



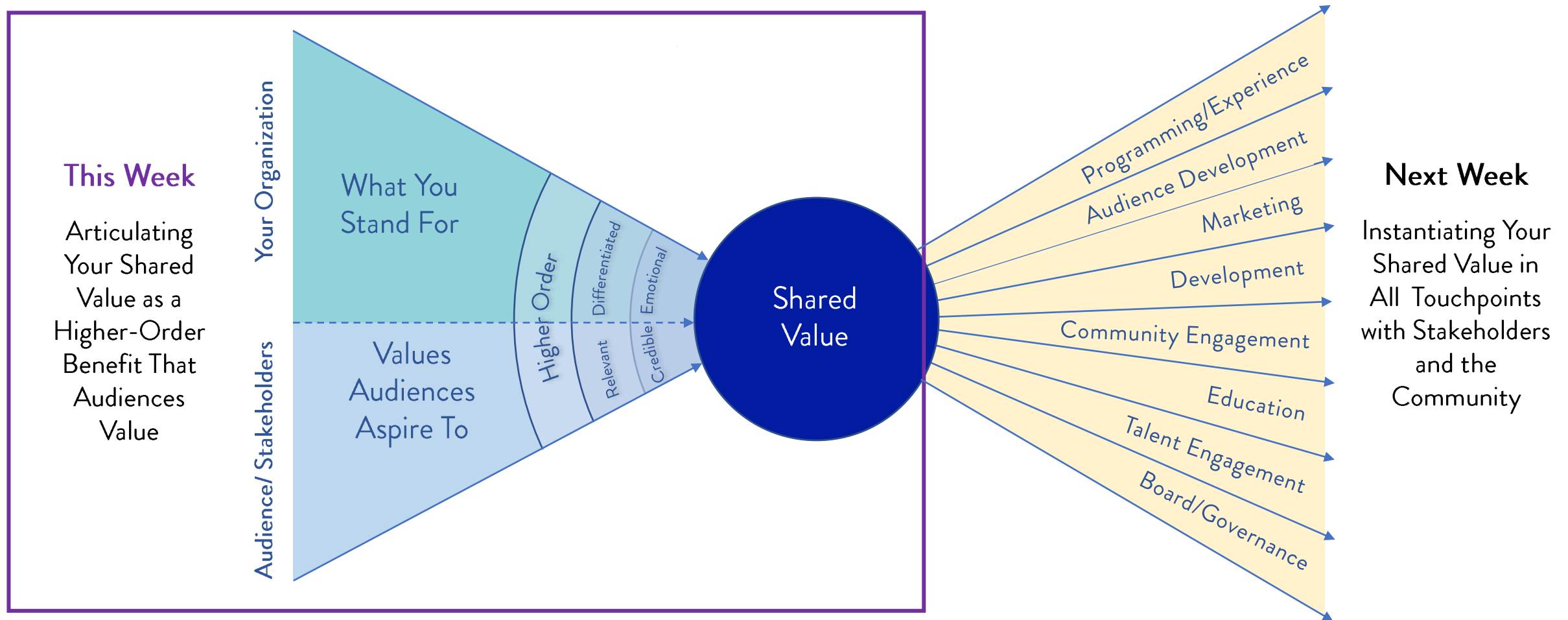
ADVISORY
BOARD
for the ARTS

Transforming Arts Organizations Worldwide

Articulating Your Shared Value

November 2020

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

This Pre-Work Has Four Parts



Why Again Do
Shared Values
Matter?



How Do We Clarify
Our Distinctive
Purpose?

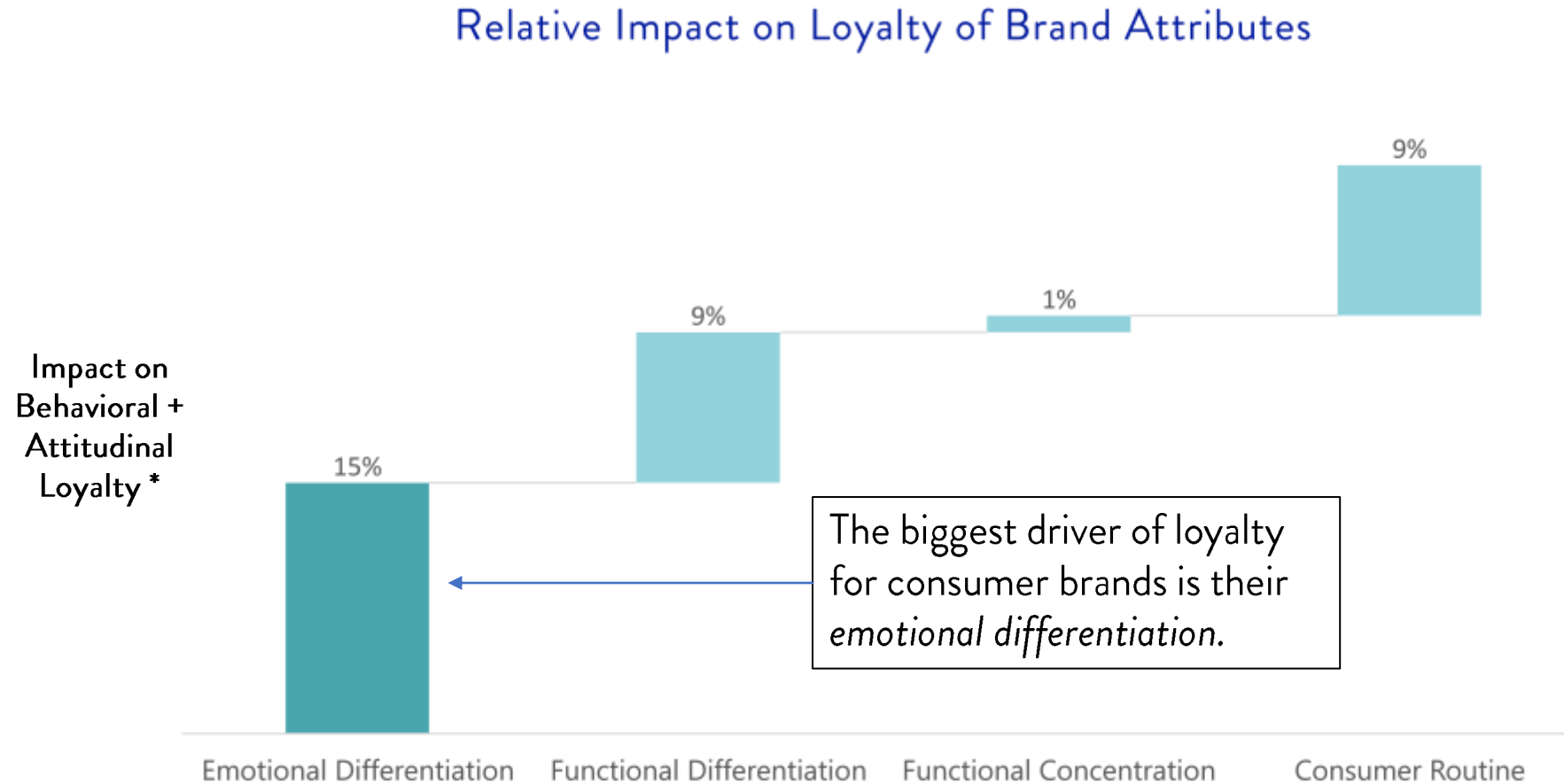


How Do We
Discover Values
Audiences Share?



