connects Features to Personal Benefits & Values



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The ZMET technique uses a concept called ‘laddering’ to get from the product features up to the inner values an audience member might feel.

Typically an interviewee will go through the value ladder from product features (“the hall is majestic”) to values like inner harmony. This requires going from features, to product benefits, to personal benefits to value. The interviewer gets through that laddering with the types of questions described on the earlier page about ZMET. If you do this for several different audience members you start to see themes across the associations between product features, product benefits, personal benefits and values.

You can see the map of these values that Utah Symphony made, in a few pages.

But back to shared values, the big benefit is that you are understanding from audience members their deepest emotional connection to you, and at the same time asking them to connect that to things that they personally cherish. Whether or not they name a specific shared value that you can build off of, the emotional “evidence” that you’ve collected will give you ample opportunity to draw connections between those data and your own internal exploration of purpose.

Use Values to Design Emotionally Resonant Marketing

Examples of Utah Symphony's Values-Led Marketing Campaigns

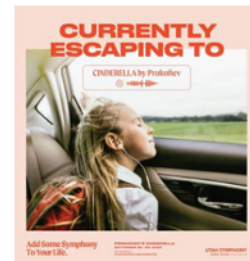
Value: Accomplishment



Value: Beautiful World



Value: Inner Harmony



Why it works:

Signals how the symphony supports learning and personal development through challenging and complex performances.

Signals how the symphony creates the opportunity to experience culture and history and provides an extraordinary experience.

Signals how the symphony provides an opportunity to avoid distractions and connect with your spirituality.

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Utah Symphony then used the values it uncovered to create emotionally resonant marketing campaigns. Their interviews uncovered three values they decided to amplify: accomplishment (how the symphony supports personal development through complex performances), beautiful world (how the symphony provides an extraordinary experience related to culture and history), and inner harmony (how the symphony provides an opportunity to avoid distractions and connect with your spirituality).

They worked with an advertising agency to build a campaign around these values.

A Marketing Journey

UTAH SYMPHONY
CLASSICALLY CHARGED

Values-Based Marketing (Launched in 2018)

Focus: Brand resonance through audience values

Origin of Campaign: Audience interviews completed with the intention of understanding audience members' deeper connections to the organization and art form. Utah Symphony worked with their creative agency, STRUCK, to create the campaigns.

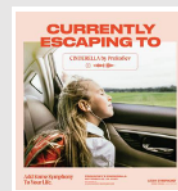


Campaign #1: Symphony Rock Stars

Campaign #2: Unexpected Listeners



Outcome: Highly memorable, one year after the campaign audience members were still bringing it up proactively; appealed to a broad range of segments



Outcome: TBD, launched in Fall 2020

You can see the journey Utah symphony has been on, thanks to the use of values-based marketing. They created new advertising that appealed to audience values and found the campaigns to be much more memorable to audience members and patrons.

Results

Impact of Values-Based Marketing

Changes between 2017–2018 and 2018–2019

7% increase in Utah Symphony's Masterworks Series ticket sales

16% increase in Utah Symphony's Masterworks Series revenue

18% increase in reactivated ticket buyers

"The research and values mapping has shifted how we talk internally about our patrons and the role the symphony plays in their lives. It has helped frame decision making related to the patron experience.

For example, when we launched our UNWOUND casual concert series, there were many conversations about what should and should not change with the concert experience as we tried to build new audiences. As the "features" of a concert changed, we made sure that there were still strong ties up to the personal values of the audience."

