



Consumer Journey Doing Business in the Post Covid World

While we wait for the meeting to begin, feel free to introduce yourself in the chat box with your name, location and profession

Reminder: Please go to pollev.com/level5 within your mobile or computer web browser to access our interactive surveys throughout today's session.

Question Set:

Please identify the industry in which you work?

What stage of COVID-19 planning is your business at?

What are you hoping to get out of this conversation?

Special Thank You's



**Brand
Construction**



Larry Gordon

Anthony Leo

Melissa Wells



Consumer Journey

Understanding your Customer in the New Normal World

5/20/2020

Welcome from your moderators today...



Claude Ricks
Managing Partner

Areas of Expertise

- Donor Experience
- Digitally Informed Enterprise Strategy
- Agile Organizational Design
- Strategy Implementation
- Sustainable Transformation
- Executive alignment and facilitation

Education

- Honours Bachelors of Science, Western

Client Experience:



Matt Kelly
Managing Partner

Areas of Expertise:

- Strategic Planning
- Brand Strategy and Strategic Communications
- Strategy Implementation
- Executive Stakeholder Alignment and Facilitation

Education

- HBComm, DeGroote School of Business

Client Experience:



Marylou Hilliard
Director

Areas of Expertise:

- Integrated Brand Strategy
- Client Leadership
- Creative Strategist
- Strategic Implementation
- Project management
- Event Planning

Education

- University of Toronto
- St. Clair College of Applied Arts – Advertising

Client Experience:



Please identify the industry in which you work?

Manufacturing	A
Wholesale Trade	B
Retail Trade	C
Transportation and warehousing	D
Real Estate and rental and leasing	E
Management of companies and enterprises	F
Educational services	G
Health care and social assistance	H
Arts, entertainment and recreation	I
Accommodation and food services	J
Public administration	K
Banking and Wealth Management	L
Insurance	M
Technology	N
Other	O



What stage of COVID-19 planning is your business at?

Phase 1: Still working to understand the right tactical pivots

Phase 2: Some understanding of tactical pivots and partial implementation

Phase 3: Actively working within the new normal have implemented the right tactical changes

Phase 4: Actively implementing our new normal, while beginning to plan our rebound strategy

Phase 5: Aggressively planning and implementing our rebound strategy

When poll is active, respond at **PollEv.com/level5**

Text **LEVEL5** to **(780) 800-5606** once to join

What are you hoping to get out of this conversation?

What we hope you'll get out of this webinar today...

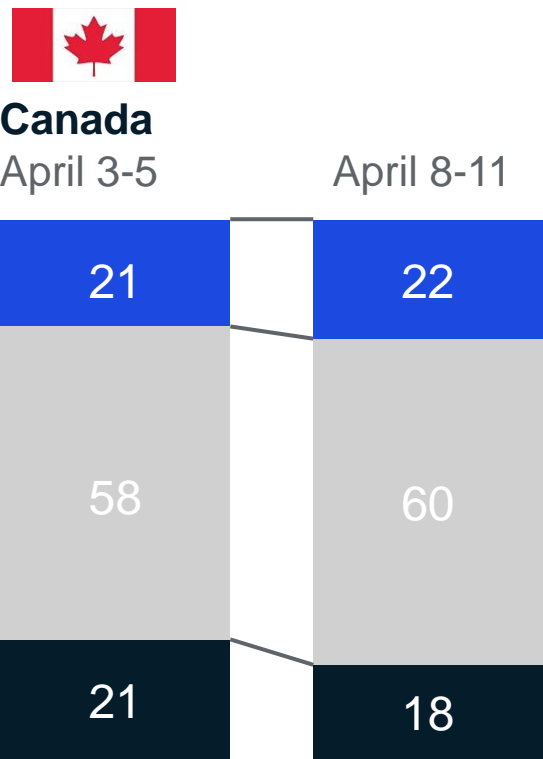
1. How to make sense of the changes in consumer attitudes and expectations that Covid is causing?
2. What is underpinning these customer shifting expectations?
3. How do you react in the near term? What are the implications for your business model, your customer relationships and your brand experience?

Times are a changing...

Almost 80 percent of Canadians remain unsure or pessimistic about Canada’s economic recovery after COVID-19

Confidence in own country’s economic recovery after COVID-19

% of respondents



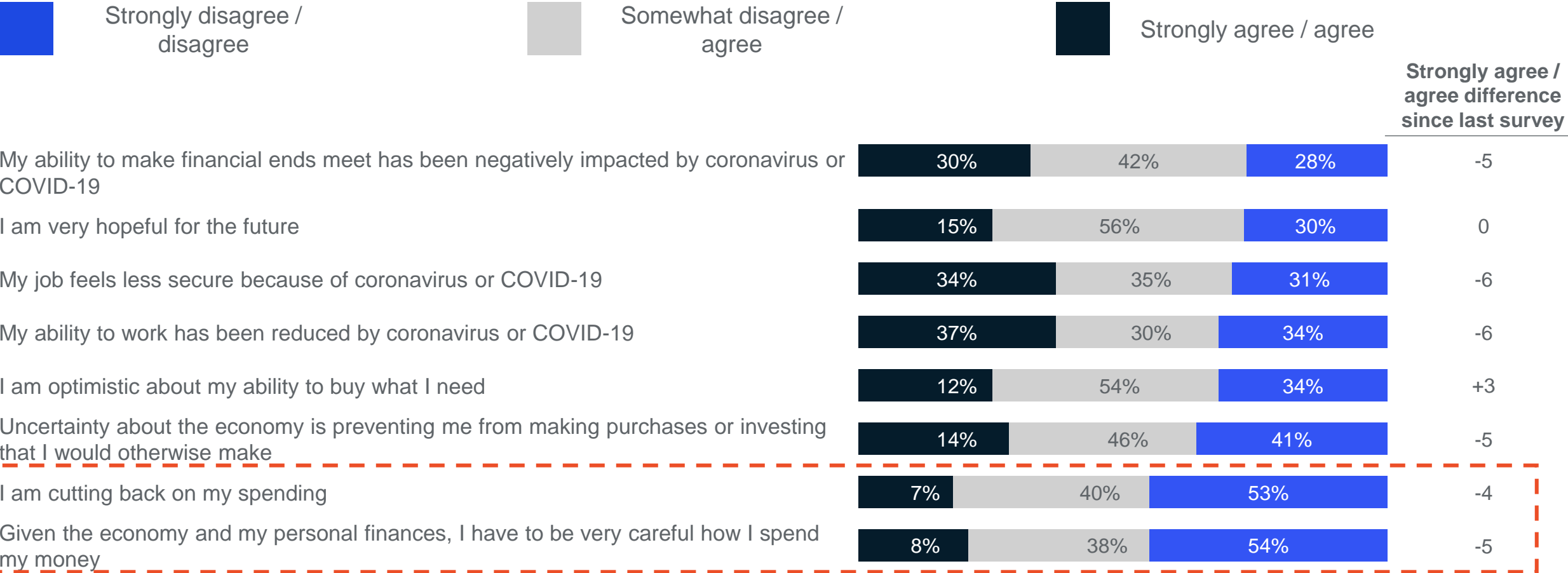
Source: McKinsey Blog April 2020

There should be no surprise that spending habits have changed...

Canadian consumers are feeling strained financially, with more than half of consumers exercising caution with their spending

Overall sentiment in the general population in Canada

% of respondents

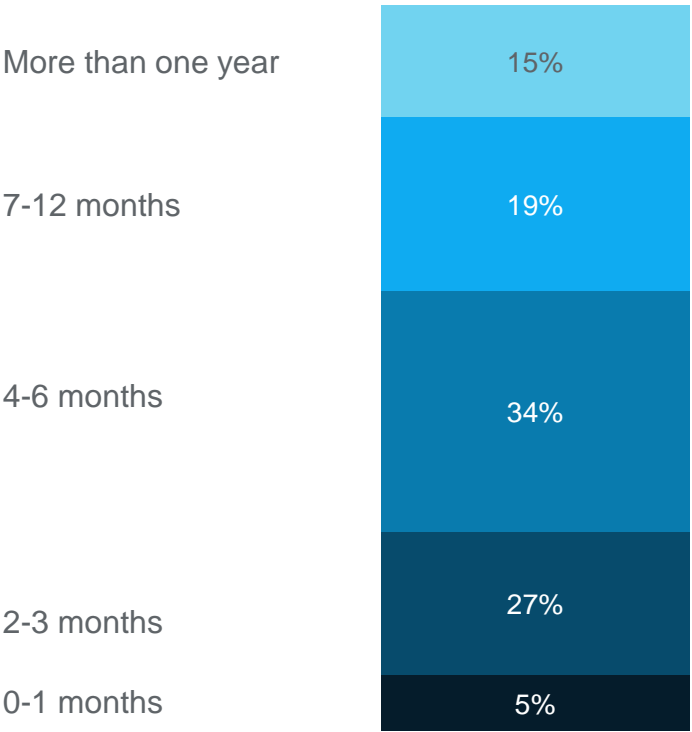


Our social distancing is only one of the longer-term impacts expected...

