UNCOVER YOUR ORGANIZATIONAL BRAND STORY AND ENGAGE AND ALIGN OTHERS AROUND IT

BB&CO STRATEGIC STORYTELLING PROCESS & SERVICES OVERVIEW
“STORYTELLING CAN REMOVE THE FRICTION FROM A COMPLEX SYSTEM AND CREATE THE KIND OF RIPPLES THAT MAKE BIG WAVES.”
AT THEIR CORE, ORGANIZATIONS ARE HUMAN; AND HUMANS TELL STORIES. WHEN ORGANIZATIONS USE STORYTELLING STRATEGICALLY, THEY TAP INTO THEIR HUMAN NATURE AND, IN DOING SO, BRING MORE MEANING, FOCUS AND PRODUCTIVITY NOT ONLY TO THEIR WORK, BUT ALSO TO THEIR WORKFORCE.
STRATEGICALLY LEVERAGING THE TIMELESS POWER OF STORY

Since man first gestured to each other in front of a fire, storytelling has been the way we most naturally interact with each other as social, communicative human beings. Ages before there was Twitter, PowerPoint, podcasts, websites, Facebook, emails, newspapers or even books, there was story, used by societies and civilizations to transmit wisdom, develop cultures and instill values in people. From Steve Jobs to Martin Luther King, leaders have always used storytelling to connect people to ideas, to each other and to a vision of the future they want to make real.

For over eight years, we have been strategically bringing the power of storytelling to businesses and organizations, helping clients such as GE, Coca-Cola, TELUS, Hilton, Relais & Châteaux, KPMG, BCAA and UBC recognize the magic that powers the logic of their enterprise. Strategic Storytelling, as we practice it, is communication that runs deeper than mere information. It taps spirit, emotion and imagination to connect one person to another in a way that means something to both. Strategic Storytelling provides clarity and understanding and thus enables people to come together effectively for a shared purpose.

It can take the diverse resources and ideas of a thousand people and align them all into a single effort stretching over years to a common goal. Storytelling can remove the friction from a complex system and create the kind of ripples that make big waves. For stories, once well and truly told, are viral. Your employees and customers sees themselves in your story and then join you in its telling.

And so it grows.

“WITHOUT A STORY, THERE IS NO LARGER PICTURE TO MAKE INFORMATION MEANINGFUL. WITHOUT A STORY, WE RETREAT TO JUST THE FACTS. A STORY THAT RESONATES HELPS US TO DEEPLY BELIEVE IN OURSELVES, INDIVIDUALLY AND COLLECTIVELY, AND IN THE VISION FOR THE COLLECTIVE EXPERIENCE.”

HARVARD BUSINESS REVIEW
“WHY YOU NEED A STORY”
THREE STAGES AND THREE BENEFITS OF STRATEGIC STORYTELLING

BB&Co’s Strategic Storytelling process is designed to help our clients first define the one, true and wholly authentic story of their brand or branded initiative and then engage and align key stakeholders around it, not the least of whom are employees. While every Strategic Storytelling engagement is unique to the client and the challenges and opportunities they face, there are some over-arching objectives and/or benefits that are common for all. These are…

**UNCOVER**
Using our **StoryFinding** process to explore and identify what is most meaningful and distinct about your brand or branded initiative, resulting in a Core Brand Story that resonates with internal stakeholders at multiple levels (mental, emotional, philosophical, etc.) and enables them to fully understand what you’re striving to achieve and why.

**EXPRESS**
Bringing your newly articulated Core Brand Story creatively to life through various foundational **StoryTelling** tools, ensuring you are able to share that story effectively with key strategic audiences, pulling them into it in the process.

**BECOME**
Utilizing various **StoryKeeping** workshops and strategic planning tools to help you not only embed your Core Brand Story it into the operations, communications and culture of your organization but also measure the degree to which it has taken hold.
The remainder of this document provides a topline overview of the various services and/or tools associated with each of the key stages of Strategic Storytelling outlined above. This is intended to give potential clients a broad-strokes understanding of what could be involved in a typical BB&Co engagement, the rough timing and range of budgets associated with that engagement and the key deliverables and results that come from it. As you read through this, please keep in mind that a more detailed and customized proposal is always created for clients who want to explore a potential engagement further, tailored to their unique situation, the challenges and opportunities they face and the budget parameters they need to work within.