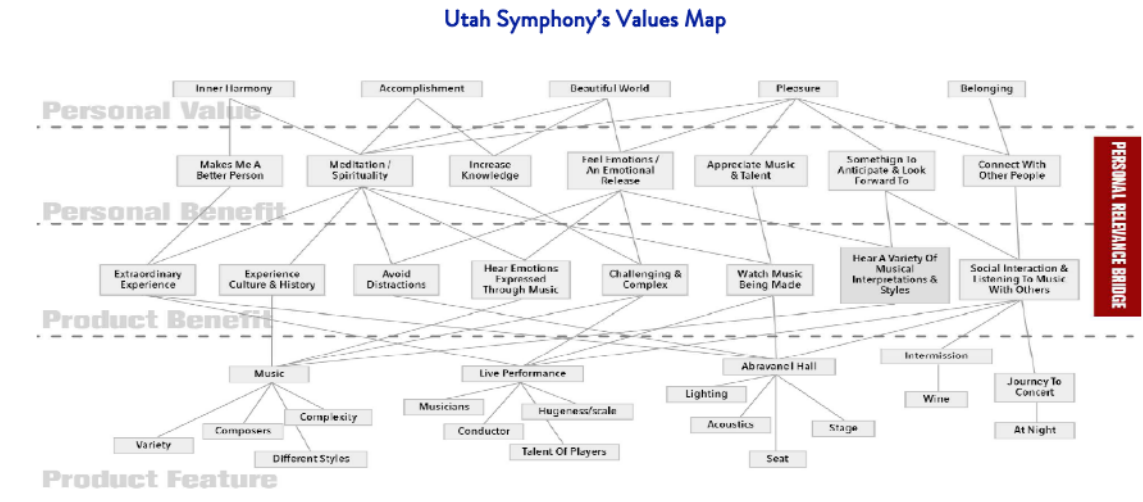
— Head of Marketing, Utah Symphony

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Even more importantly, values-based marketing brought a 7% increase in ticket sales of the Masterworks series, 16% increase in revenue and an 18% increase in reactivated ticket buyers.

Jonathan Miles, their head of marketing said that impact of the values research has extended well beyond audience communications. It has changed the way they frame decision-making generally around the patron experience.

Artifact: Utah Symphony's Complete Values Map



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This is the map of product features, product benefits, personal benefits and personal value that Utah Symphony created after running their ZMET interviews. You can see how they used audience interviews to make links between the functional and emotional elements of the experience.

This Pre-Work Has Four Parts



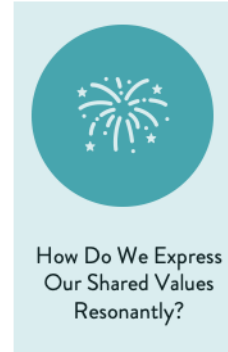
Why Again Do
Shared Values
Matter?



How Do We Clarify
Our Distinctive
Purpose?



How Do We
Discover Values
Audiences Share?

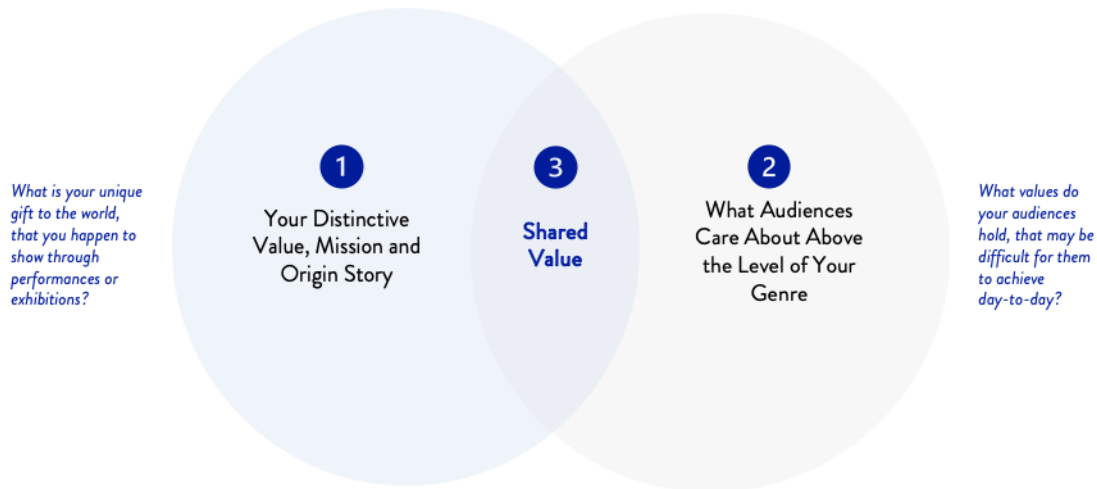


How Do We Express
Our Shared Values
Resonantly?