Most Canadians believe the personal and financial impact of COVID-19 will last longer than two months

Adjustments to routines

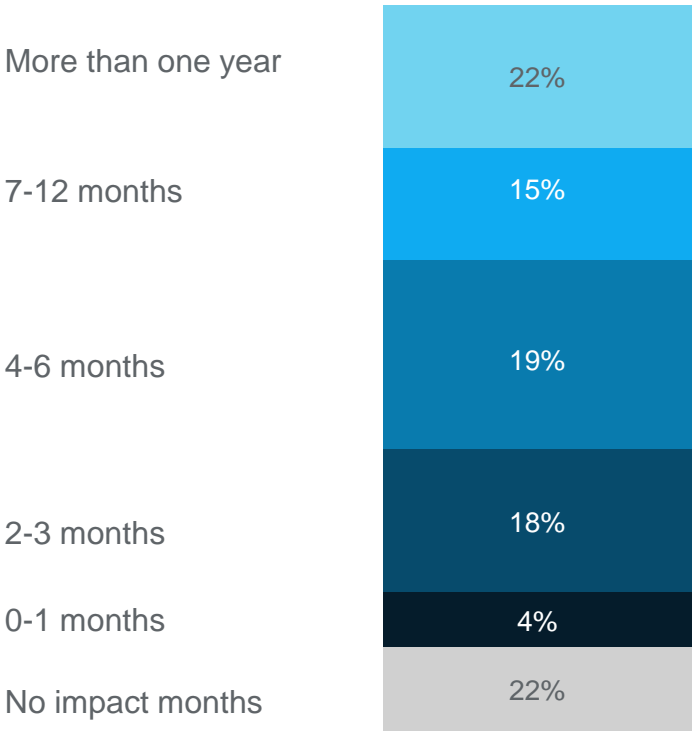
% of respondents



≈95%
Believe it will take **2+ months** before routines can return to normal, the same as the last pulse survey

Impact to personal / household finances

% of respondents

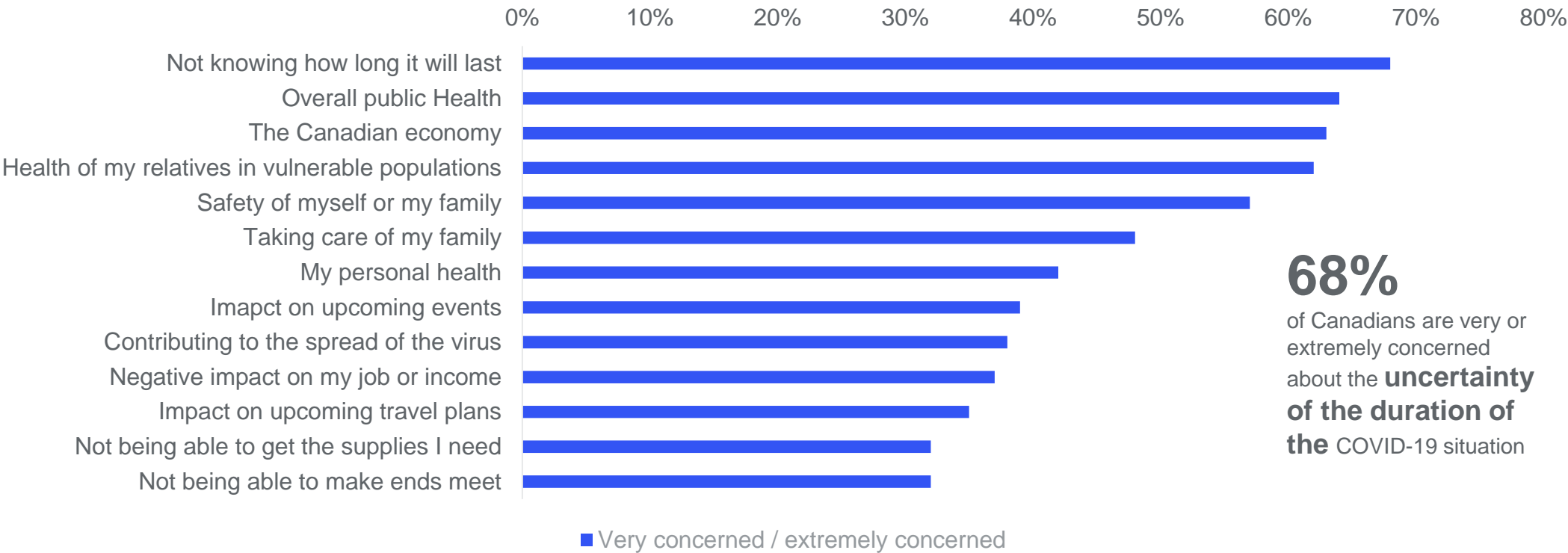


≈74%
Of respondents believe their **finances will be impacted for 2+ months** by the COVID-19 situation, down from 86% in the last pulse survey

If we take a closer look at what Canadians top concerns... there is a prominent theme emerging...