How Do We Express
Our Shared Values
Resonantly?

The Key to Boosting Brand Loyalty is 'Emotional Connection'



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

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

Consumer Perception of Variation in Performance among Brands

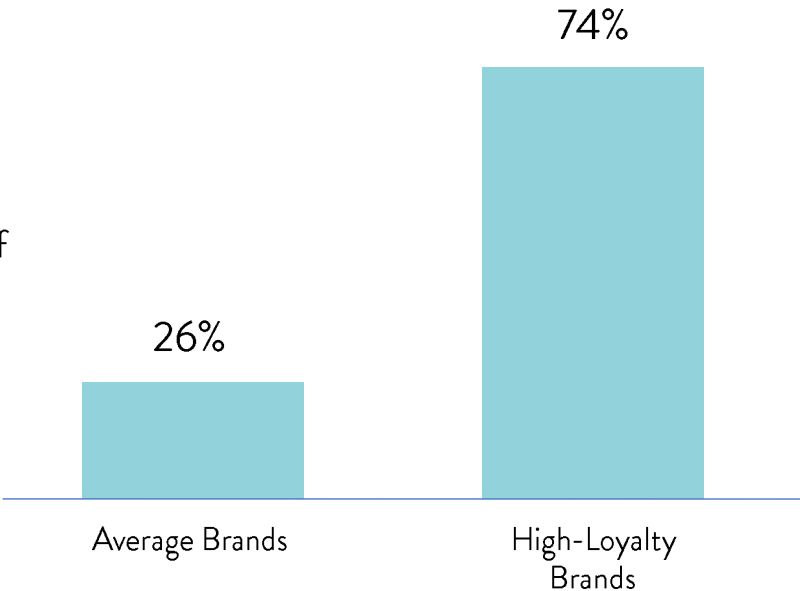


... and they are three times more likely to associate higher-order emotional attributes to high-loyalty brands

Perceived "Ownership" of Shared Values

Category Leadership on Higher-Order Emotional Attributes

Consumer Perception of Brand "Ownership" of Higher-Order Emotional Attributes



Shared Values Achieve a More-Intense Bond in the Arts

Higher Order



Level of Emotional Connection



Lower Order



Performance Benefit

Generating excitement around functional/factual aspects of the performance

Examples:

- Famous artist
- Well reviewed
- Popular show



Emotional Benefit

Drawing attention to emotional aspects of the value proposition

Examples:

- Connect with others
- Experience range of emotions
- Spend time on self care



Shared Value

Connecting your purpose to beliefs that your target audience holds dear

Examples:

- Everyone deserves to feel a sense of belonging
- Experience range of emotions
- A healthy community starts with healthy minds and bodies

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.

Key Characteristics of a Shared Value

EMOTIONAL

Based on feeling and emotions, rather than programmatic attributes

HIGHER ORDER

Must have meaning in the consumer's broader life, not just in his or her interaction with the category

RELEVANT

Must be relevant to the consumer and the category

CREDIBLE

Reflects something the the brand genuinely embodies or supports

DIFFERENTIATED

Stems from the qualities that make a brand truly 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.

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.

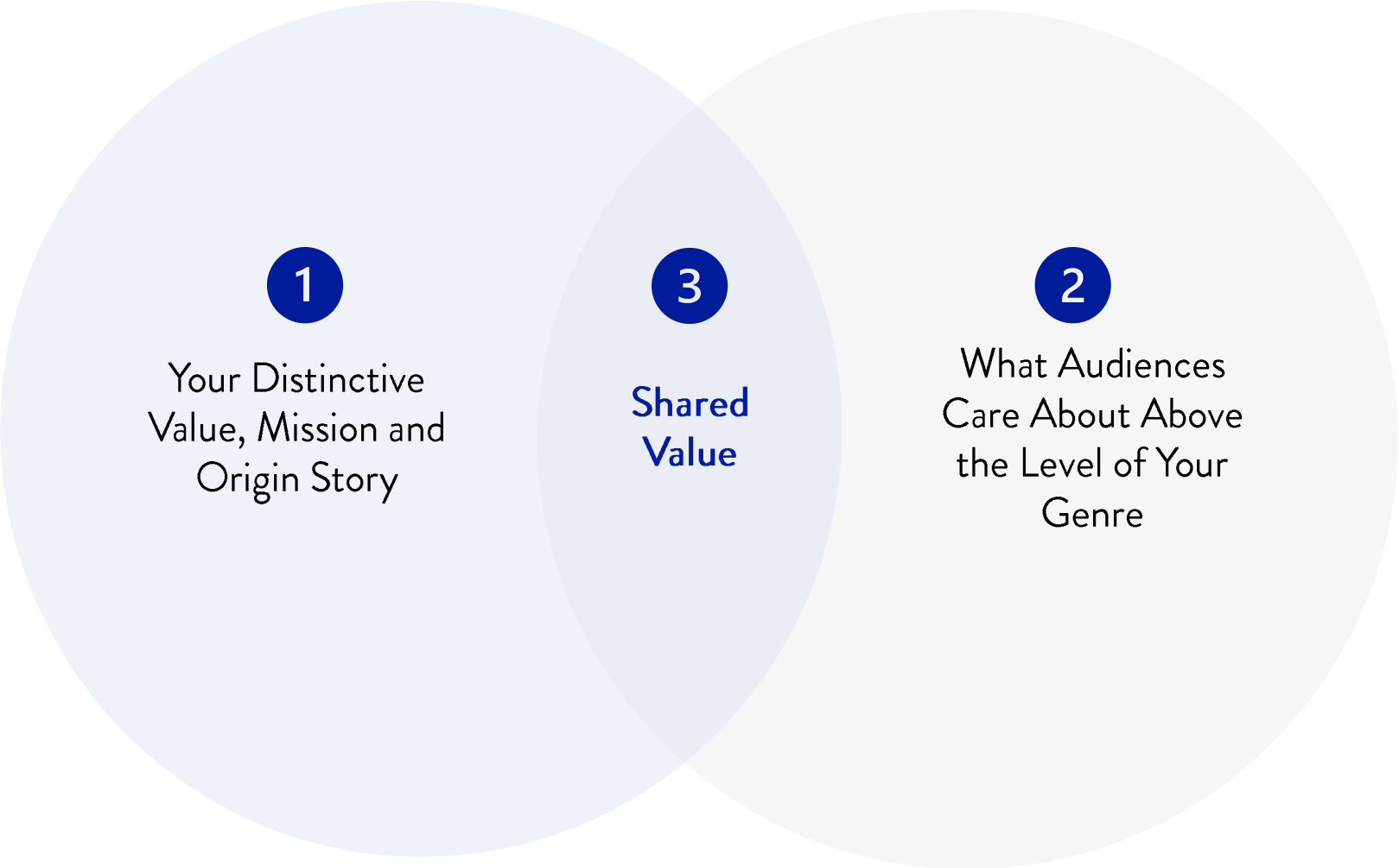
The Long-Term Opportunity

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**.