We will cover four areas in this pre-work:

- 1) A quick review of shared values and what we are hoping to accomplish by adopting a shared values strategy
- 2) A look inward to understand our distinctive purpose – the first step in defining our shared value
- 3) Methods to understand audience values to make sure our value is shared
- 4) **Key insights to expressing shared values in a way that will resonate with audiences – and other stakeholders**

How To Find Your Shared Value



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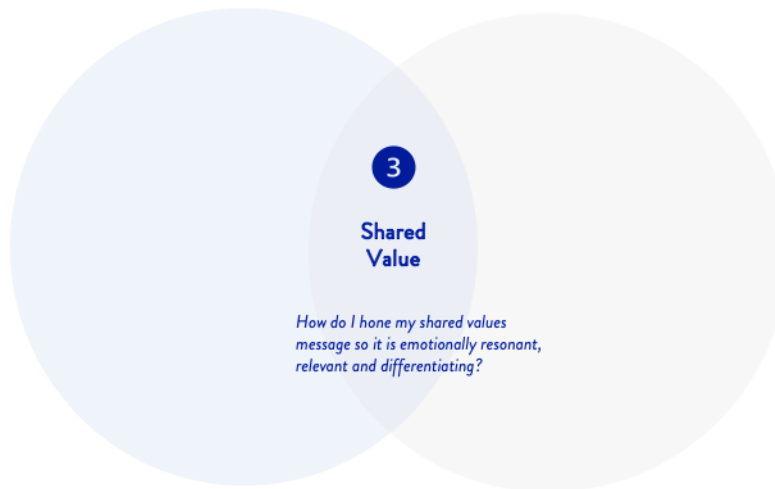
There are two parts to **shared** values – you, and the audience.

Fundamentally, shared values start with you. You need to examine your unique gift to the world, that you happen to show through performances or exhibitions. This requires a look back at your origin story, your distinctive value. By the way, this is –not- the same as strategic planning. A shared value is a –single- statement about what you stand for, above the level of the arts.

On the other side, you need to understand your audience too. What values do they hold that may be difficult to achieve? What will speak to them in this moment?

Last, you put those together and develop a deeply resonant shared values statement.

How To Find Your Shared Value



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We are not finished creating our shared value statement once we've looked into ourselves and understood our audience. We still have work to do to hone the message to be resonant, relevant and differentiating. Part of this is structured soul searching and part of this is coaxing values statements from audiences, but it's not like the answer just jumps out at you from those two data sets.

If you're able to push through to identify that shared value, then you've done something that matters deeply to your ability to drive loyalty and you've accomplished something whose difficulty is likely to differentiate you from others in the space.

There are obviously some tangible elements that we talked about before. The five elements of the definition: emotional, higher order, relevant, credible and differentiated. But there is a lot of judgment involved in determining whether a given value meets the bar in each element for a specific organization.

How Do These Mega-Brands Do at Expressing Purpose?



Apple exists to empower creative exploration and self-expression.



Coca-Cola exists to inspire moments of happiness.



Hermès exists to celebrate timeless luxury and craftsmanship.



Jack Daniel's exists to celebrate and evoke pride in personal authenticity, independence and integrity.



Mercedes-Benz

Mercedes-Benz exists to epitomize a life of achievement.



Starbucks exists to create connections for self-discovery and inspiration.

Source: *Grow: How Ideas Power Growth and Profit at the World's Greatest Companies*, Jim Stengel, 2011.

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When judging the quality of the shared value you come up with, there is a little bit of “know it when you see it” unfortunately. It’s useful to look at examples of some good ones and some not-so-great ones to get the “tuning” right. How do these brands do at expressing their purpose? Take a moment to evaluate them against the five criteria: emotional, higher order, relevant, credible and differentiated.

Mastercard and Visa Go Head-to-Head on “Purpose”



Mastercard exists to make the world of commerce simpler and more flexible.

vs.



