

BRAND SECRETS AND STRATEGIES PODCAST #154

Hello and thank you for joining us today. This is the Brand Secrets and Strategies Podcast #154

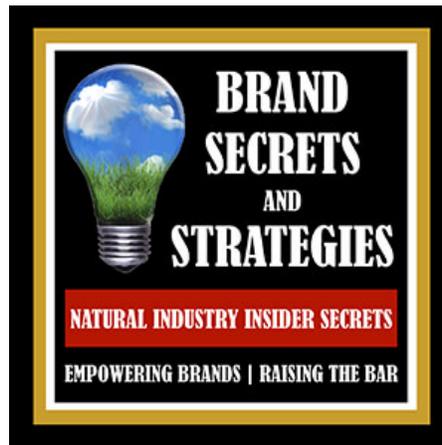
Welcome to the Brand Secrets and Strategies podcast where the focus is on empowering brands and raising the bar.

I'm your host Dan Lohman. This weekly show is dedicated to getting your brand on the shelf and keeping it there.

Get ready to learn actionable insights and strategic solutions to grow your brand and save you valuable time and money.

LETS ROLL UP OUR SLEEVES AND GET STARTED!

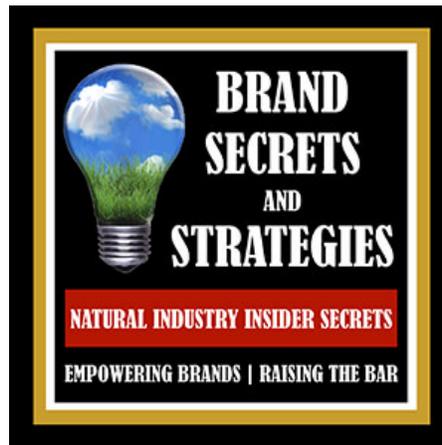
Dan: Welcome. In today's show, we're going to talk about how your brand and your company culture are one and the same. This is a concept I've been talking about a lot. One of the primary focuses of this podcast is to help you sell more or help you leverage the unique value of shopper that buys your brand and we talk a lot about transparency and we talk a lot about how your customer, the customer that you drive into a retail store, is far more valuable than the slotting and the other fees that retailers charge you. This is because that customer aligns with your mission and aligns with your brand. In this podcast episode, we're going to talk a lot about how your culture and your brand are one and the



same. Today's guests are going to talk about a concept that they use called the Fishbowl Effect, where everyone is watching. Talk about ultimate transparency. The reason this matters is because people are paying attention to your brand.

If you want those customers to know, like and trust you, then you've got to be authentic. You've got to be completely transparent. That means that everyone on your team has got to personify what you stand for as a brand and that begins with your culture. As you'll hear today, this is the new ways of branding. In other words, instead of brands telling us who they are or who they want us to believe they are, these are brands where both their mouth and their feet are moving in the same direction. That level of authenticity that customers gravitate to. Think about it this way. If a brand has ingredients in it you don't trust, you're going to stay away from that brand while at the same time, if you're not authentically representing who you are to the customer. Well, customers are going to figure that out. They're going to know.

And as a result, they're going to make choices whether or not to choose your brand or not choose your brand based upon how much they can trust you. How authentic you are. How well you go out of your way to communicate those values, your company culture. Now we're talking about the brand. We're not just talking about the brand itself. We're talking about the branding of everyone within the company, the company culture. Put another way, your brand is a culmination of the leadership decisions that the brand makes, of the people within the brand. Today's episode is going to challenge you to think a little bit differently about your brand. Today's guests believe that a brand has a soul and you're



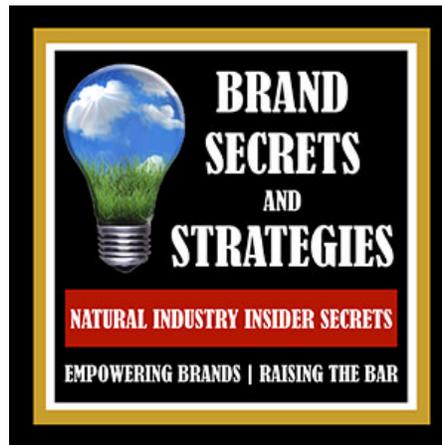
going to learn how to leverage that within your messaging. How you can use it to communicate more clearly to your customers, to build that know, like and trust factor.