**TENETS OF THE STRATEGIC STORYTELLING PROCESS**

- We are here to guide you to the answers instead of giving them to you
- We tap into the brainpower and insight of your leadership and your employees
- We believe the best ideas flow down from the top and bubble up from the bottom
- We feel that research is best used to inform a decision, not make it for us
- We measure success to understand the impact, uptake and ROI of our efforts

Please note that, as StoryFinding is always the first stage of a BB&Co engagement, we have provided more detailed information around that initial process, the key activities associated with it and the key deliverables coming out of it. Further information on all the activities, services and products detailed in this document can be provided at any time, and examples can be shared as appropriate and requested.
THE STORYFINDING PROCESS

Central to StoryFinding is the belief that, in order to bring about meaningful change within an organization and the marketplace that organization works in, people within that organization must be able to convincingly and compellingly “tell a story” around what they’re doing and, more importantly, why they’re doing it. StoryFinding uncovers, develops and defines that story to be told so you can use it to align and inspire the extended team, including employees, strategic partners, suppliers (e.g. advertising agencies, designers, etc.) and other stakeholders.

At a fundamental level, StoryFinding is a strategic or brand planning exercise. But what distinguishes it from conventional planning models is the way in which storytelling is used to give meaning, richness and depth to an organization’s Core Brand Story. Importantly, our process is designed to empower our clients to identify the core strategic elements of their brand themselves, versus us doing it for them. We give voice and structure to those elements and guide them through the process. However, our clients ultimately feel a strong sense of ownership for their Core Brand Story because they recognize the essential concepts inherent in it and their role in unearthing them.

KEY DELIVERABLE: STRATEGIC STORYLINE

The primary deliverable of StoryFinding is your Strategic Storyline: a comprehensive, written articulation of your Core Brand Story and all the strategic components, nuances and distinctions that comprise it. When completed, it provides the focus and precision to identify what distinguishes your brand or new brand venture, propels it ideologically forward and shapes the way it engages with and has an impact on target audiences. It intentionally avoids the “corporate speak” that weighs down so much strategic planning work and instead presents the story of your brand or branded initiative in a way that your team can readily relate to it, not only as employees, partners and suppliers, but also as human beings.

"EVEN IF YOU’RE ON THE RIGHT TRACK, YOU’LL GET RUN OVER IF YOU JUST STAND THERE."

WILL ROGERS
KEY INFLECTION POINT: STORYFINDING SESSION

Central to any StoryFinding project is the simple act of bringing key organizational leaders and employees together to think, create and envision together. While StoryFinding creates a compelling strategic story to work towards, it also creates strong unity among your team as you collectively roll up your sleeves to tackle this important work. The key inflection point of the process is a StoryFinding Session that we produce, manage and facilitate on your behalf. While every StoryFinding Session is tailored specifically to the client, there are some established activities that take place before, during and after it, which are outlined below.

**DISCOVERY & BACKGROUNDING**

We ensure we understand all aspects of your business and brand, including the key opportunities ahead, the challenges to address, your consumers and the marketplace you compete in. During this phase we would review any relevant research you have and/or field new research if needed, and we would conduct interviews with key individuals from within your organization and beyond it.

**PRODUCING A BRIEFING DOCUMENT**

To properly prepare people for the StoryFinding Session, we will write and produce a briefing document. Intended to “prime” the participants, this document will go out to the group three to four days before the session.

**PREPARING & FACILITATING THE STORYFINDING SESSION**

In developing the StoryFinding Session, we will work with you to determine the best people to take part in it. People are much more willing to support something if they’ve had a hand in creating it; accordingly, we counsel our clients to be strategically inclusive in recruiting anywhere from 18 to 24 people for this full-day workshop. We also encourage our clients to invite impartial, outside perspective to the session to help them look at their brand or branded initiative from every possible angle. External participants could be trusted suppliers or advisors as well as relevant thought leaders whose expertise and experience would enrich the process and add depth to the Core Story that emerges from it.
A week following your StoryFinding Session, we deliver Emergent Findings, which will be shared with you for feedback and discussion. This provides a checkpoint with you to ensure we are on the same page as your Core Story begins to take shape and direction. For all intents and purposes, this document will capture what we heard and noticed at the StoryFinding Session as well as offering our thoughts and perspective on what we heard and noticed.