Largest concerns of Canada's population related to COVID-19

% of respondents who are very concerned or extremely concerned

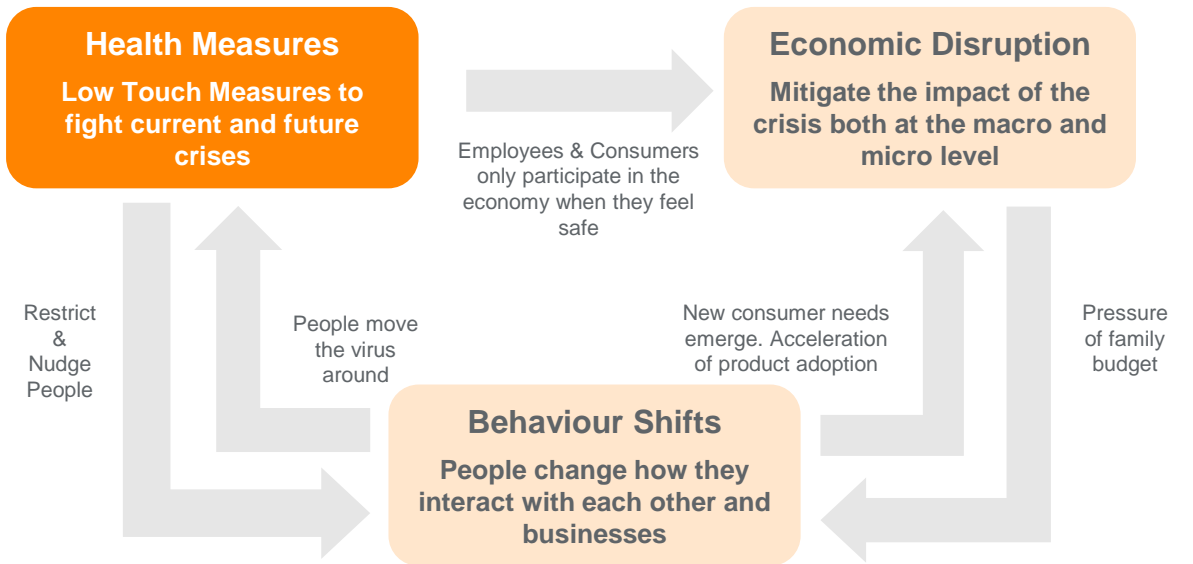
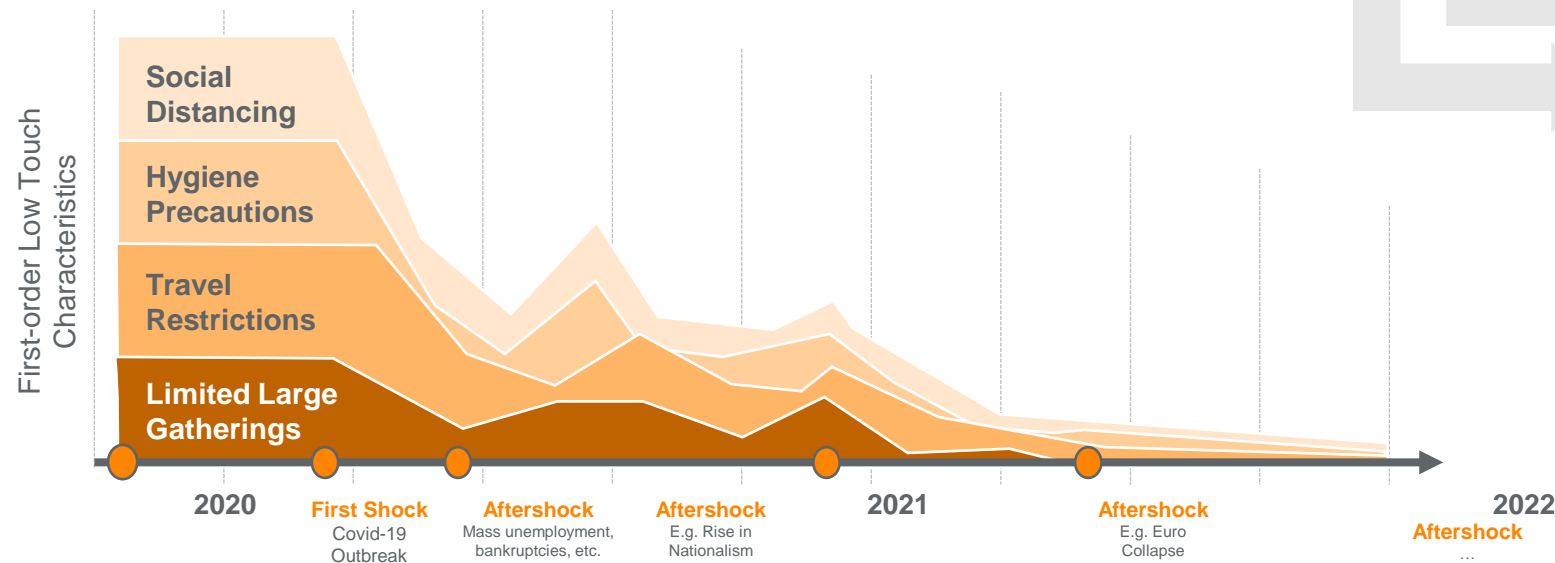


Many of these concerns are not related to the macro economy – but how I feel

Most interesting is behavior shifts that occur more than 21x become habits...

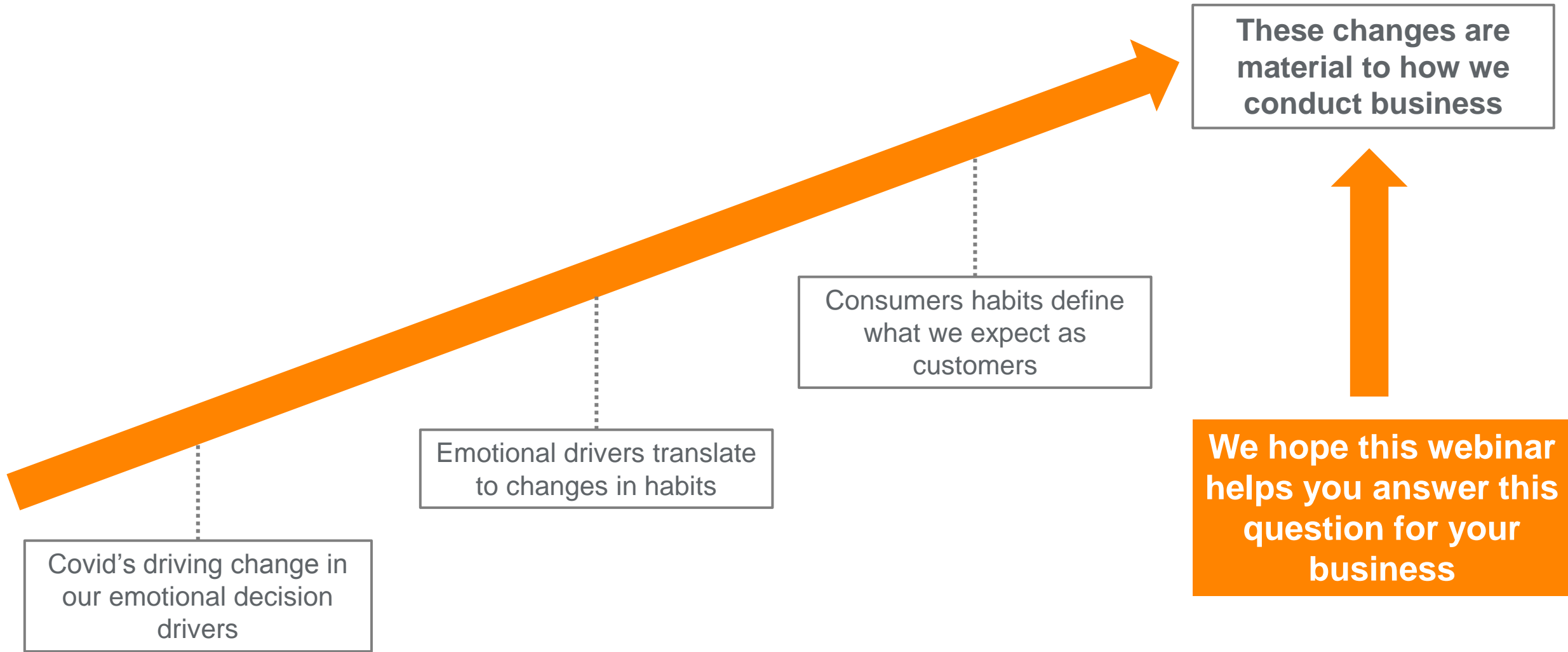
Basic Feedback Loop of the Low Touch Economy

- The longer the health measures sustain, the longer the economic disruption, emphasized by change in human behaviour
- On average, if people repeat a certain behaviour 21 times they would sustain it as a habit afterwards.
- This is why it will be so disrupting to buying behaviours and consumer behaviours.



Habits that are linked with emotional drivers are very sticky and driver customer decision making. These habits will be long lasting.

Key Learnings... aka why are emotional changes important....



The Power of Emotions

Understanding why people do what they do

Traditional market research asks consumers a question and takes their answers at face value, for example:

Question: Why did you pick the smartphone you purchased?



Consumers Say:

- Operating System
- Applications (apps)
- Screen Size and Resolution
- Phone Weight/ Size
- Camera Quality
- Battery Life
- Key Pad

90% of responses to open-ended questions are rational

LEVEL5's BrandMap™ provides unique *emotional* insight

Problem:

1. Consumers can rarely articulate *why* they do what they do
2. People are not consciously aware of the fundamental drivers of their behaviour

Real Purchase Drivers:



Emotional & Self-Expressive

- I Wanted to Fit in at Work
- Makes Me Feel Tech-Savvy
- Communicates that I'm Creative
- Makes Me Feel Different and Unique
- All of My Friends Have the Same Phone
- Makes Me Feel Cool and Trendy
- Communicates that I am a Forward-thinker

Failing to understand or quantify the role of emotion in decision making misses half the story

Why is it important to measure emotions?