How To Find Your Shared Value

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



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

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

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Separating a 'Shared Value' from Similar Concepts

What It Is

Shared Value

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

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

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

Values

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

How We Talk About It

We believe...

We exist in order to...

Therefore, we want to create a future that looks like ____...

The future we will work toward is...

We will bring that vision into reality by...

We behave according to ...

We will seek partners who...

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.

A Starting Point for Brainstorming Shared Values

Growth

Help people learn and develop themselves

Life Purpose

Help people focus on their personal commitments

Self-Consistency

Reduce conflicts in self-image and choices

Autonomy

Help reduce constraints on people's choices

Security

Reduce anxiety about external conditions

Energy

Fuel people's spirit or activities

Belonging

Help people create caring relationships

Esteem

Change how people perceive their self-image or reputation

Competence

Help people demonstrate meaningful skills

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."

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?

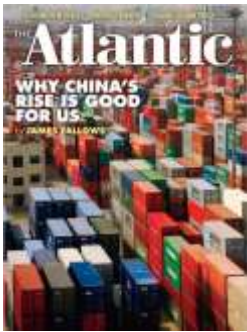
Who does Organization X fight for/stand up for/protect/support?

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

A Return to Roots at *The Atlantic* Magazine

Social Media Strategy: Take One

Long 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

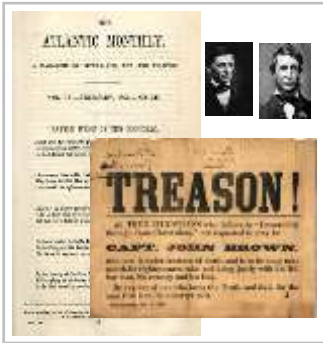


Short-Form Content

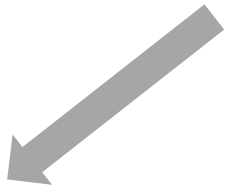


Social Media Strategy: Take Two

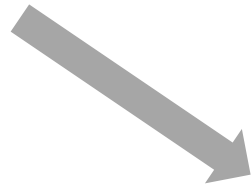
The Idea of *The Atlantic*: BRAVE



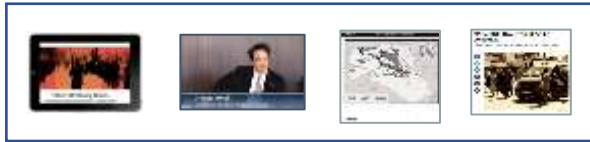
After initial slow progress, the magazine went back to its purpose, beginning with its abolitionist roots. It reconceived long-form and social content as separate, equally important manifestations of that purpose.



Long Form Content



Short-Form Content



The Inspirational Power of an Origin Story

The Historical Roots of 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”



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.

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

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

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.

Community Engagement

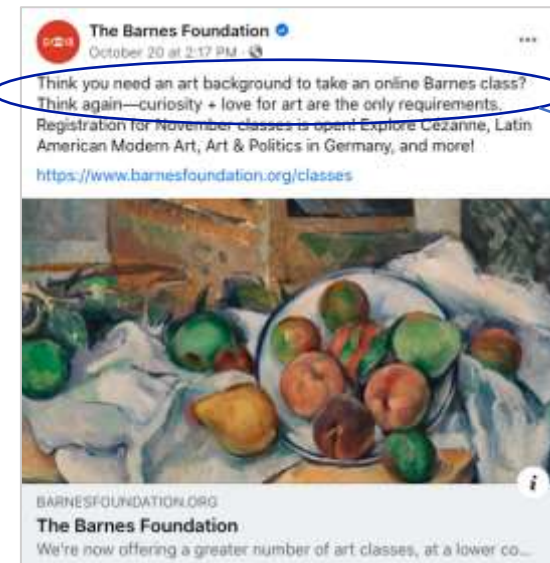
Targeting young people with an engaging entry point to STEM is right in line with the Dewey teaching philosophy that Barnes favored.

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.



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.

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Purpose?



How Do We
Discover Values
Audiences Share?



How Do We Express
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Resonantly?

How To Find Your Shared Value

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



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

Learn What Your Customers Yearn For

2

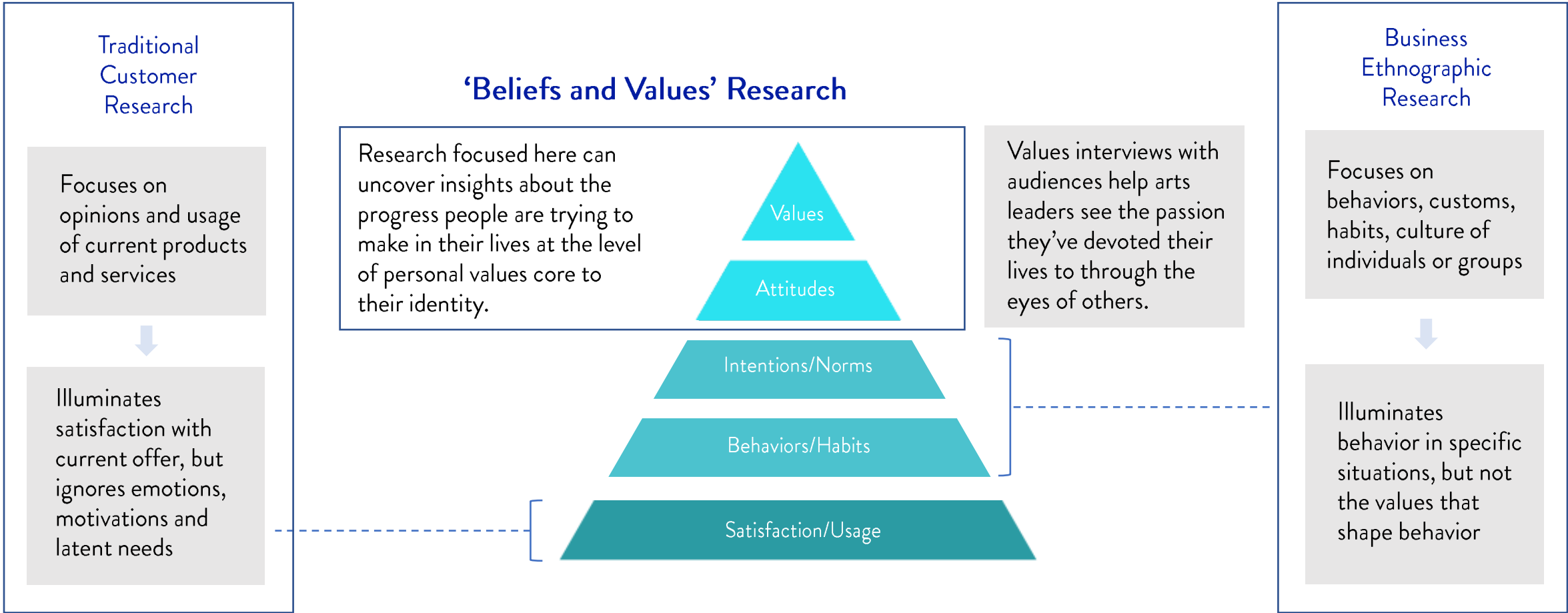
Found through
structured interviews
with loyal audiences

2

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?*

For Insight About Values, Ask Different Questions



Case Study: Identifying Relevant Customer Values



Structured 'Values' Interviews

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.