As mentioned above, your Strategic Storyline is the key deliverable coming out of the StoryFinding process. When complete, it weaves together the fundamental elements of your Core Story into one cohesive document, serving as a “True North” to guide the implementation of your brand across all areas (e.g., communications, customer experience, product or service development, etc.) and unify all members of your extended team in thought, word and deed.

Once your Storyline is complete, we will facilitate a half-day workshop with your team to determine the most appropriate ways to bring your Core Story to life across your organization and identify the StoryTelling, StoryKeeping and other activities you plan to undertake as a result.

**STORYFINDING BUDGET**

StoryFinding Budget Range..........................................................$37,500 to $40,000

The above budget is a typical range for the StoryFinding process and covers all time needed for the BB&Co team to execute the activities and create the deliverables outlined in this overview. A more specific budget is created for client’s approval once we have a full understanding of the project. The budget assumes a reasonable amount of back-and-forth, feedback and collaboration with the client throughout the process. The budget does not include applicable taxes, nor does it include the costs of travel and accommodations for the BB&Co team (if needed), venue and AV rental and catering for the StoryFinding Session.
“STORIES, ONCE WELL AND TRULY TOLD, ARE VIRAL. YOUR EMPLOYEES AND CUSTOMERS SEE THEMSELVES IN YOUR STORY AND THEN JOIN YOU IN ITS TELLING.”
SHARING YOUR STORY AND PUTTING IT INTO ACTION

It is one thing to uncover and articulate the Core Story of your brand or branded initiative; it is another thing entirely to then share that story with key strategic audiences and meld it into the communications, culture and operations of your organization. The development of foundational StoryTelling tools combined with the deployment of various StoryKeeping activities ensures the investment our clients make in StoryFinding pays off by positively affecting not only how the organization thinks and speaks as a result of its Core Brand Story, but also how it acts.

This is where the proverbial rubber hits the road. And organizations that are not able to put into action the key elements of their Core Brand Story run the risk of that story evolving into nothing more than “corporate rhetoric,” dying not only on paper, but also in the hearts and minds of employees because, at the end of the day, nothing really changed as a result of it.

StoryTelling tools and StoryKeeping activities are designed to help our clients keep their Core Brand Story alive long into the future. Outlined on the following pages are the tools and services most often provided to our clients during these latter two stages of a typical BB&Co engagement. Which tools and services are right for a client is something we uncover in the last phases of StoryFinding, at which time we work with them to develop a customized StoryTelling and StoryKeeping plan that addresses their unique situation and works within the budget parameters.
Once the verbal language of a client’s Core Brand Story is defined, the visual language for it will often need to catch up. Accordingly, an evolution of a client’s graphic identity—or, as might be appropriate, the creation of a new one—is often the first step in StoryTelling. A new or evolved graphic identity can serve as a powerful signal to internal and external audiences that something has changed for the better with your brand, creating excitement and setting expectations for a new era. Beyond that, BB&Co typically develops a suite of foundational, enduring StoryTelling pieces that clients can use in their strategic communications with employees, partners, suppliers, media and other stakeholders. More detailed information on each of these StoryTelling tools and services is outlined below.

**A NEW OR EVOLVED GRAPHIC IDENTITY**

Development of a graphic identity could include any or all of the following:

- A new or evolved logo
- A comprehensive graphic identity (i.e. “look and feel”) built around a new or existing logo, including primary and secondary colour palettes, typography, imagery guidelines, iconography, etc.
- Application of the new graphic identity into key stationery components (business cards, letterhead, envelopes, facsimile, etc.)
- Application of the new graphic identity to the company website, providing layouts and wireframes for key sections
- A comprehensive Graphic Standards primer, to provide enduring guidelines and direction on how to consistently and cohesively apply the new graphic identity across all applications and touch points

Budget Range — $25,000 to $32,500

Typical Timing — Five to six weeks

**ILLUSTRATED STORYLINE**

An Illustrated Storyline brings the verbal language of your Core Brand Story to life by infusing it with beautiful graphics, images and design. When completed, your Illustrated Storyline serves as an enduring print piece that goes well beyond a typical sales brochure. It can also serve as an effective orientation tool for your staff, giving them a printed touchstone that they can refer back to again and again. The budget ranges for an Illustrated Storyline account for design, layout and getting the content ready for printing; however, it does not include the cost
of printing. The range also assumes that our clients already have a robust image library that we can utilize, though we may need to augment with a few licensed images. If no image library exists, a photo shoot (with an additional budget) may be in order.