Emotions play such an important role in the decision-making process because:

**Emotion is
the glue
of memory**



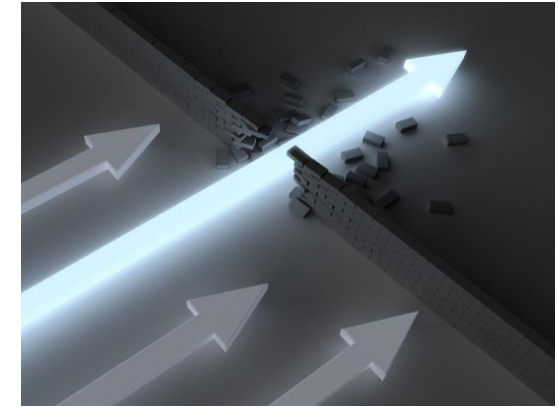
Top of Mind/
Consideration

**Emotions, the
filing system for
our memory**



Go-to Brand

**They create the
impulse to act**



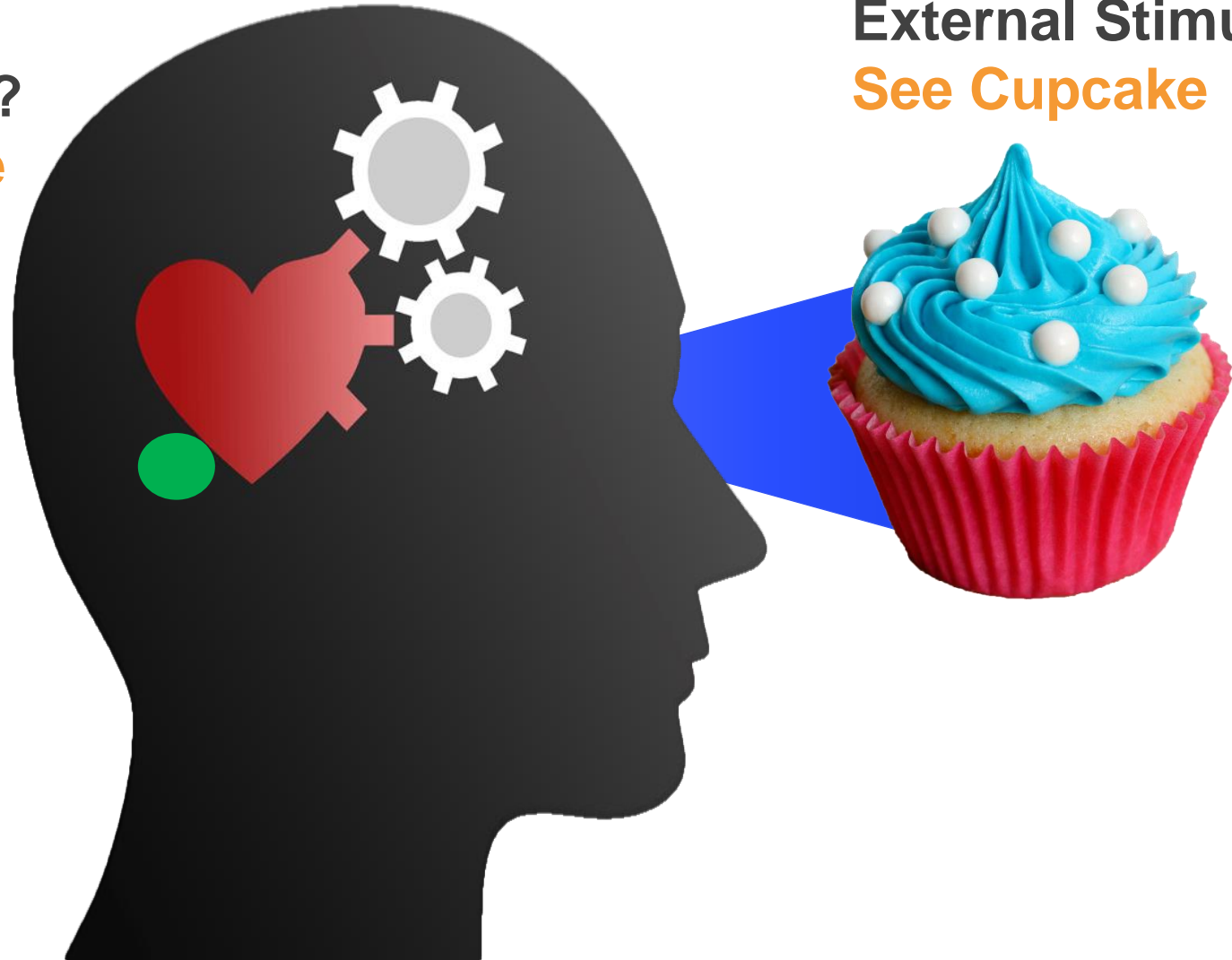
Purchase,
Loyalty &
Advocacy

What is happening is a well understood principle – Humans make decisions with both our rational and emotional needs

3. Rational Mind Kicks In: Approval or Veto?
No, you need to lose weight

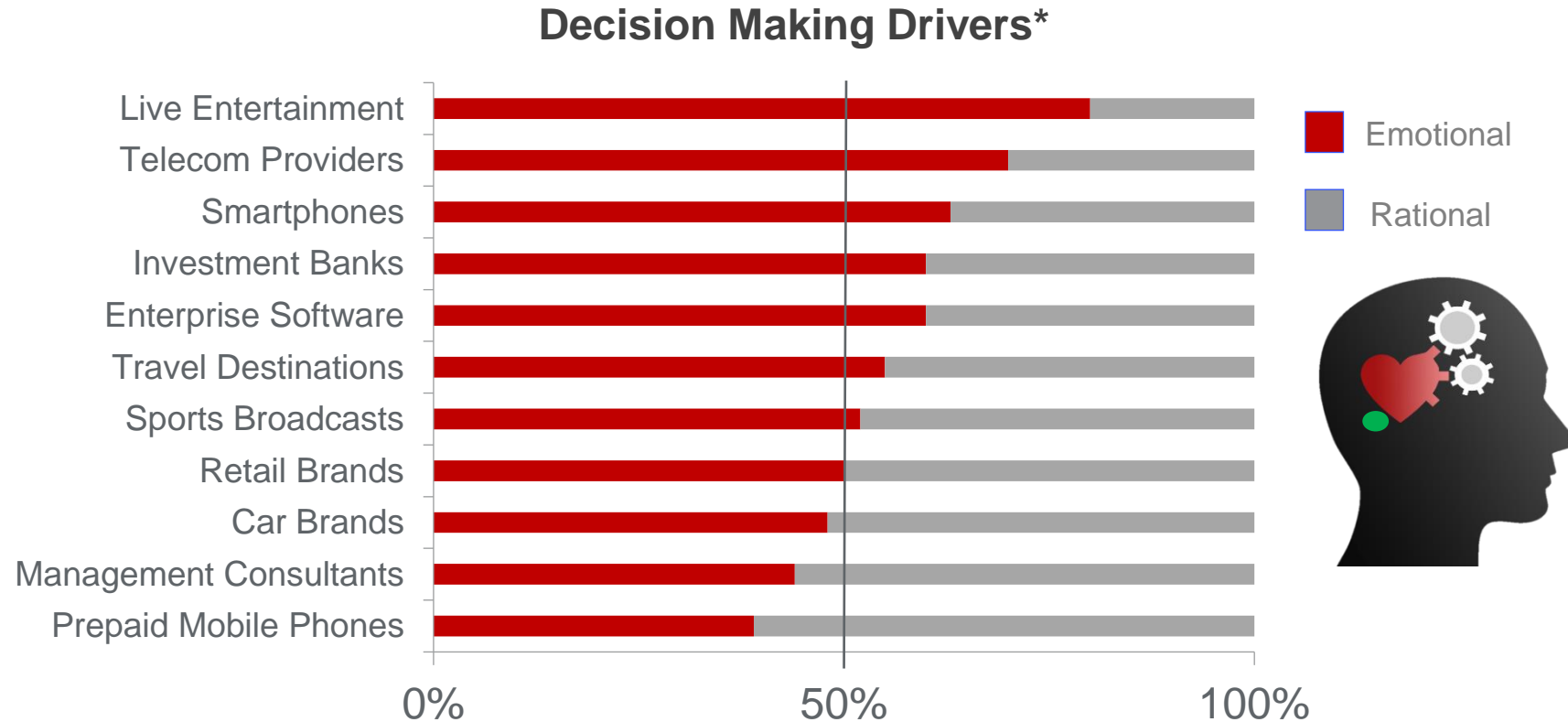
2. Emotional Reaction (Impulse to Act)
“I Want”

1. Animal Reaction to External Stimuli
See Cupcake



Rational decision drivers fulfil our “gets”

Emotional decision drivers fulfil our “feels”



Covid-19 is changing behaviors and emotional expectations

Resetting your customer experience engagement without understanding emotions misses half their story

Understanding the emotional spectrum of consumer feeling in cars



Images: What does the *ideal* brand look like?