Before I go any further, I want to remind you that at the end of every episode, there's a free downloadable guide. I always include one easy to download, quick to digest strategy that you can instantly adopt and make your own. One that you can use to grow sustainable sales and compete more effectively with. Remember, the goal here is to get your product on more store shelves and into the hands of more shoppers, but this podcast is about you and it's for you. If you like the podcast, share with a friend, subscribe and leave a review. Now here are today's podcast guests, Emily, and Justin with Root + River. By the way, they've got a book coming out soon. So you're going to want to connect with them so that you can learn when it comes out so you can be the first to get it. Justin and Emily, thank you for coming on today. Can you please start by telling us a little bit about yourself and how you got to where you're at today. Emily, you want to go first?

Emily: Sure and thank you so much for having us. We're really happy to be here with you. So, where did I come from? That's a deep question to begin.

Dan: It is.

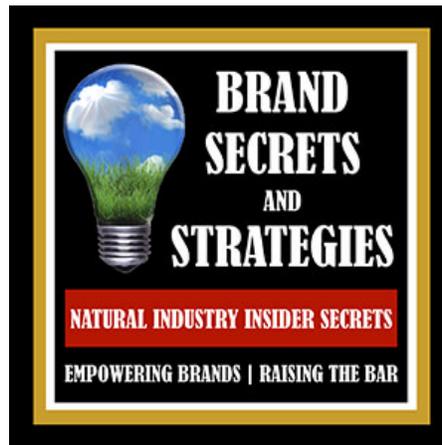
Emily: So I am the Co-Founder of Root and River and we believe every great brand is a spiritual experience. So we help leaders who are really interested in changing the world with the work that they do, uncover their truths and articulate that and then go ahead and use it in everyday conversations, internally first and then



externally. And so that's what we do together. I'll let Justin talk about his background, but my background really begins as a journalist. I was a journalist for eight and a half years. So I was a storyteller essentially and began as a cover reporter, covering education in the Phoenix area and just fell in love with journalism and fell in love with the process of telling people stories, asking stories and asking great questions. That's really just at the heart of who I am. I've always been a writer.

But I fell in love with journalism as a business too and became a publisher and an editor and then a publisher of a group of community weekly newspapers in the Phoenix Metro area and so I'd like to say I use that journalism every day in the work that I do because it's all about really understanding what people's drivers are, asking great questions to help them see what their drivers are and give you pieces of their story, but after I left journalism I went into public relations, marketing, communications, social media for a boutique firm and learned more of the business side of storytelling and then I went out on my own and just thought, "Gosh, I hope my phone rings," and it did based on my prior working connections in the Phoenix area.

So I did a little bit of everything. Social media, marketing, communications, internal and external and a little bit of ghostwriting as well and I eventually ended up going in house for my biggest client, which was TTS Success Insights and they're a human behavioral research company and I was really honored to serve as their VP of Corporate Communication and Marketing and I oversaw all of the digital and the marketing and the communication of a network that had 7000 distributors at the time world wide. So it was a great experience and yet another

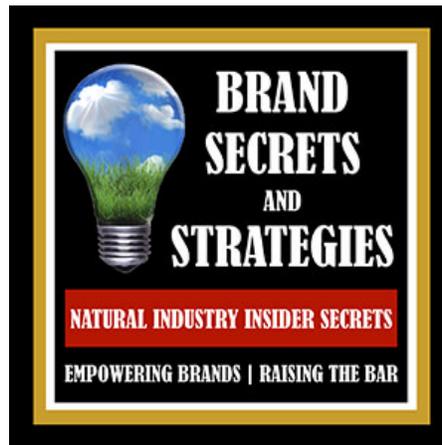


deep dive into people's drivers and motivations and the way they behave and understanding how we could bring all that together. So that's been my journey to here and yeah, you can take it from there.

Justin: So my background is, well if you trace it all the way back, I was raised on a cattle ranch in eastern Oregon. So I grew up a cowboy and that frames a lot of your thinking as it relates to work and entrepreneurship and what not. So most of my career, my early career was in sales, B2B sales primarily. I worked my way up to be VP of Sales for two different software companies, but most of my journey feels a little bit like before Root and River and then after. It's like a very clear line where everything I did before Root and River was the pursuit of something. So I did various things. I've been self-employed since 2003, but that self-employment kind of pivoted to various ways to monetize my knowledge of branding and marketing and sales in this combo kit. And then after Root and River, it went from sort of... Before Root and River I was seeking something and after Root and River after I met Emily and we kind of worked together, kind of almost, not secretly, but not super publicly that we were doing projects together.

