

Case Study



Global Business Development

Strategic Foundation
Market Assessment
Positioning
Brand Platform
Audience Segmentation
Pipeline Development
Website & Collateral
Messaging Outreach
Initiatives

The Client:

Canadian Based Educator, Innovator, Strategist & Author

The Challenge:

Global Branding, Marketing & Agent Representation

The Situation

Institute for Social Design (ISD) was initially engaged to develop strategies and implement tactics that would establish the Subject Matter Expert's (SMEs) brand presence in the US market, to optimize the launch of his upcoming business books, and to position him as a leading management thinker. This initiative was needed for two critical reasons. First, SME's U.S. presence as a leading strategy consultant had waned during his eleven year work in Canada. Second, he desired a 'life-after-retirement' transition strategy that would provide him with ongoing speaking, consulting and advisory engagements.

Social Design's Approach

After an immersive discovery session with the SME, ISD recommended a comprehensive program inclusive of branding, marketing and business development strategies and tactics. We began by building the strategic foundation through collateral review, business intel assessments, market analysis and competitive audits. We identified audience segments and developed robust database pipelines. Next, we developed the brand positioning: the essence, personality, tone, manner, palette, tagline and other guiding characteristics. We developed messaging and collateral for each audience segment and we launched outreach initiatives in tandem with the website launch. Due to the success of the programs, ISD was then engaged as exclusive agent representative and brand manager of record to convert the volume of engagement requests that followed into client projects. In these roles, we have gone on to add value as we observe the need, such as developing international pricing strategies, creating client contracts, as well as designing systems, tools and processes that create operational and workflow efficiencies. We have attended a majority of client sessions, and provided coaching and advisory input in order to continuously enhance the client experience.

Results

- Established a powerful global presence for the SME brand
- Secured top ranking among Thinkers50
- Secured high profile clients and engagements such as Microsoft, Deloitte, Diageo, P&G
- Tripled annual engagements and revenues
- Secured large audience engagements
- Leveraged SME's competencies into advisory and workshop assignments
- Helped to secure spots on TV and Radio talks
- Helped to position SME for long term, sustainable success and status as leading global authority
- Focused emphasis on value-add experiences for clients