Rational: What do consumers get from the brand?



Values: What is important to consumers?



Personality: What type of person would the brand be?



Emotions: How does the brand make consumers feel?

“Sleek, Flowing and Fast”

“Speed & Handling”

To Show “I’ve Made It”

“Confident, Aggressive, Extrovert”

“Joy”

“Solid, Sturdy, Square and Square”

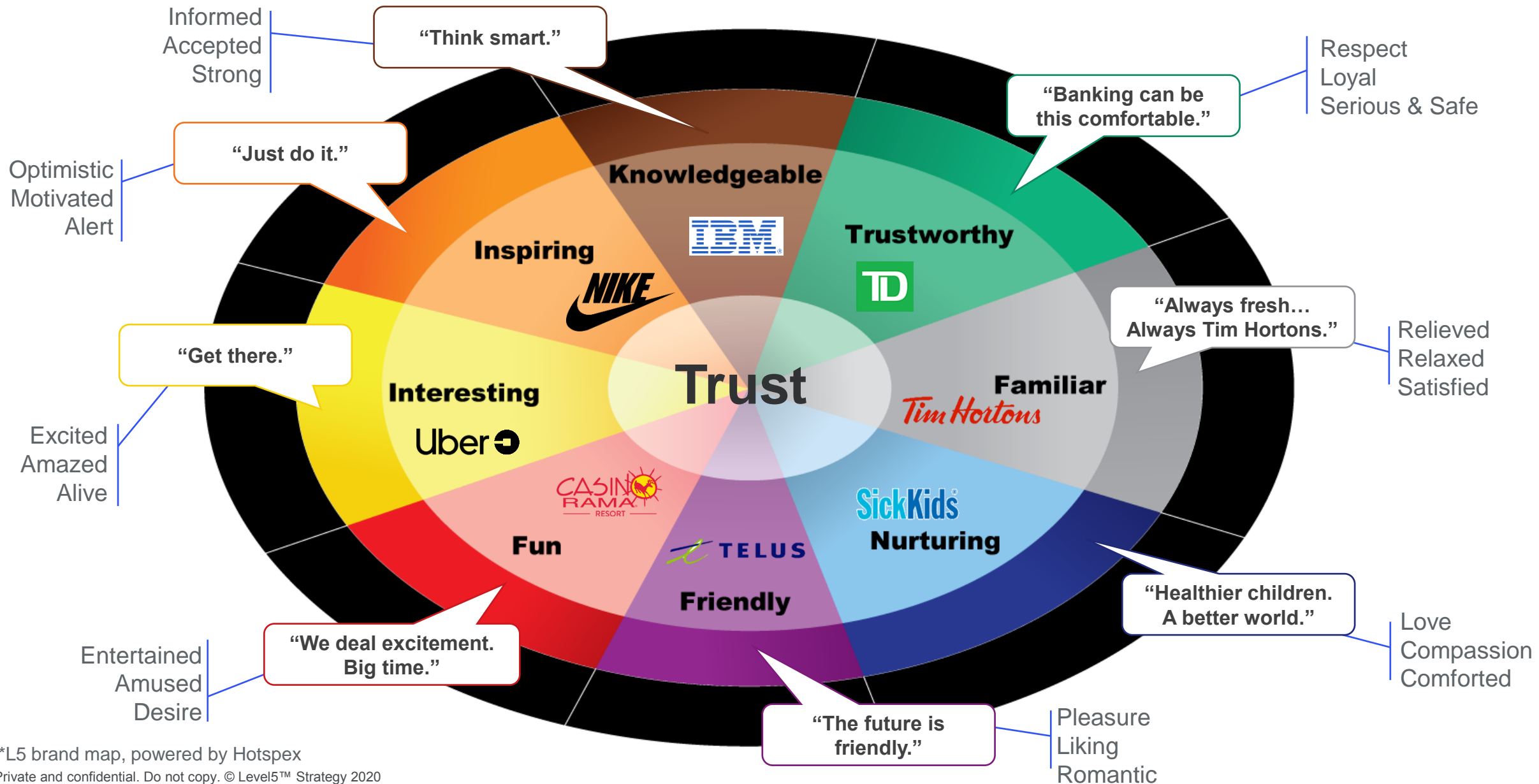
“Anti-lock Brakes”

“To Be An Excellent Parent”

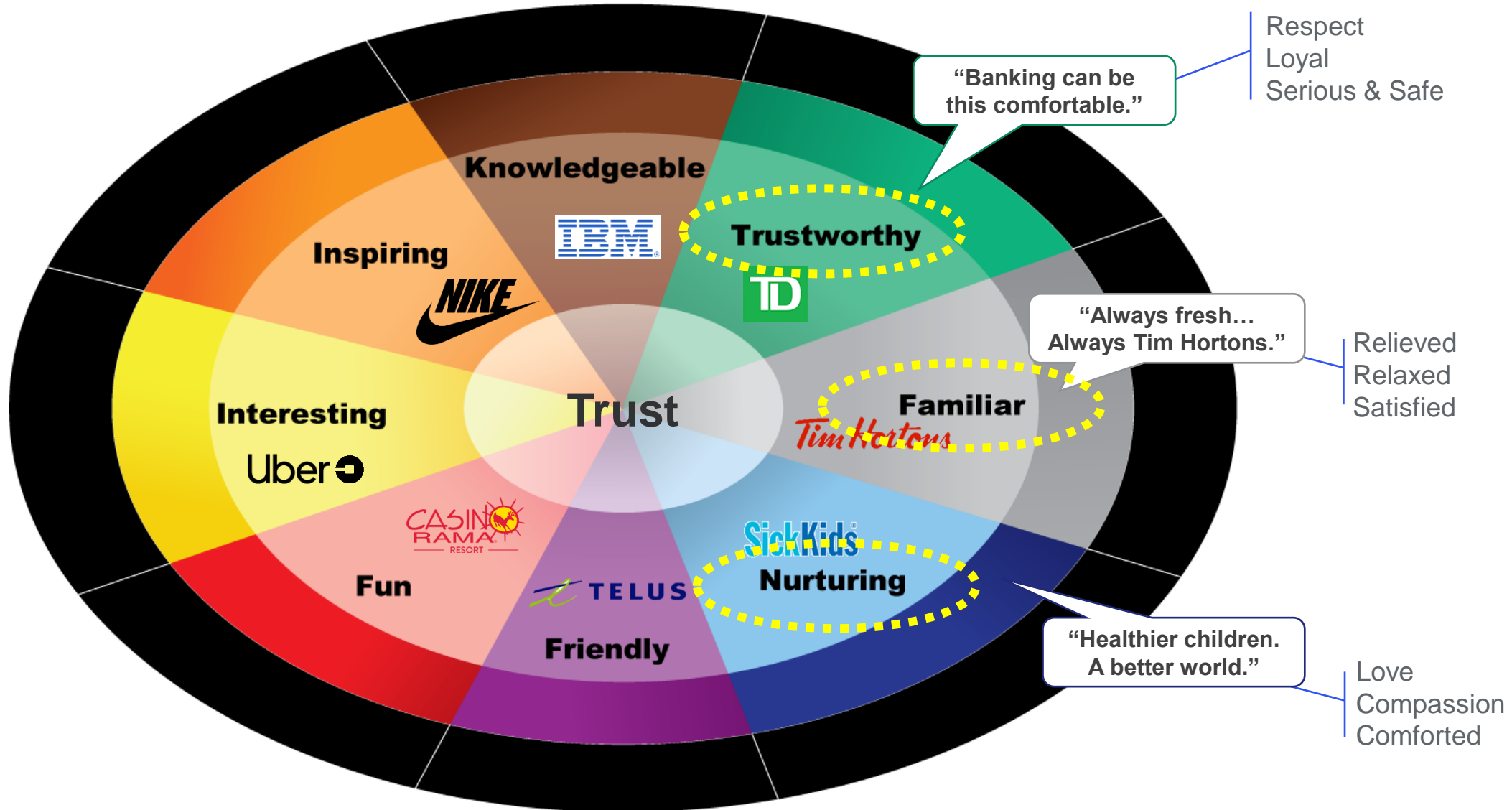
“Reliable, Trustworthy”

