A few years ago, I was summoned to visit with a client’s marketing team to discuss plans for a new brand campaign for a well-known bank. To protect the innocent (and myself), let’s just call it the Last National Bank. I listened intently through eight hours of charts, diagrams, research summaries, and shifted paradigms. My job was to sift through all this information to find the unique selling proposition, or USP, and articulate it in a creative brief. At the conclusion of the meeting, the client asked to see the start of a creative brief the next morning. I saw this merely as a test to see if we were listening. Since I had been writing the brief in my head all day and merely needed to play back words on paper, I responded with a confident yes, without hesitation.

The next morning, as I sat in my hotel room over coffee and the dreaded thought of another eight-hour meeting, I started filling out the brief. As I was writing, I caught myself asking questions like, “Will they prefer this word over that?” or “I wonder if they’ll be tripped up by the way I paraphrased their diagram,” etc. As I was tying myself up in rhetorical knots, the phone rang. It was my colleague asking how long it would be before we could show them their brief. It was in that moment that everything changed.

“Let me call you right back,” I said.

I suddenly realized what I was doing and why, perhaps, I deserved that “suit” epithet. Their brief. I was writing their brief, as I had so many times before, simply to win their approval: to assuage the client’s concerns and let them know that “we get it.” Not once while writing did I ask myself if my words would trigger creativity, inspire new thinking, or truly help the creative team understand the prospective buyer’s problem. For instance, this brief was asking for facts about the prospect, such as demographics, psychographics, ranked importance of features—things that could be assigned a number. And if there was anything said about the emotional state of the prospect, the description had to be stated as an explanation of how the prospect might be feeling (e.g., “the prospect is psychologically distressed, despondent, and feeling a certain level of anxiety over his lack of control”). Beyond this there was very little that would help anyone know what it was like to be this prospect or to help anyone empathize with his or her perspective.

I called my colleague back and said, “Give me an hour.”

I quickly finished the brief as directed. But then I tried something unorthodox to see what would happen.

Instead of using descriptive language, I wrote a short memoir, delivered in the first person as if I were the prospect. As such, I described who I was and the problem I was having that needed a solution. While writing it, I became like a novelist writing a mini-story that would help readers identify with the prospect. In the end I had translated the brief into something that had more of an emotional
core—something that enabled the reader to vicariously feel the way the prospect feels.

An hour later, I took both the brief and the memoir to the client. Sitting across from them at a large table, I ticked off the questions and answers in the brief and received a round of approving statements from the group. Having made it over that hurdle, I then passed out the new document I had written.

“I have something else that I want to share with you,” I said, to the surprise of the rest of my team. I told the client I wasn’t happy with the way I had described the prospect in the creative brief. I further told them that they needed something more than a USP.

“Huh?”

“In order to create advertising that will resonate with your prospects, I think we have to do a better job of empathizing with them,” I said.

As everyone looked at me quizzically (actually, sneeringly is a better way to describe it), I was given the green light to read what I had written. This is the story I told:

Hi, I AM your prospect.

Ever since I’ve had enough money to need a bank, I’ve been listening to banks tell me about how much they care, how friendly they are, and how their customers are really, really happy. And I always have the same reaction: Do you actually expect me to believe that? And who cares? I sometimes wonder if there’s a bank out there that knows who I am and what’s most important to me.

Don’t get me wrong. I don’t expect the red carpet to be rolled out when I come into the bank. That’s not what I mean by knowing me.

Knowing me is knowing that I expect my bank to get the basics done right. Like an easy-to-read, accurate statement. Like not being put on hold for fifteen minutes when I call in with a question. Like not penalizing me for using an ATM instead of a teller. Those are just some of the basics, the cost of doing business. And if that’s all a bank is doing, then it needs to try a little harder.

Knowing me—I mean really knowing me—is understanding just how busy I am. Show me, don’t tell me that you realize this. Somehow, let me know that you know I have a demanding job, a family, and a relentless to-do list and a number of other pressures I have to deal with regularly.

Knowing me is knowing that banking is not one of my biggest priorities in life. I don’t have the time for a bank that is going to slow me down, so give me some new ideas that will make banking less of a chore. In fact, give me some ideas that will make my entire financial life easier.

And hear this: I don’t care how big you are. I don’t care how friendly you think you are. And I certainly don’t care that you never sleep or that together we can make all my dreams come true.

The solution? It’s simple. In fact, that’s exactly what it is. MAKE BANKING SIMPLER. Stay open late once in a while, or, at the very least, don’t close the same time I leave work. Don’t charge me for using an ATM. After all, you never used to charge me for using a teller. Send me statements I can understand without an MBA in finance. Don’t take up my time keeping me on hold and forcing me to
listen to one of your commercials, either. Stuff like that.