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

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.



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.

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

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.

Analyze Customer Feedback to Identify Customer Values

Key Phrases from Interviews

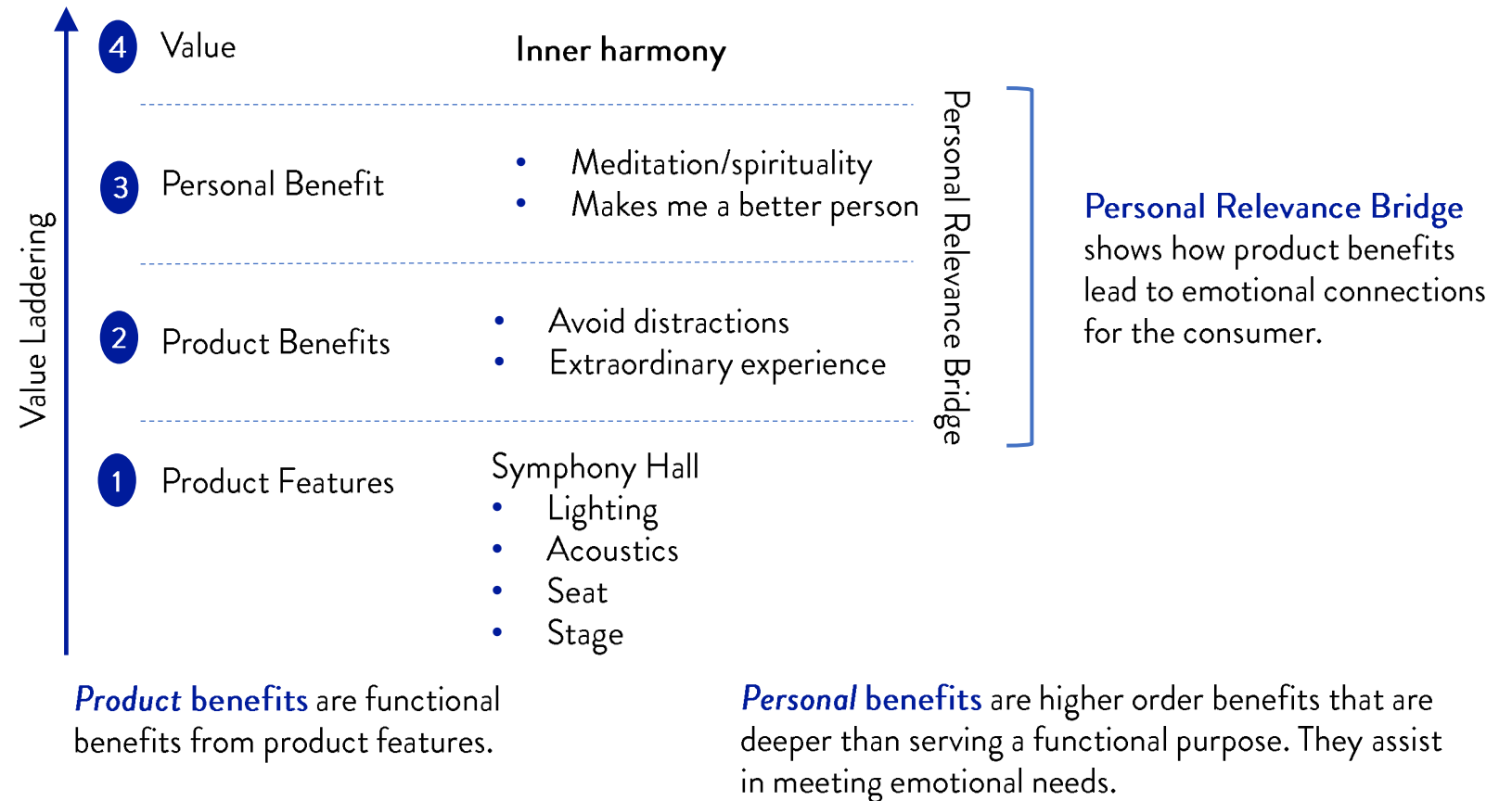
“I feel at peace when I am sitting in my seat.”

“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



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.

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.

Program-Based Marketing (Pre-2018)



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

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

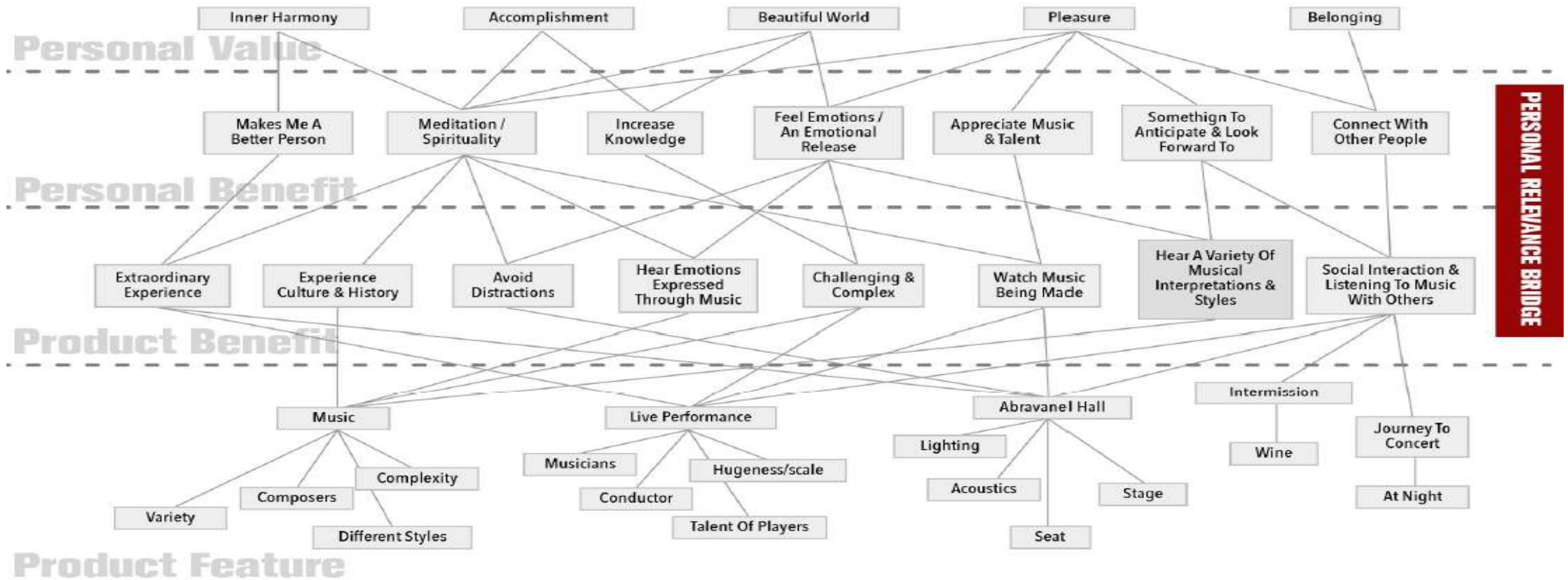
“The research and **values mapping** has shifted how we talk **internally about our patrons** and the role the symphony plays in their lives. It has helped frame decision making related to the patron experience.