“Trust”

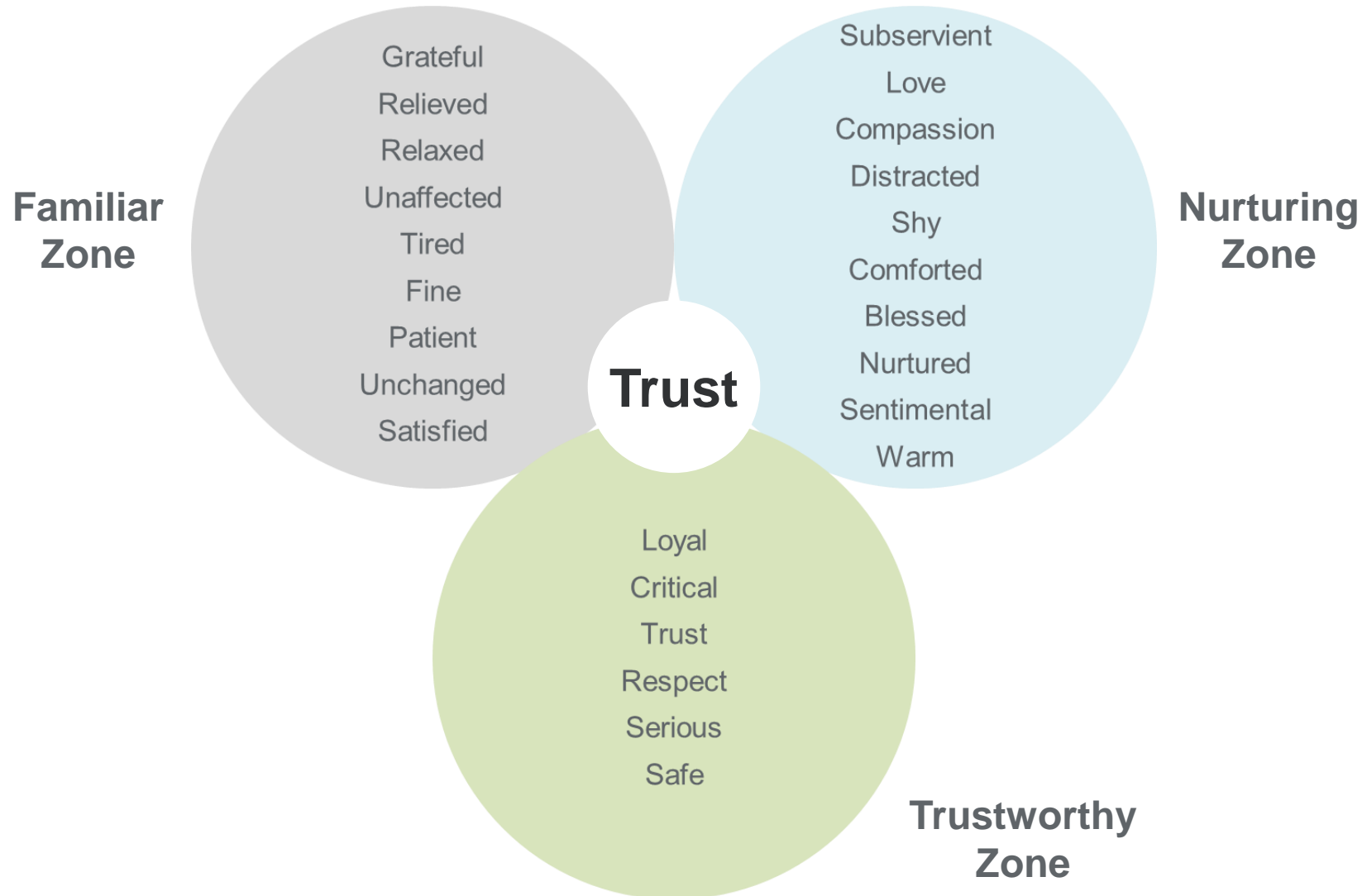
There is a framework that can help make sense of the shift in emotional drivers, we call it BrandMap™ *



The first step in your strategy is understanding the existence of the “Covid Flight Zone”



46% of the total (54) positive emotions sit in the Covid Flight Zone
Knowing how your business delivers on these might be helpful to you



Key Learning Page

- It's critical to understand the most powerful (new) emotions that your customers are feeling
- The most powerful emotion currently is based on a relationship of trust
- It's not so much about fundamentally repositioning your brand or reputation with customers; its about dialing up important attributes such as trust, safety, reliability, and a connection
- It's about being RELEVANT

What does all this mean?

**How can I harness
emotional insights to
how I do business?**

This is all so very interesting... but what do we do with this information



Emotional Drivers

Emotional benefits (“I feel _____”) that drive purchase behaviour or overall experience within a journey stage

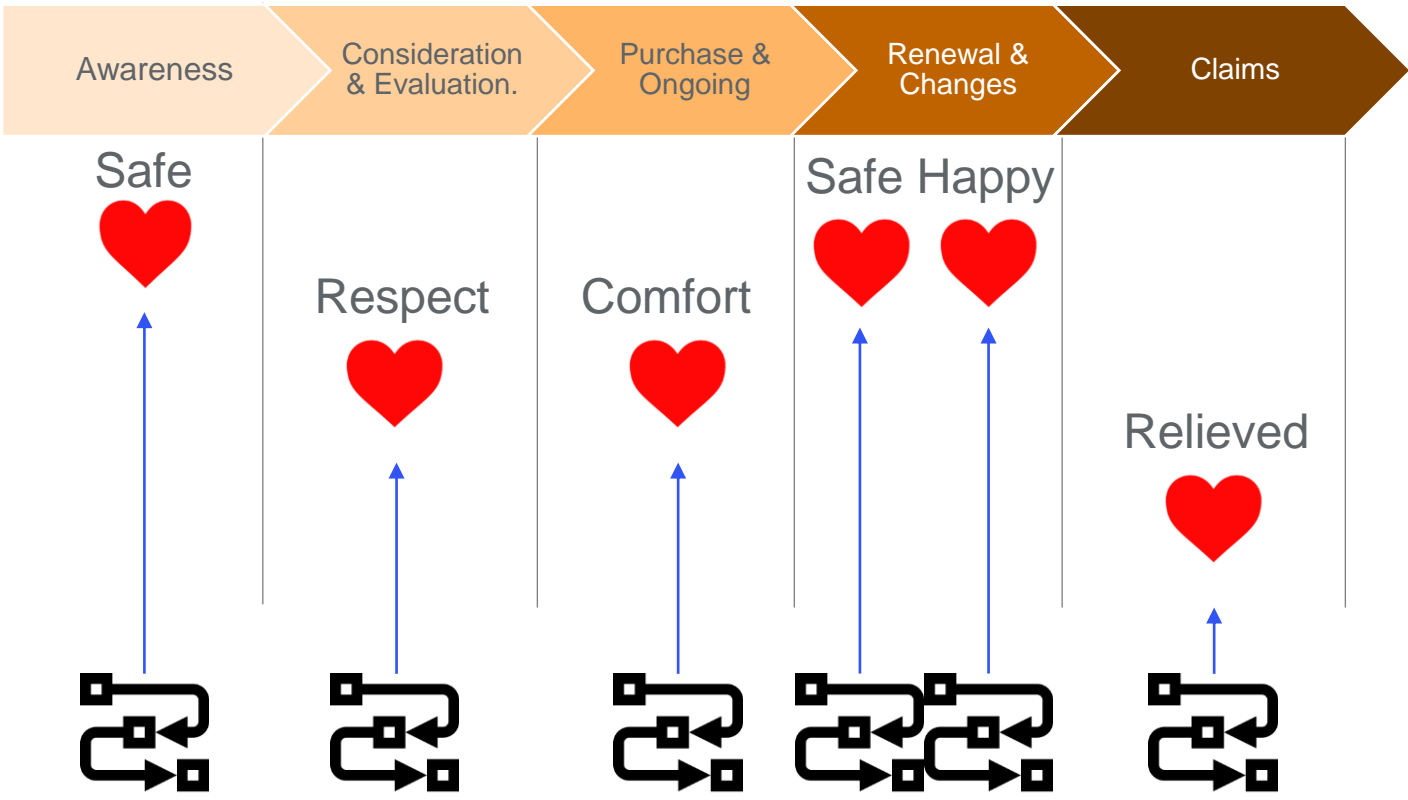
- Pre-Covid
 - What EMOTIONAL expectations did you provide your customers?
 - Where in your transaction with customers did you provide these emotional drivers?
- Now / Post-Covid
 - What NEW or DIALED UP emotional drivers do you think your customers need?
 - Where in your transaction with customers should these new emotional drivers occur?