Visa exists to provide freedom to people to follow their passions by providing better money for better living.

Does each competitor nail its statement of purpose?

Do they feel meaningfully different from each other?

Does one of them feel better positioned to connect emotionally with customers?

Source: *Grow: How Ideals Power Growth and Profit at the World's Greatest Companies*, Jim Stengel, 2011.

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It can be really helpful to contrast two shared purpose statements in the same industry. Which one feels more emotionally resonant? Do they feel meaningfully different from each other, so you know it is differentiated?

How Should We Express Our Shared Value?

Balance Aspiration
and Attainability

Identify and Resolve
Emotional Tension

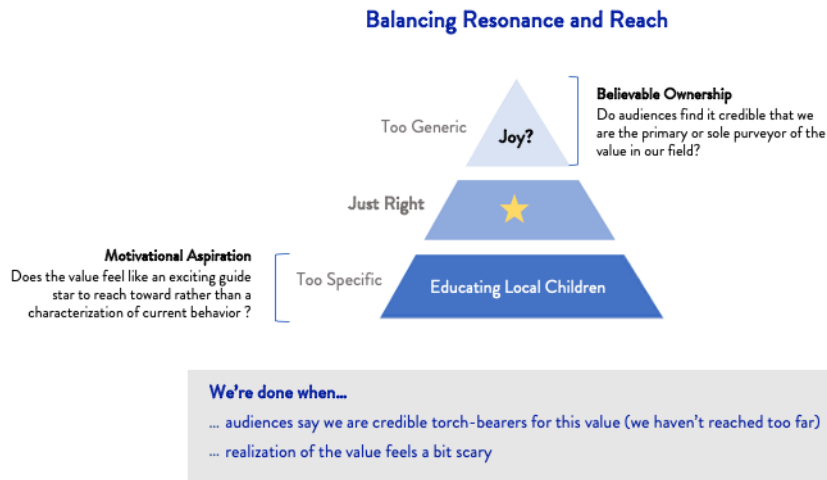
Translate Value into
Personal Benefits

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As we take our hypothesized shared value and turn it into a powerful expression of our purpose that we can communicate to audiences and other stakeholders, there are three key steps:

- 1) **We need to balance the level of the shared value – high enough to be aspirational, specific enough to point back to your organization**
- 2) We need to identify the specific emotional tension our audiences experience and how we help to resolve it
- 3) We need to translate the higher order value we've identified into a statement of personal benefits

Balancing Aspiration and Attainability



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Our shared value statement needs to carefully balance being too large and too specific. Often we see brands, in and out of the arts, try to claim something like “excellence” or “joy.”

Excellence is really important but there is virtually no way it is going to be your shared value because it fails on virtually every dimension. It’s hard to express emotionally without direct reference to artistic skill. It’s so lofty that it’s hard to make relevant in people’s lives. It’s a stretch to believe that one organization is going to own this value, to the extent it is a value, and it’s very hard to imagine that it will differentiate you, that others won’t try to claim it. Put this value into a “we believe...” statement and then see how many of your customers will be able to remember it or associate it with you in six months. The answer is not many.

On the other side, we want to make sure we are not being too specific. “Educating children in the Philadelphia area” is likely a characterization of current behavior. It will be emotional, but it won’t be motivating to the organization or likely have lots of emotional tension for an individual audience member.

We offer some guidance here for achieving the right balance. Would audiences say we are credible? Does it feel like a bit of a stretch compared to our current behavior?

Focusing Aspiration To Boost Credibility



Snow Beer exists to celebrate everyday moments of success.



The Smithsonian exists for the increase and diffusion of knowledge.



Louis Vuitton exists to luxuriously accentuate the journey of life.



Tsingtao exists to infuse the joy of life with the passion of Chinese brewing.



The Field Museum exists to protect the future through scientific progress.



Glaser exists to enable people to travel confidently knowing they are perfectly outfitted.

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To bring our aspiration down from something too generic (like “joy”) we can use three paths to limit our aspiration.