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

Artifact: Utah Symphony's Complete Values Map

Utah Symphony's Values Map



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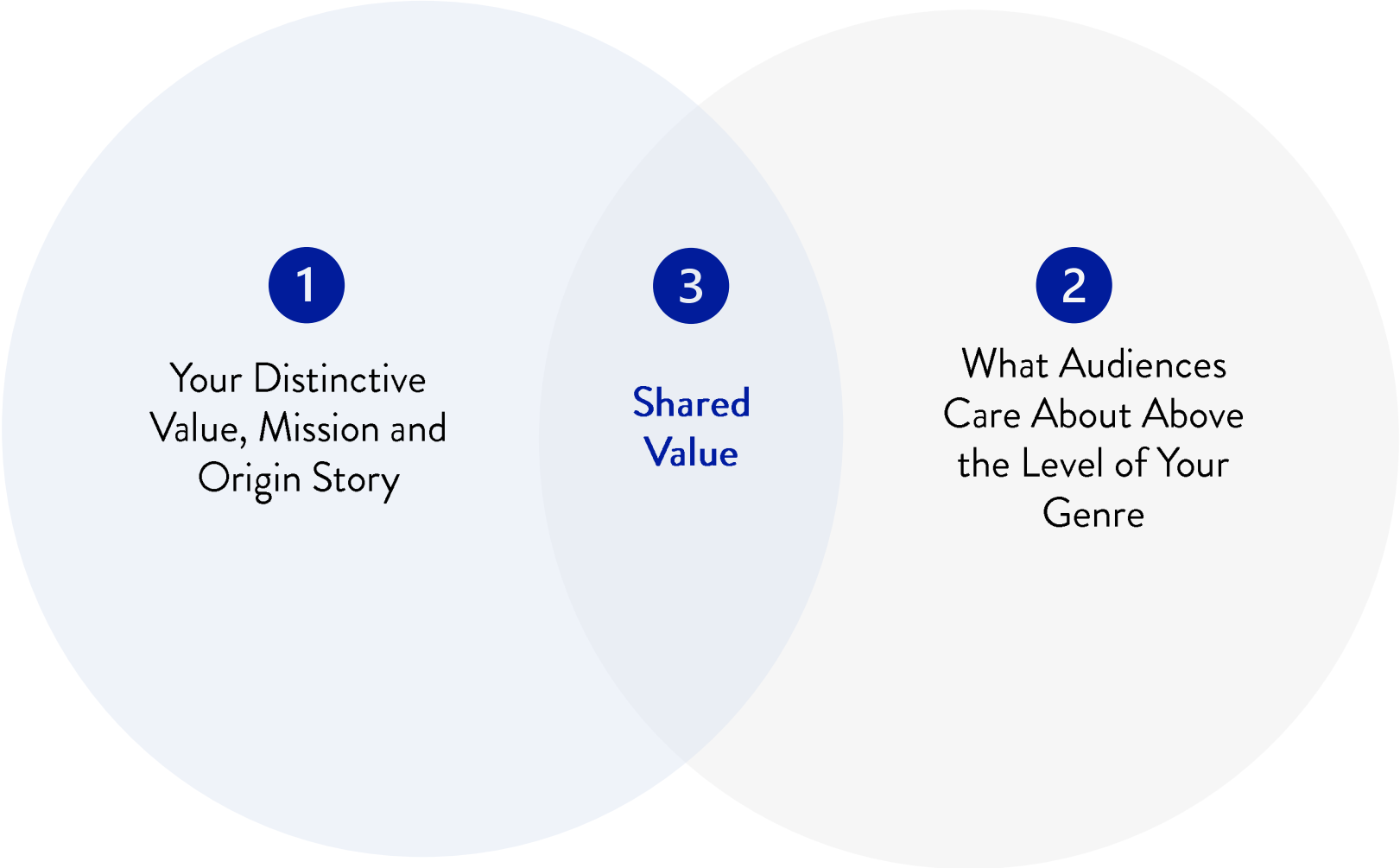
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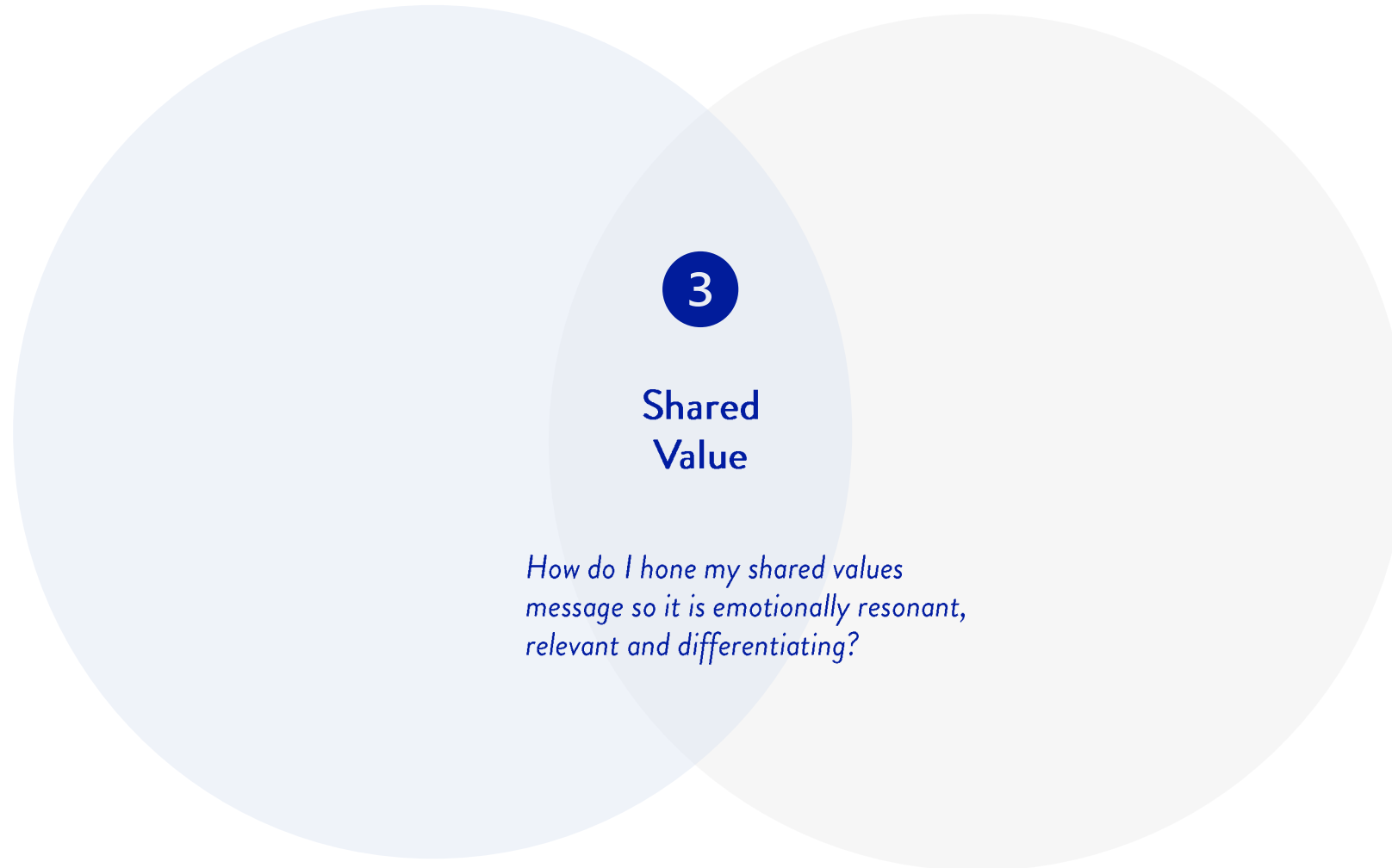
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How To Find Your Shared Value