It was then that I realized that this is what, I wanted to create something. I wanted to create something that didn't exist before and it's what we call now intrinsic branding or branding or showing the outer world your inner world.

Dan: Love how you put that, so intrinsic branding and I was looking at your website. First of all, let me back up a little bit. Thank you for reaching out to me and thank you for being available today. Your message, your mission align so perfectly with what I do and so to

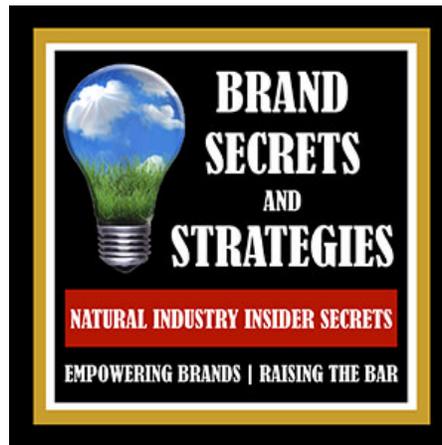


be able to have this conversation, I took a lot of notes before we started and I was watching some of the videos on your YouTube channel, et cetera. So let's break this down a little bit. Emily, you're talking about the humanization of behavioral standards [inaudible 00:07:57] behavioral research and then one of the YouTube episodes, you talk about the humanization of a brand and how it's got to come from within from the person. Can you talk about that a little bit and why that matters?

Emily: Absolutely, I would love to. So we have this funny behavior as human beings that we tend to put up barriers and we put up divisions inside of ourselves and we also apply those divisions into things around us. So we tend to think of brands as entities and not as people, but really a brand is usually one person where an idea begins and then it spreads to other people and they catch that fire and that sense of purpose in this greater endeavor and so brands are human beings. They are the extensions of a human being's efforts. So we spend a third of our life at work and that's a conservative estimate.

We dedicate a third of ourselves, our life, to the work that we're trying to do in the world and so it is a passionate, soulful human endeavor and so the work that we do is really to reorient people to that reality and to strip away that division and that sense of, "Oh this is a thing. It's not a person or a group of people." We want to return people to the idea that there is a soul to every endeavor, to every brand, and to every business.

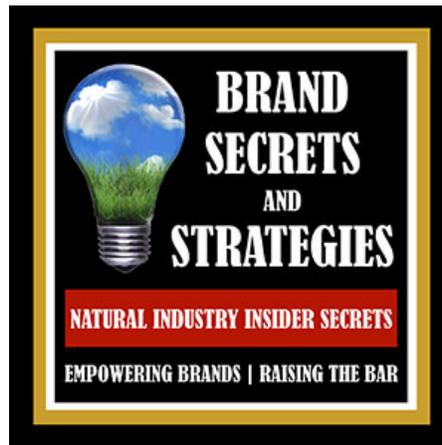
Dan: Perfect, and then Justin, you're talking about the intrinsic branding. Can you talk a little bit about that and how that relates to what Emily was just talking about?



Justin: Yeah, sure. So we kind of divide the era of marketing into two significant eras. The first one is simply what we call the Old World. And in the Old World, it was about the extrinsic brand. You could pay an ad agency or a PR firm and they could make you a brand that was completely detached from reality. So you could make, you could sell and market cigarettes and get doctors to say it was even good for pregnancy with their ads out there that showed that and you could use propaganda and you could build a brand and many brands were built that way successfully. Everything from diamonds are forever, to roses on Valentine's Day to breakfast is the most important meal of the day.

All of those ideas came from ad agencies or PR firms as a type of manipulation of the market as it were. And so in the last 15 years, a New World has emerged which is sort of a forced transparency. It's what we call the Fish Bowl and when you operate in the Fish Bowl with poor behavior, it gets amplified by the various tools that we've created. One of the great ironies is that some of the companies that created the tools that we use to talk about them don't like that we talk about them and or entities could be businesses or governments or educational institutions, whatever. So intrinsic branding is the antidote to this sort of addiction to attention, addiction to the shiny outer packaging and corrupt or rotten interior to be blunt about it. If indeed, linking it to what Emily said if indeed a brand has a soul that that soul starts with the senior leader or senior leadership team and permeates out from there to everyone that touches the brand.

It doesn't necessarily mean a New World, that if you're in the New World you're in a new brand. Southwest is a perfect example of intrinsic branding. They brand from the inside out. They put



culture first. Humans are not abstract. They use a common language. They don't BS anybody. They market, but they don't manipulate.