Oh, and one more thing: Don’t just tell me you can make my life simpler. Prove it.
That’s it. Thanks for listening.

When I finished, you could hear a pin drop. Eyes darted about. I thought someone might want to throw furniture at me or toss me out of the room. After a long pause, the president said, “Yeah, I hear stuff like that all the time.” And that provided permission for everyone else to chime in with comments like, “I’ve been there myself,” and “That’s exactly how I feel about my electric company.” Everyone was adding their own experiences to the story, building layers and enriching it with meaning. Suddenly the creative brief—that cold, heartless, analytical document—had gained a pulse.

“Where did you get this idea?” the client asked.

“From you,” I fibbed. (Because, honestly, I didn’t know where I got the idea. It was simply born out of my own frustration that the creative brief wasn’t getting me where I needed to go.) “Isn’t this what all the research said?”

“Well, yes, but it’s not quite the same,” came the response.

“That’s precisely my point. We know what the facts are. But from the brief I wrote, the one you said was on target, did you get the same feeling?”

“Well, no, of course not, but . . .”

I kept going. “Imagine a customer walking into this room. Do you think that customer would quickly summarize how they think and feel about banking in one or two sentences? You’d hear some emotion and words we’d never put on a chart or graph. In order to connect with these people, we not only have to know what they think and feel, but we also have to somehow experience what they’re experiencing. We have to be able to empathize with their reality.”

“Well, this is all an interesting exercise, Jim,” the president said, “but what are you going to do with this? Is it actionable?”

“It’s a helluva lot more actionable than this creative brief,” I guessed. (Because, really, I didn’t know for sure until we tried it out. But I had a strong feeling about it.) “Let me take it back to the team. We’ll see you in a week.”

When I got back to the agency, I called a meeting. I took everyone through the same presentation that I had given the client. And the response was immediate. Suddenly the team started connecting to the prospect. They began to deeply understand the banking customers’ challenges and frustrations. Unlike what they normally got from a creative brief, this was information they could process in their gut as well as in their heads.

A week later I saw some of the most engaging creative work I had ever seen for this client.

Our team went in and showed the client how we could talk about Last National Bank in a way that would truly resonate with the kinds of people I had described in the story. The advertising didn’t make empty promises about a unique selling proposition that wasn’t actually unique. It didn’t brag. It wasn’t
flowery. It didn’t try too hard. Rather, it was advertising that demonstrated that this bank understood “busy.” And it proved it knew the importance of simplicity.

We presented this theme: Simplify.

That was it. In one word, we captured the essence of what this bank was all about. It described the bank’s cause. We didn’t come right out and say that Last National Bank made things simple. We relied instead on inference and association with the value of simplification. This, we told our client, would become LNB’s rallying cry—not just for customers who shared that value but for employees who needed to supply the proof. It’s your story, we said. It’s what you’re all about. And it just so happens to be a story that your prospect wants and needs to hear—especially now, in these trying times.

The campaign was met with applause, which, for this client, was a first.

I knew we were on to something with this new “story” approach. Instinctively, it made sense. But exactly why and how it worked was something I couldn’t yet articulate. I needed to know more to really apply it—before we could completely abandon the creative briefing process and make this a regular part of what we did. I knew there would be a ton of questions that I would have to answer.

What I found was something far more powerful than a new way to write a creative brief. A new approach to creative brief writing was merely one component of something much bigger. Digging deeper, I found a whole planning method that had just been waiting to be discovered since my earliest days in the business. I can’t lay claim to inventing this process. It’s been around for a very, very long time. It’s one we use every day in the way we think, explain, or try to persuade others. Studies have now shown that this process is part of our hardwiring. It’s a process that has its roots in story structure. And so, we’ll call this process Story-Branding.

**Overview of the StoryBranding Process**

- Storytelling and other right-brain skills are becoming more important as technology takes over many of our left-brain skills.
- StoryBranding is not about how to convert advertising into stories. Rather, StoryBranding uses the way stories are and have always been constructed and applies it to the brand communications process.
- StoryBranding provides a new (but old) way to organize and simplify our thinking and to gain a better perspective on what we are really trying to accomplish across all stages of a brand’s life cycle.
- Like story structure, a brand can be seen as dealing with obstacles to achieve a relationship with its prospect.
- The StoryBranding model consists of two character cells separated by an obstacle.
- The cells are composed of outer layers or behaviors we can see, and inner layers or values and beliefs that aren’t readily discernible but explain the outer-layer behaviors.
- To connect or attach the cells to each other, we must remove the obstacles. And then, we must make certain that each cell’s chemistry matches the chemistry of the other.
- Matching occurs when there is a logical consistency between the outer layers and the inner layers of both cells.