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

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



vs.



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

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.

How Should We Express Our Shared Value?

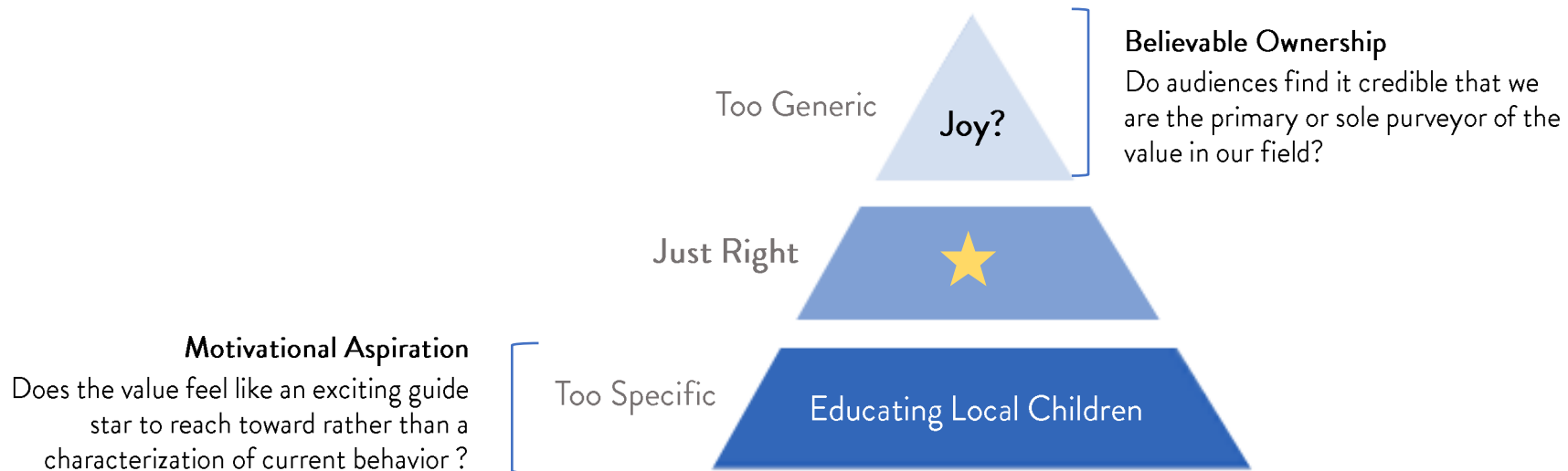
Balance Aspiration
and Attainability

Identify and Resolve
Emotional Tension

Translate Value into
Personal Benefits

Balancing Aspiration and Attainability

Balancing Resonance and Reach

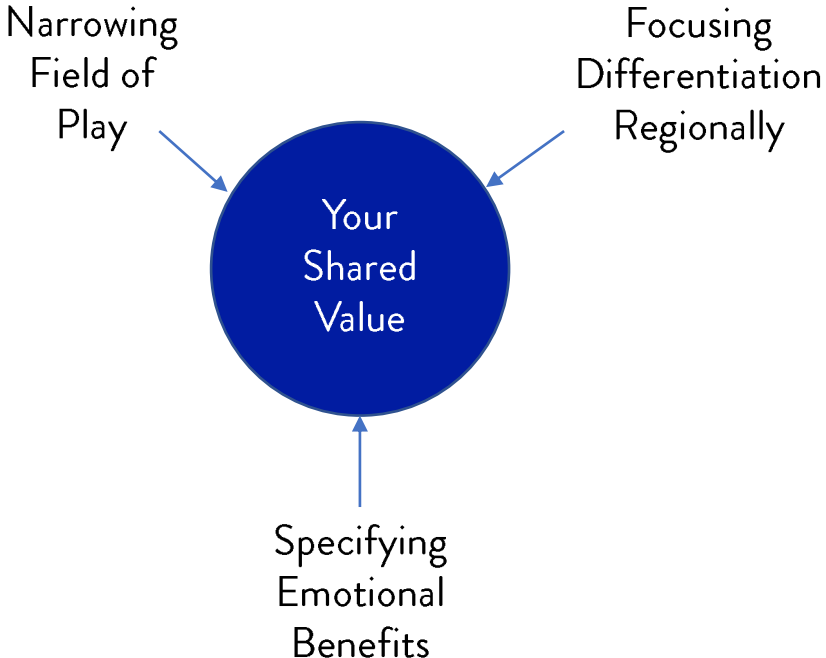


We're done when...

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

Focusing Aspiration To Boost Credibility

Useful Paths to Limiting Aspiration



Snow Beer exists to celebrate everyday moments of success.



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



The Smithsonian exists for the increase and diffusion of knowledge.



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



Louis Vuitton exists to luxuriously accentuate the journey of life.