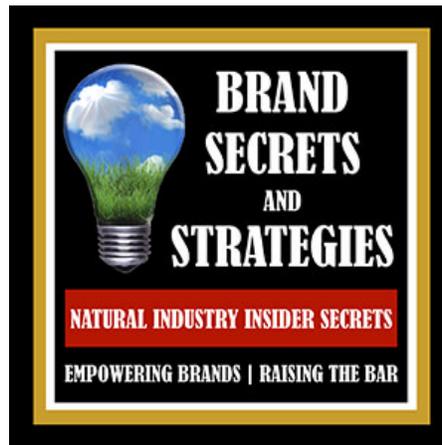
Dan: Love that. And by the way, forgot to mention, Emily whoever took that survey, a third of the people who spend time at work, they didn't talk to me. I imagine you guys too.

Emily: They're pretty conservative.

Justin: For entrepreneurs.

Dan: Exactly. The hardest working person in the natural channel. I love what you're talking about and this is why this is so critically important. This is why I really was looking forward to having this conversation. This is the intersection that I play in. On the idea that brands can manipulate consumers to take their product, that price is the only driver, that promotions, that manipulation is the only thing that gets people to buy the products that they want. The reality is that the core natural consumer does not want to be sold. They want to buy the products that they know, like and trust. The products that align with their missions, which is just exactly what you just said, Justin.

So that's what I'm trying to do. I'm trying to help brands leverage that in their story like what you were talking about Emily in terms of, how do you leverage that in your storytelling so that it resonates through the entire organization? To your point and I agree with you 100%. So many brands spend so much of their time talking at us. "We're great. We're big. We're number one. Hey, gosh look at what we just did," rather than having that one-on-one conversation like we're having today. The point is this.



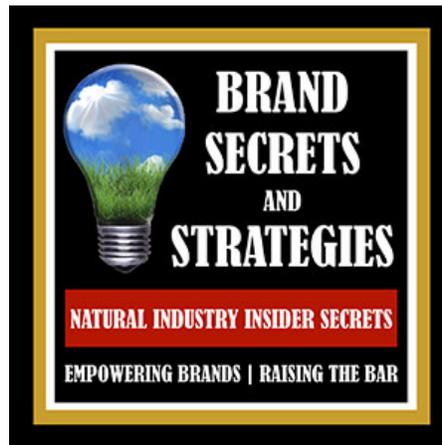
Brands that can authentically have that conversation are the brands that are going to have the most traction, the most runway et cetera. Those are the brands that are driving sales across every category. Your thoughts?

Emily: So what comes to mind for me, is something that we say and we teach, is that branding is knowing what conversations to have and marketing is having those conversations and so what we try to do is really to hone in on... If you're going to have a conversation you've got to know what that conversation is about and instead of casting about for "Gosh, what does the audience want to hear? What do I need to say for them to like me? What service do I really need to focus on, pushing out there that I'm the best at?" Instead of all of those tactics, we would say "What do you believe? What is your mission?" and then, "What is the category that you're trying to create in the world," and own a conversation around and that's where intrinsic comes into play.

So let's pull from inside of you what is most vital in your heart and also strategically because you're here to make an impact and let's build the conversation around those pieces and so doing beliefs work. I'm currently reading rereading Dare to Lead by Brene Brown and she talks about this. You cannot talk about the things that are important unless you've named them for yourself. So that's the work that we really do with people. Let's nail down your top five beliefs.

Justin: Well [crosstalk 00:15:05]... Go ahead, I'm sorry.

Emily: Oh, it's okay. Let's nail them down from a soulful level and then let's talk about how they exist every day inside of the brand as standard and instead of now putting down the curtain and letting



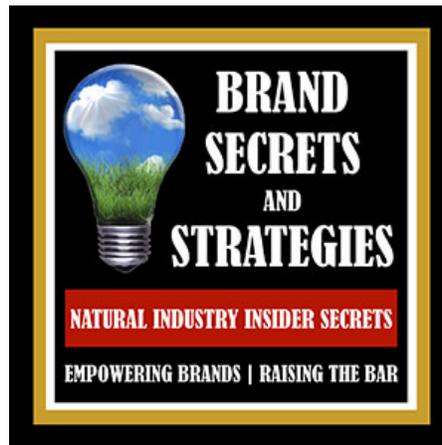
that be something internal to the leadership team, we're like "Okay, now let's share that with the world. Let's have conversations with the world around those things."