First, we can narrow the field – from joy to inner peace, perhaps to the ability to find peace when stress is highest. Second, we can focus our differentiation regionally. So if we can’t own a shared value nationally, perhaps we can own it for an area. Last, we can get very specific about the emotional benefits.

You can see an example of each on the right – a broad shared value owned by a large brand on the top, a more specific and differentiated shared value from the brand on the bottom in the same category.

Snow beer in China – the largest beer company in the world – claims ‘celebrate success’ while Tsingtao takes more regional focus with the passion of Chinese brewing.

The Smithsonian has a large field of play with ‘the increase and diffusion of knowledge’ while the Field Museum narrows that to ‘protect the future through scientific progress.’

Louis Vuitton talks about luxuriously accentuating the journey of life – which is admittedly both broad and hard to understand – while the smaller brand Glaser specifies the emotional benefits of being perfectly outfitted.

How Should We Express Our Shared Value?

Balance Aspiration
and Attainability

Identify and Resolve
Emotional Tension

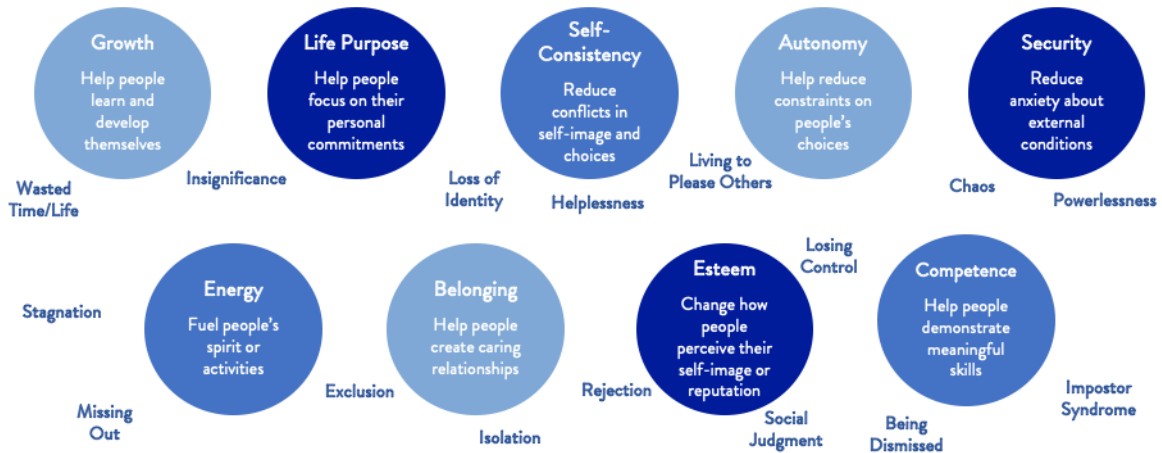
Translate Value into
Personal Benefits

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- 1) We need to balance the level of the shared value – high enough to be aspirational, specific enough to point back to your organization
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- 3) We need to translate the higher order value we've identified into a statement of personal benefits

Shared Values Resonate Most When They Resolve Negative Emotions

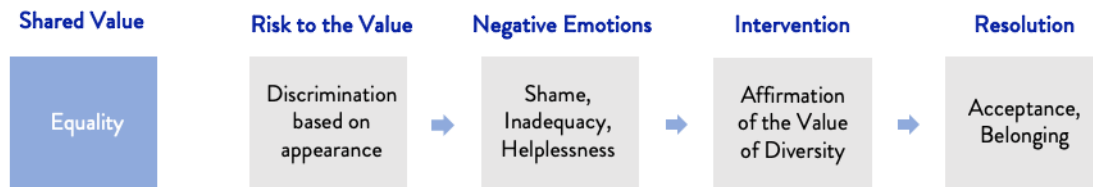


Source: Abraham H. Maslow, *Motivation and Personality*, (New York: Harper & Row); Edward L. Deci and Richard M. Ryan, "The 'What' and 'Why' of Goal Pursuit, *Psychological Inquiry*. Carol D. Ryff and Corey Lee M. Keyes, "The Structure of Psychological Well-Being Revisited."