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

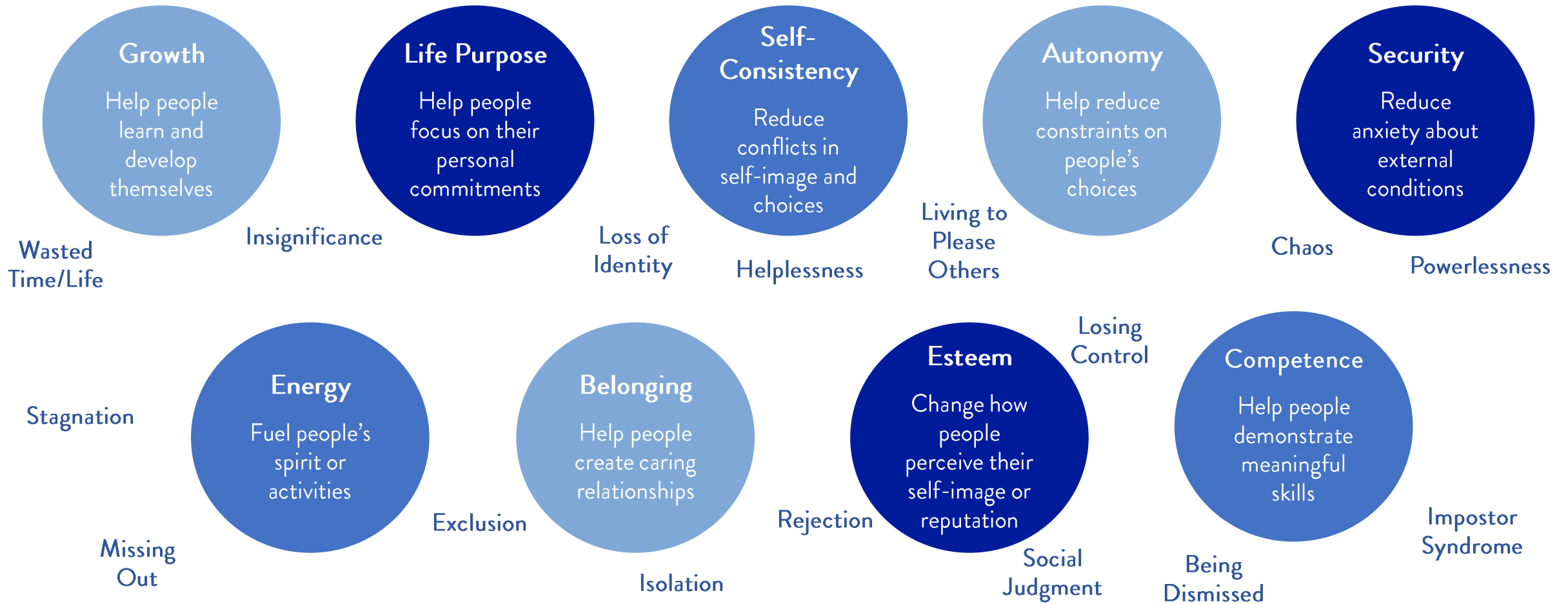
How Should We Express Our Shared Value?

Balance Aspiration
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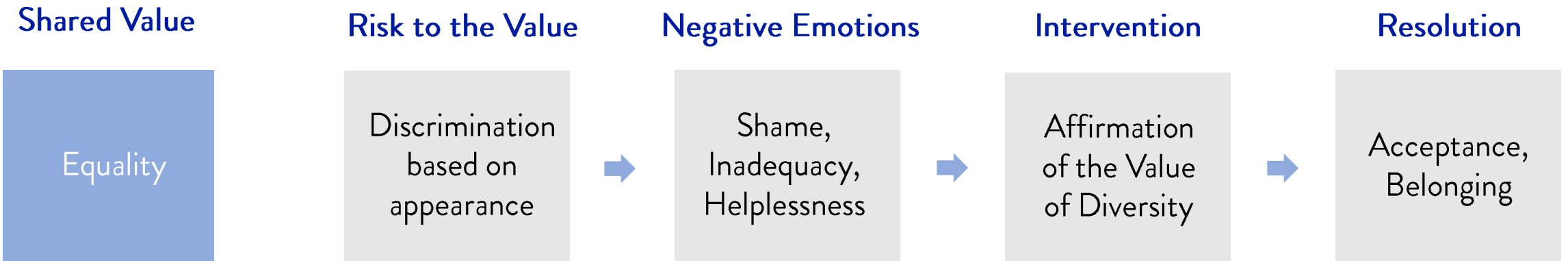
Translate Value into
Personal Benefits

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."

The Story-Based Structure of Tension and 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



How Should We Express Our Shared Value?

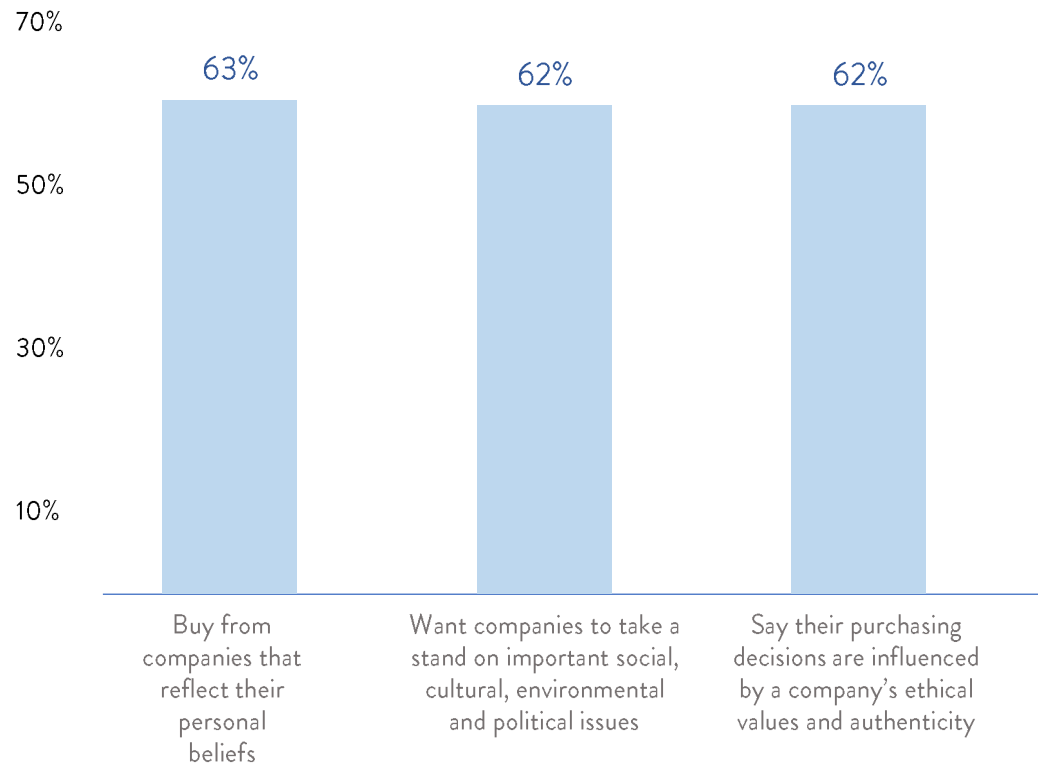
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Consumers Are Increasingly Buying Based on Purpose