Here is a simple graphic to illustrate what we mean...

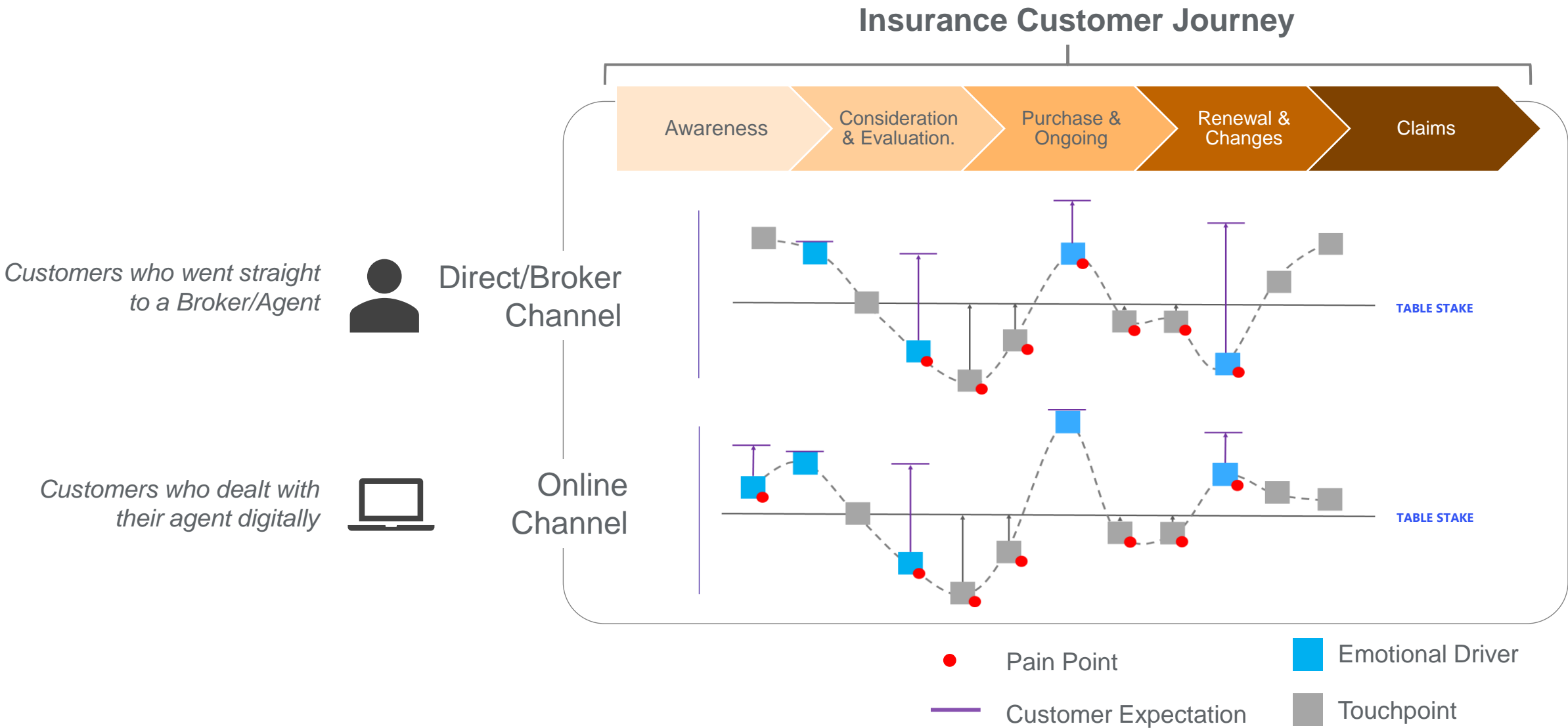
What are your customer's new emotional needs ❤️ ?

Where are these ❤️ satisfied?

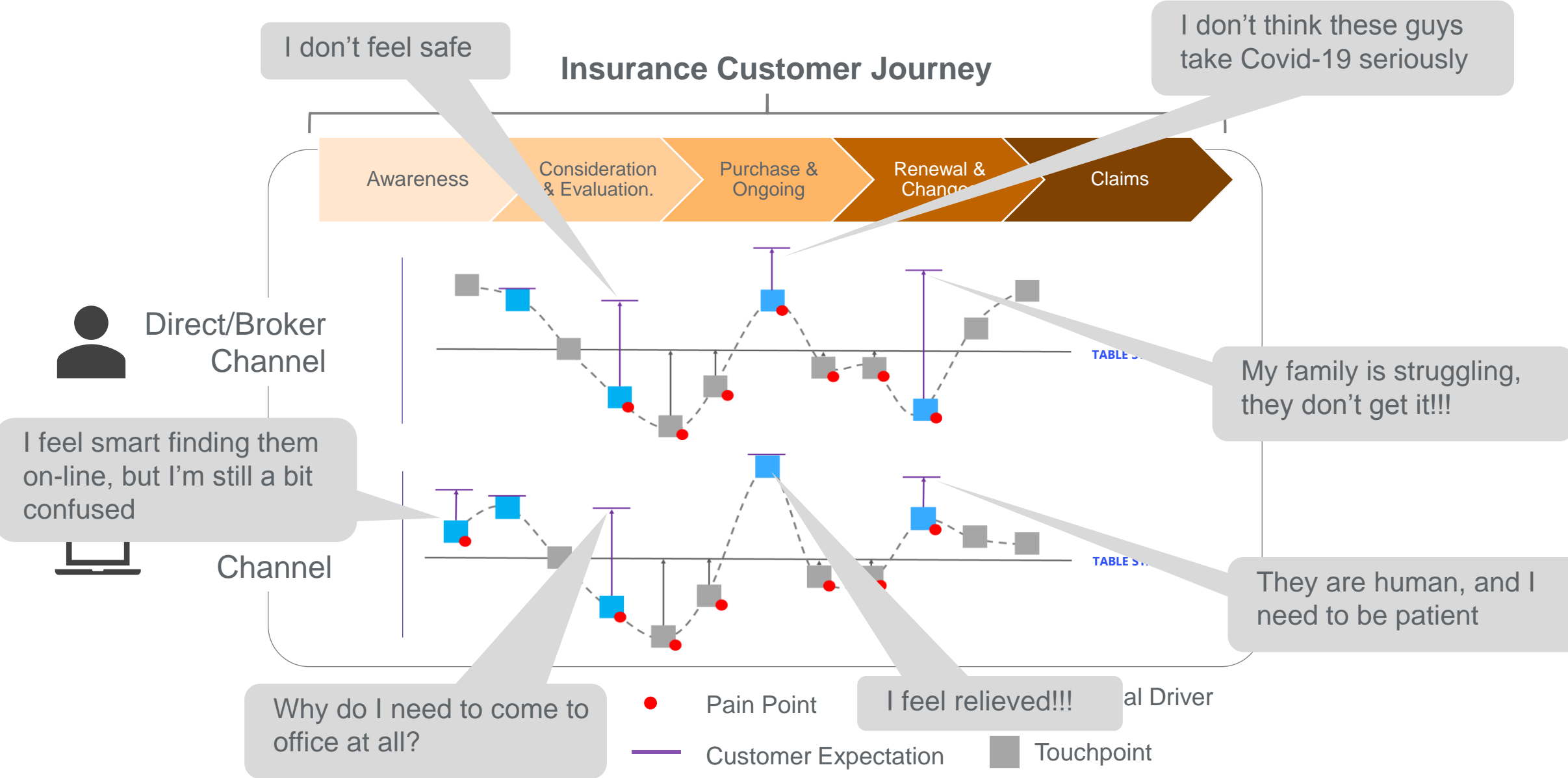
What do you do (process-wise) to deliver these ❤️ ?