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To find emotional tension, we return to the nine categories of identity. Each has several negative emotions affiliated with them (surrounding the circle) that can represent the tension an individual faces when trying to live the value.

The Story-Based Structure of Tension and Resolution



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Once we understand the tension, we need to tell the story of resolving that tension in our marketing communications. It typically follows this cadence. We start with the risk to the value, then explain the negative emotions that arise from that risk. It is followed by an intervention which leads to resolution.

Oreo Uses Tension To Create Emotion around Its Core Value

A Loving World Starts with a Loving Home

Will Dad accept my partner?



It's Not Looking Good



Dad Gets Emotional Nudges



Shared Value Resolves Tension



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Oreo followed this story with their Proud Parent video: <https://youtu.be/EpfLkISG2dQ>.

You can see the initial risk to the value of family acceptance. The protagonist feels pretty negative as she gets signals that her father is unhappy with her and would prefer a traditional family structure. Then the intervention comes in the form of a neighbor's nosiness and the mother's silent disapproval of her husband. Resolution comes in the form of a public commitment to acceptance through a grand gesture.

This classic storytelling technique brings resonance to almost any shared value statement.

How Should We Express Our Shared Value?

Balance Aspiration
and Attainability

Identify and Resolve
Emotional Tension

Translate Value into
Personal Benefits

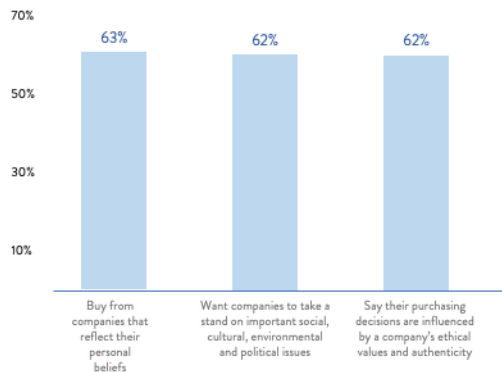
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As we take our hypothesized shared value and turn it into a powerful expression of our purpose that we can communicate to audiences and other stakeholders, there are three key steps:

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Consumers Are Increasingly Buying Based on Purpose

Consumer Perceptions about Purpose-Led Companies



Source: wwwAccenture.com/brandpurpose

Especially Important for Younger Audiences



“What we hear from **millennials** is that they don’t want to buy stuff, they want to buy into stuff. They want to buy into brands that share their values and share their purpose.”

Rick Gomez
CEO, Target



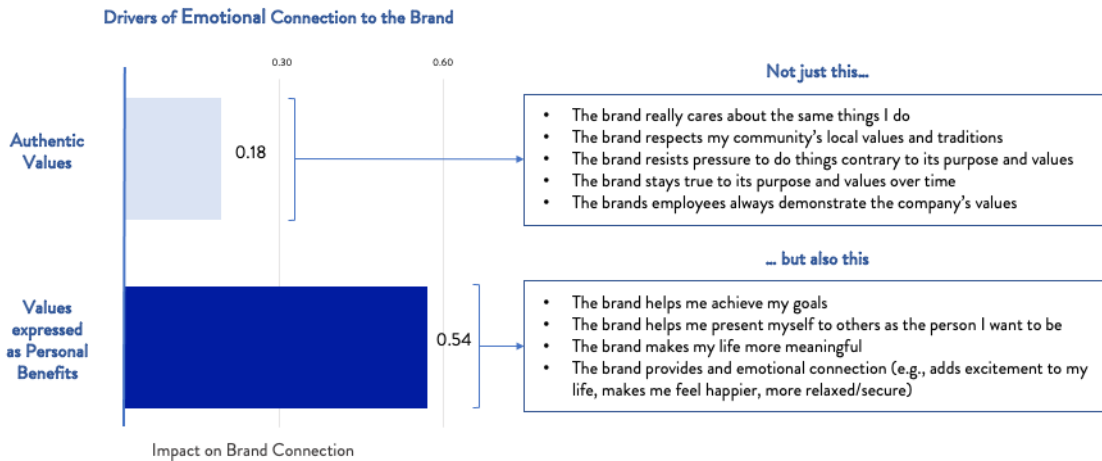
“We’ve long held data that shows if you invest in purpose, you’re able to attract better talent, retain the people you have, and drive sales. This is what **millennials** expect.”