Consumer Perceptions about Purpose-Led Companies



Source: www.Accenture.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

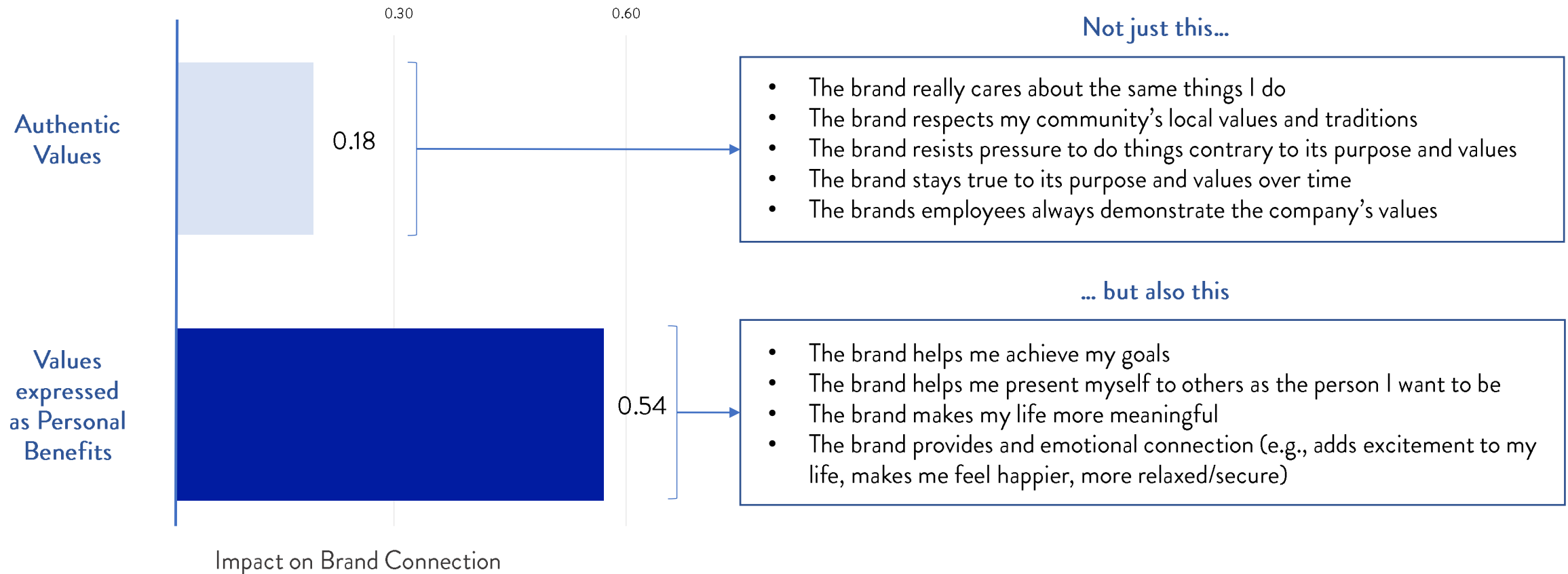


“We’ve long held data that shows if you invest in purpose, you’re able to attract better talent, retain the people you have, and drive sales. This is what **millennials** expect.”

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

Building Connection Requires Translating Values into Benefits

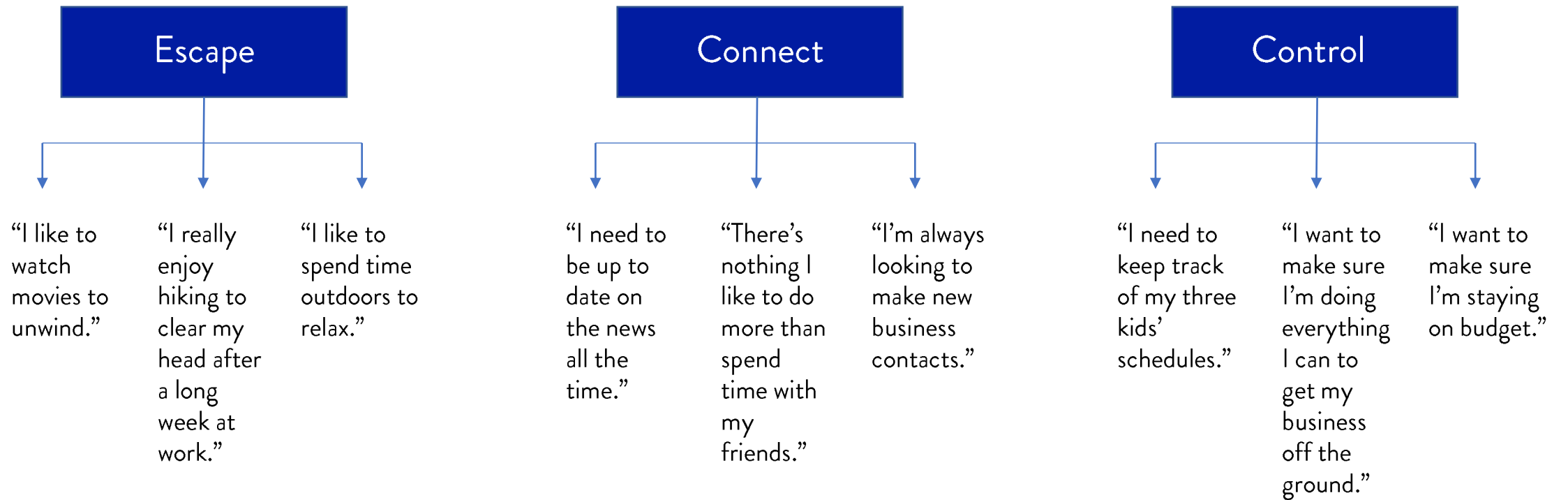
Drivers of Emotional Connection to the Brand



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

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

How to Get to Your Shared Value

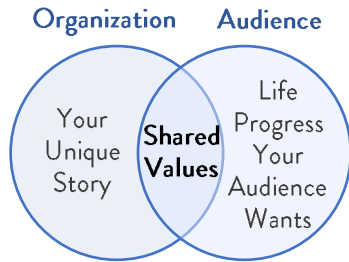
Developing an Authentic Hypothesis

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?

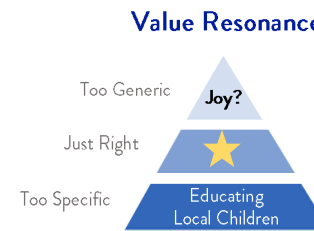
We're done when...

- ... 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?

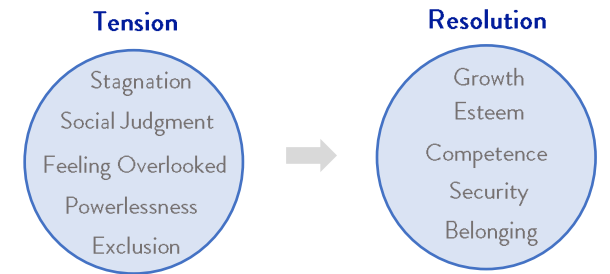
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- ... realization of the value feels a bit scary

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


Shared Values That Risk Missing the Mark


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

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

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

 **Brand:** Orchestra / Opera
Shared Value: We believe in connecting the community through great live music.
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:** Ballet Company
Shared Value: We believe in awakening and uplifting the human spirit.
What's Missing: Credible ownership, differentiation

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?

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?