As an example, an insurance customer experience post covid in both digital and storefront channels



What are the emotional conversations clients are having with themselves



The ABC's of mapping your customer's emotional expectations and where in their experience with you they should occur

This is the before chart – you have this playbook in your inbox

			This framework is for Illustration Only				A hypothetical Insurance Agency with Storefront & Digital Channels					
	Pre Covid	Now & Post Covid	Awareness		Conversion		Purchase / Usage		Claims Process / Issue Resolution		Community	
	Where & How	Where & How	"I didn't know you existed"		"I want to do busienss with you"		"I use your prodc/svc"		"I have an issue / problem to resolve"		"I feel loyal & part of a family"	
Trustworthy												
	Loyal	Loyal										
	Critical	Critical										
	Trust	Trust										
	Respect	Respect										
	Serious	Serious										
	Safe	Safe										

This is the after chart, what it looks like when you have completed the exercise

			This framework is for Illustration Only				A hypothetical Insurance Agency with Storefront & Digital Channels					
	Pre Covid	Now & Post Covid	Awareness		Conversion		Purchase / Usage		Claims Process / Issue Resolution		Community	
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Trustworthy												
	Loyal	Loyal					Where & How				Where & How	Where & How
	Critical	Critical				Where & How		Where & How	Where & How	Where & How		
	Trust	Trust		Where & How	Where & How		Where & How	Where & How		Where & How		Where & How
	Respect	Respect	Where & How		Where & How			Where & How		Where & How	Where & How	
	Serious	Serious		Where & How				Where & How		Where & How		
	Safe	Safe		Where & How		Where & How		Where & How	Where & How	Where & How		Where & How

How to use this playbook, 4 steps for the pre covid (grey boxes)

- Discuss / agree on the 5 major stages of your business (top chevrons in example, awareness, conversion, usage, issue resolution, community)
- Pick one of the zones, easiest to start with Trustworthy, there are 6 emotional drivers in trustworthy
 - Pre covid try to think through your customer experience, what stage did they expect to feel each or any of the 6
 - Use the grey shaded box (where and how) to capture those pre covid expectations in the correct stage
 - For each grey box you place on your chart be prepared to describe exactly what you do to deliver that emotional expectation

Easy to follow web site

Long standing reputation in community

Continue to build relationships

Treat claims with seriousness

Stick with me through tough times

Let customer take their time to make decisions

Consistent and no surprises!

All contractors treat my family with safe practices

Continue to provide benefits for long standing customers

This framework for Illustration Only												A hypothetical Insurance Agency with Storefront & Digital Channels											
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Where & How		Where & How		"I didn't know you existed"				"I want to do business with you"				"I use your prod/svc"				"I have an issue / problem to resolve"				"I feel loyal & part of a family"			
Trustworthy																							
Loyal		Loyal										Where & How								Where & How			
Critical		Critical														Where & How							
Trust		Trust						Where & How				Where & How											
Respect		Respect		Where & How				Where & How												Where & How			
Serious		Serious																					
Safe		Safe														Where & How							

Now for your new normal use the blue boxes to do the same exercise

- Use the same 5 major stages of your business as you did in pre-covid exercise
- Pick the same zone, try to think through your new customer experience, tough to do? – ask your customer!
 - With their new mindset, e.g. where do they need to feel safe in doing business with you now?
 - Use the blue shaded box (where and how) to capture those post covid safe feelings in the correct stage
 - For each box you place on your chart be prepared to describe exactly what changes you will need to do in order to deliver that emotional expectation

			This framework is for Illustration Only				A hypothetical Insurance Agency with Storefront & Digital Channels					
	Pre Covid	Now & Post Covid	Awareness		Conversion		Purchase / Usage		Claims Process / Issue Resolution		Community	
	Where & How	Where & How	"I didn't know you existed"		"I want to do busiess with you"		"I use your prodc/svc"		"I have an issue / problem to resolve"		"I feel loyal & part of a family"	
Trustworthy												
	Loyal	Loyal					Where & How				Where & How	Where & How
	Critical	Critical				Where & How		Where & How	Where & How	Where & How		
	Trust	Trust		Where & How	Where & How		Where & How	Where & How		Where & How		Where & How
	Respect	Respect	Where & How		Where & How			Where & How		Where & How	Where & How	
	Serious	Serious		Where & How				Where & How		Where & How		
	Safe	Safe		Where & How		Where & How		Where & How	Where & How	Where & How		Where & How

I don't need to speak to anyone in person to learn about your business

I can sign my insurance documents digitally and don't need to come to office

When I did come to the office, you took great care in social distancing

Everyone throughout the claims process, including all contractors respected my family's safety

They did the same safe job for my family who I recommended

When you're done it might look like this...

			This framework is for Illustration Only			A hypothetical Insurance Agency with Storefront & Digital Channels					
	Pre Covid	Now & Post Covid	Awareness	Conversion	Purchase / Usage	Claims Process / Issue Resolution	Community				
	Where & How	Where & How	"I didn't know you existed"	"I want to do busienss with you"	"I use your prodc/svc"	"I have an issue / problem to resolve"	"I feel loyal & part of a family"				
Trustworthy											
	Loyal	Loyal				Where & How				Where & How	Where & How
	Critical	Critical			Where & How		Where & How	Where & How	Where & How		
	Trust	Trust		Where & How	Where & How	Where & How	Where & How		Where & How		Where & How
	Respect	Respect	Where & How		Where & How		Where & How		Where & How	Where & How	
	Serious	Serious		Where & How			Where & How		Where & How		
	Safe	Safe		Where & How	Where & How		Where & How	Where & How	Where & How		Where & How
Familiar											
	Grateful	Grateful			Where & How		Where & How	Where & How		Where & How	Where & How
	Relieved	Relieved		Where & How	Where & How		Where & How		Where & How		
	Relaxed	Relaxed			Where & How		Where & How		Where & How		
	Unaffected	Unaffected			Where & How		Where & How		Where & How		
	Tired	Tired						Where & How			
	Fine	Fine			Where & How		Where & How		Where & How		
	Patient	Patient			Where & How		Where & How		Where & How		
	Unchanged	Unchanged									
	Satisfied	Satisfied		Where & How	Where & How		Where & How		Where & How	Where & How	Where & How
Nurturing											
	Subservient	Subservient				Where & How		Where & How			
	Love	Love									
	Compassion	Compassion									Where & How
	Distracted	Distracted		Where & How	Where & How		Where & How				
	Shy	Shy				Where & How					
	Comforted	Comforted		Where & How	Where & How			Where & How		Where & How	
	Blessed	Blessed			Where & How						
	Nurtured	Nurtured					Where & How		Where & How		
	Sentimental	Sentimental									Where & How
	Warm	Warm							Where & How		

Wrap up and key learnings

1. Behaviors are shifting – New habits are being formed
2. Shift in emotional drivers “dial-up” on trustworthy, familiar, nurturing zones
3. Your customers are carrying expectations of these new ‘over indexed’ emotional expectations as they conduct their business
4. Assessing your business in light of your prospects and customers changing emotional expectations is key to your go forward success
5. Your ability to translate this learning into repeatable ‘processes and things’ you do to deliver these new emotional drivers is key

🖥️ When poll is active, respond at **PolleEv.com/level5**

📱 Text **LEVEL5** to **(780) 800-5606** once to join

Do you have any questions related to what we've shared today?

**For follow up questions, please
contact:**

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mkelly@Level5strategy.com

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Next Webinar is Wednesday May 27 1pm

**POSITIVE FORWARD MOTION IN THE
COVID19 ERA**

**Speaker: Lesley Calvin, Leadership Development
Consultant**

Register - [ageworks.co](https://www.ageworks.co)

Thank You!