Emily Callahan
Chief Marketing and Experience Officer,
St. Jude’s Children Research Hospital

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Consumers are increasingly making purchase decisions based on a sense that the company stands for something – especially younger audiences. Here we show some data from Accenture about consumer perceptions about purpose-led companies, and some large company C-suite members who testify to the value of purpose-led marketing.

Building Connection Requires Translating Values into Benefits



Source: CEB 2017 Corporate Brand Survey. Multiple regression analysis ($R^2 = 0.84$)

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Shared values are about an ideal that people see a brand as representing, but, while they want the brand that lives its values, they want the benefits of that value to be expressed personally.

CEB research on brand connection that looked at impact on consumers as well as other stakeholders like employees and shareholders gave us another level of detail about the power of shared values. While this research reinforced the importance of shared values generally, it found that the shared value was more powerful when expressed as a personal benefit.

So, people might think “that organization cares about the same things I do,” but the level of connection people feel to the brand is three times higher if they believe things like “the brand helps me achieve my goals,” or “the brand makes my life more meaningful.”

Best Buy Asks Customers To Translate Values into Outcomes

Desired Customer Outcomes Offer Tangible Places Where Best Buy Can Deliver Benefits of Shared Value



Source: Best Buy

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Best Buy is a good example of taking a broad shared value and turning it into personal benefits. Best Buy took their customer values then turned them into not only benefits but tangible benefits *delivered by the company*. The three examples certainly harken back to Utah Symphony – but Best Buy has taken it a step further. For example, for “control,” Best Buy has made it clear how their Geek Squad tech support can make sure your computer is set up to keep track of the kids’ schedules, or help you stay on budget. (Admittedly, it’s hard to imagine how Best Buy helps customers with hiking or spending time outdoors, but I’m sure they had a plan!).

No matter what, what they have done better than most is they asked customers authentically how they express the value and then chose where to plug in. They didn’t just assume the value comes directly from the products they sell.

How to Get to Your Shared Value

Developing an Authentic Hypothesis

1. Your Deepest Beliefs

Why were we created?
What is our origin story?

2. Moments of Truth

What highlights from our history show us at our best? When have we have fallen?



3. Personal Yearning

Of all the struggling moments where audiences want to better themselves, where are we best positioned to help?

4. Points of Difference

How are we different from organizations with similar capabilities in a way that helps people make progress in their lives?

We're done when...

- ... it resonates emotionally when we tell people about it
- ... it feels authentically to staff/donors/loyal audiences like 'who we are'
- ... it feels different than what another organization in our genre would say

Balancing Resonance and Reach

5. Motivational Aspiration

Does the value feel like an exciting guide star to reach toward rather than a characterization of current behavior?



6. Believable Ownership

Do audiences find it credible that we are the primary or sole purveyor of the value in our field?

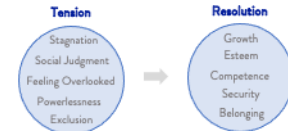
We're done when...

- ... audiences say we are credible torch-bearers for this value (we haven't reached too far)
- ... realization of the value feels a bit scary

Contextualizing the Value for Meaning

7. Relevant Expression of Tension

Is the value expressed as a solution to real issues/challenges/tensions audiences are currently facing?



8. Credible Values Leadership

Do our actions feel like meaningful, authentic and even courageous support of audiences trying to live the shared value?

We're done when...

- ... audiences tell us stories related to the value
- ... our staff (and other) stakeholders feel pride/motivation in the articulation of purpose

This page is the most important in this deck. You may want to print it and use it as your guide as you develop a shared value.

It is a summary of all activities necessary to build a shared value statement and some tests to know if you are ready to move to the next stage.