Budget Range — $17,500 to $25,000
Typical Timing — Three to four weeks for design and layout

Of all the StoryTelling pieces available to clients, perhaps none is more powerful than a Mixed-Media Film. Using a combination of on-camera testimonials, film, images, graphics, music and voice over, a Mixed-Media Film fires on all cylinders to fully engage the hearts and minds of its viewers. A four to five minute Mixed-Media Film plays a pivotal role in staff recruiting, training and orientation efforts, but also in meeting with current and potential partners and suppliers.

Budget Range — $25,000 to $35,000
Typical Timing — Five to six weeks for development and production

An organization’s office space provides an enormous canvas on which its Core Brand Story can come creatively to life, serving as constant reminder to employees who work in the office each day and suppliers, partners and other stakeholders who visit it on a regular basis. From simple signage conveying key story elements to fully interactive displays depicting an entire history of a brand, Environmental Design can take a wide variety of forms and cover a broad range of budgets.

Budget Range — $10,000 to $150,000 (and up)
Typical Timing — TBD, depending on complexity and manufacturing times
From time to time, the leadership of an organization may need to present the newly articulated brand story to various audiences in various circumstances. Accordingly, a standardized Keynote Address may be in order. Typically ranging from 15 to 20 minutes in length, a Keynote Address goes well beyond your standard PowerPoint presentation to do more than inform your audience, but also enlighten and inspire them. We work with you to determine the key messages that should be conveyed and then design and build a presentation to meet those objectives. We also work with you on delivery to make sure you are fully comfortable with the content.

Budget Range — $12,500 to $15,000
Typical Timing — Three weeks

"THERE IS NO GREATER AGONY THAN BEARING AN UNTOLD STORY INSIDE OF YOU."

MAYA ANGELOU
**KEY STORYKEEPING ACTIVITIES**

StoryKeeping ensures the newly articulated Core Story of your brand or branded initiative is connected not only to your operational and tactical plans, but also to the hearts and minds of the people responsible for bringing that story to life day-by-day, especially those on the front line who interact with and serve your customers. More detailed information on specific StoryKeeping activities and tools is outlined below.

**STORYSHARING WORKSHOPS**

StorySharing Workshops are specifically designed to connect your employees to your Core Story. The workshop itself ensures that your staff fully understands your story and the various components within it. More importantly, it enables your staff to link your story to their day-to-day responsibilities, helping them identify ways in which the elements of that story are already coming to life and uncover ideas on how it could better come to life in the future. The result is your staff not only sees your newly articulated brand story, but also sees themselves in it, understanding and becoming committed to their roles in bringing it to life.

Budget Range — $5,500 per workshop of roughly 20 to 40 people  
Typical Timing — Half-day workshops conducted soon after StoryFinding is done

**ONLINE STORYSHARING SESSION**

For organizations of 150 people or more and/or organizations that have a workforce dispersed across a broad geography, StorySharing Workshops are not always a practical option. Accordingly, we provide an Online StorySharing Session, the objectives of which are similar to those of the StorySharing Workshops outlined above; however, they are realized through an engaging, interactive online survey of roughly 20 to 25 minutes that individual employees go through on their own. We write, design and develop the Online StorySharing Session as well as distill the feedback, summarize the results and identify any strategic implications.

Budget Range — $60,000 to $65,000  
Typical Timing — Four to six weeks
Going deeper than the StoryActivation involved in StoryFinding, we provide a facilitated process by which we help our clients (and their various suppliers and agencies) link the ideas inherent in their Core Story to their strategic plans—e.g. marketing communications, operations, product development, customer service experience, human resources, etc. The outcome of this effort is a succinct and concise One Page Focus Plan that will identify timing, milestones and responsibilities and guide your tactical planning and efforts moving forward.