Shared Values That Risk Missing the Mark

Brand: Green CPG
Shared Value: We believe in doing the right thing.
What's Missing: Relevance

Brand: Orchestra / Opera
Shared Value: We believe in connecting the community through great live music.
What's Missing: Differentiation, elevation above category

Brand: Entertainment
Shared Value: We believe in the magic of movies.
What's Missing: Differentiation, elevation above category

Brand: Children's Museum
Shared Value: We believe that learning is a joy.
What's Missing: Emotional tension

Brand: Auto
Shared Value: We believe in the freedom and fun of open roads.
What's Missing: Ability to tap higher-order emotions

Brand: Ballet Company
Shared Value: We believe in awakening and uplifting the human spirit.
What's Missing: Credible ownership, differentiation

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Here are some examples of not-so-great shared values, and what's missing. Now that we've talked in more detail about what makes a great shared value these should be clear.

There was a consumer products company that focused making "green" products. It described its shared value as "doing the right thing." On the one hand, they aimed too high. It seems like a leap from green products to "doing the right thing". It's not clear what the relevance of that value is to the green space, and it's not especially credible that they could own the notion of doing the right thing.

On the other side of things, we saw an orchestra with the following shared value: "We believe in connecting the community through great live music." It's hard to think about using that statement as a rallying cry. They aren't really lifting up above their genre. Also, it wouldn't be too hard to import that statement to any other orchestra, basically anywhere. It's hard to believe we're going secure emotional connection there.

Evaluating the Strength of Your Shared Value

| | Emotional | Higher Order | Relevant | Credible | Differentiated |
|--------------------------|--|---|--|--|--|
| Good | Does your audience care about it? | Does this value extend beyond your art form? | Is this value relevant to both you and your audience? | Is the value consistent with your previous brand positioning? | Is this value related to your unique strengths as an organization? |
| Strength of Shared Value | Do your audiences see this value as part of their identity? | Does this value open up new opportunities for audience conversations, partnerships, etc.? | Is this value related to societal trends and rising beliefs or values? | Do your programs demonstrate this value? | Could other arts organizations in your area own this same value? |
| Best | Does not living this value create emotional tension for your audience? | Could this value attract new audiences to engage with your organization? | Is this value related to issues of burning interest to your audience? | Could your audience state your shared value and how you live it? | Could this value turn some people away from your brand? |

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Shared values is a journey – you can start with good statements and make them better. Here we show how you can progress in each.

Considerations for Your Own Shared Value

| EMOTIONAL | HIGHER ORDER | RELEVANT | CREDIBLE | DIFFERENTIATED |
|---|--|--|--|---|
| Based on feeling and emotions, rather than programmatic attributes | Must have meaning in the consumer's broader life, not just in his or her interaction with the category | Must be relevant to the consumer and the category | Reflects something the the brand genuinely embodies or supports | Stems from the qualities that make a brand truly unique |
| Is there an underlying tension or 'struggling moment' we can resolve? | Is it above the level of your genre (theatre, opera, etc.)? | Can we translate the value into personal benefits? | Have we demonstrated our support for this value in the past? | Is the value based in our deepest beliefs? |
| Is it aspirational for you and the audience? | Would you start a movement around this? | Is it directly related to cultural conversations taking place right now? | Is the value big enough to contain our activities but specific enough that it is attainable? | Could another organization like us claim this value? |

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There are some ways you can tell if you are “done” creating a shared value, or close to it. Here are the litmus tests we shared in our peer sessions last week. You can add to these some additional questions:

Put it in front of some staff and audiences.

Do they find it moving?

Do they find it clarifies something they've been thinking but have found hard to put into words?

Can you envision “starting a movement” around this value in the same way that Ben & Jerry's rallies to save the planet or Dove works to promote self compassion?

Can we point to “proof points” in our own past where we came out in favor of this value, especially when it involved sacrifice or risk? Is there evidence of the shared value in our origin story?

Is it almost comical to think about similar organizations trying to claim ownership of this value in our stead?

Can we identify a dozen moments where we could help audiences make tangible progress to overcome 'struggling moments' in service to this value?