Budget Range — $15,000 to $20,000
Typical Timing — Three to four weeks

Measuring the impact of an organization’s Strategic Storytelling efforts is central to understanding its ROI as well as its long-term success. Ongoing measurement can take many forms across a variety of areas. With most clients, we utilize existing measurement tools, most often tapping into and/or refining annual employee engagement surveys as well as customer service feedback. If clients don’t have existing measurement tools, we will help them create them. Our engagement in this area includes tailoring existing tools to specifically assess the impact of Strategic Storytelling efforts, analyzing the results and determining strategic implications.

Budget Range — $7,500 to $10,000 (for use of existing measurement tools)
Typical Timing — Annually or bi-annually

While the responsibility of bringing a newly articulated Core Story to life is everyone’s, the executives and managers of your organization still play a pivotal role in driving this story forward. Accordingly, many clients choose to take their senior management team through our Leadership Through Storytelling training. We do this training globally for companies such as GE, Coca-Cola, Irvine Company, Verizon Wireless and Relais & Châteaux, helping their leadership learn how to use storytelling strategically to improve the effectiveness of their communications and, therefore, their ability to focus, inspire and lead others towards desired actions.

Budget Range — $6,000 for a half-day workshop; $8,500 for a full-day workshop
Typical Timing — Half-day (four and a half hours) or full day (seven hours)
POTENTIAL STRATEGIC STORYTELLING TIMELINE

Taking into consideration the typical timings outlined above, a potential timeline for a comprehensive Strategic Storytelling engagement might look as follows. More specific timelines are developed together with our clients.

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<th>ACTIVITY</th>
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<td>Finalized Strategic Storyline</td>
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<td>Leadership Through Storytelling Training</td>
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ABOUT BB&CO STRATEGIC STORYTELLING

For over twenty-three years, the BB&Co team has been helping brands—and the people and organizations behind them—work smarter. More specifically, BB&Co works with clients all over the world to help them uncover the unique story of their brand or branded initiative, define a strategic vision for its future and then use both to align, inspire and unlock the human energy that will be needed to make that vision real.

BB&Co is an intentionally small, boutique consultancy comprised of seven highly experienced, senior individuals. It was founded in 2010 by Bill Baker, and he was quickly joined by several individuals with whom he had previously worked at Envisioning + Storytelling. Bill spent the first 10 years of his career working in New York City managing global accounts for large multinational agencies such as Grey and Saatchi & Saatchi. Before starting BB&Co, Bill was part of the Global Planning Group of DDB Worldwide, where he helped redefine and deploy the suite of strategic planning tools used across DDB’s 205 offices, in addition to managing the Vancouver office of this multinational agency. Bill is a regular presence on the public speaking circuit, avid blogger and is also deeply involved with Streetohome, an organization dedicated to ending homelessness in Vancouver.

There is barely a category of industry that the BB&Co team has not worked in, having collaborated with respected clients of all shapes and sizes, including GE, Coca-Cola, Relais & Châteaux, Hilton Worldwide, BCAA, Travel Alberta, KPMG, Pfizer, Cadillac Fairview, TELUS, The Toronto International Film Festival, Tourism Ministry of Spain, the Canadian Centre for Ethics in Sport, the Irvine Company and the University of British Columbia.

“THROUGH OUR STORY, WE NOW HAVE A DEEPER APPRECIATION OF THE PLACE WE HOLD IN THE WORLD AND A RICHER UNDERSTANDING OF WHAT BINDS THIS GROUP OF REMARKABLE CHEFS AND HOTELIERS TOGETHER. IT’S BEEN AN INCREDIBLE JOURNEY THAT HAS GIVEN US ALL A WAY TO CELEBRATE OUR PAST AND WORK TOGETHER TOWARDS OUR FUTURE”

JAUME TÀPIES, PRESIDENT
RELAIS & CHÂTEAUX
“IF YOU WANT TO BUILD A SHIP, DON’T DRUM UP MEN, TELL THEM TO GATHER WOOD AND DIVIDE UP TASKS AMONG THEM. INSTEAD, TEACH THEM TO YEARN FOR THE VAST AND ENDLESS SEA.”
ANTOINE DE SAINT-EXUPÉRY