Dan: When you say... I was going to say my wife is actually reading that book right now, so I'm getting a little bit of insight into it. I'll read it next, but yeah, great from what I hear it's a great book. What do you mean when you say category? What are you talking about? The category in terms of the retailer or I'll let you fill it in.

Emily: Do you want to take that?

Justin: So category is kind of the latest iteration of what a positioning essentially and category is essentially owning a place in the marketplace that didn't exist before. So there's a general rule of category design, which is if you can't be number one or number two, create a new category. And category is the intersection of essentially well brain science and kind of cosmic attraction as it were and on one side to develop a category, you have to be able to identify and speak to an unspoken need. We didn't know that we needed Uber or Air BnB or the iPhone. We didn't know we needed that. We weren't asking for that, but there was an unspoken need that these brands tapped in to. And the other side of it is is that there's always an excess resource in order for that brand to occur.

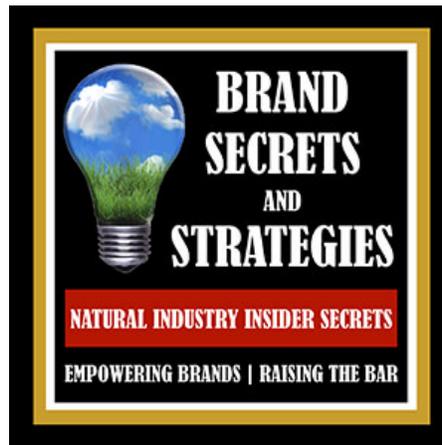
One of my favorite examples and I give proper credit to the book Play Bigger. It's dealt in Chris Lochhead and others that wrote that book is Elvis Presley. So Elvis tapped into the unspoken need of teenagers that were too young to fight in World War II, didn't know who they were, had an identity crisis and he spoke to them with this taboo music and their excess resource is that we had a



booming and growing upper-middle class that could go out and buy records and go to dances and do all the fun things you couldn't do in a Great Depression. He's still the King, all these many years later.

Dan: Great analogy. In my world, just to kind of back up a little bit, when people think of categories they think of the predefined. It's the milk category, the dairy category, the whatever. And I like the way you framed that because one of the things I think brands struggle with, especially in this industry, plays in nicely with what we're talking about now is that they're pigeonholed or commoditized or put into a box that doesn't necessarily fit them. For example, a vegan meat. So instead of trying to be like every other brand that are on the shelf and I use that term loosely, in trying to become more of the same this is the point of differentiation and again this is why I love what you guys are doing because you're helping brands authentically define and communicate that unique value to their consumer and to the retailer.

So how do you leverage that strategy when you're working with a brand? And I know you've got a course, so we can talk about that too if you want to weave that in there, but how do you work with a brand... If I came to you. I've got a great idea. My Mom likes it, which I joke about that a lot. In other words, more people than my Mom have to like it, right? But if my Mom likes it and everyone else likes it, how do I communicate the value of that? How do you help me see the forest through the trees and understand what's really valuable to the customer, to the future customer that I've created this thing for?

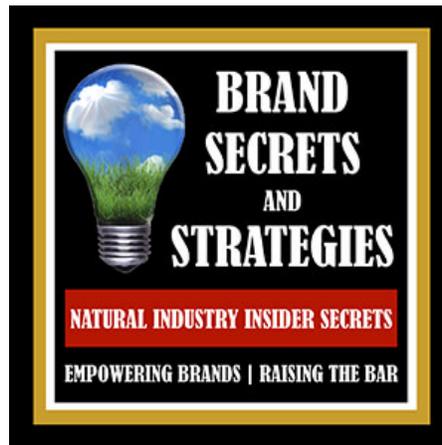


Emily: Well, as you know, nobody has to buy anything from anyone anymore. There is no, the scarcity that used to exist in the market does not exist anymore, which also means I can buy anything from anyone at any time and the products that are marketing around perceived differentiator, we would orient them back to why they exist in the world and I begin to sound a little bit repetitive-

Dan: No, that's good.

Emily: True differentiation is about the soul of the company and why did you start this vegan meat company? There are already vegan meats out there, so it's not a new thing. It's not a new product. So tell us the story behind and tell us what you're trying to do and so many companies today... I get so excited about it. So many companies may understand there is a for-profit and a for good essence that is driving them and again, we have been taught or cultured to understand that that, the four good pieces has to be separate or something that you do on the side, but it really is part of right now the most successful brands. A deep and obvious part of the way that they differentiate in the market and that's what people, human beings thankfully are responding to.

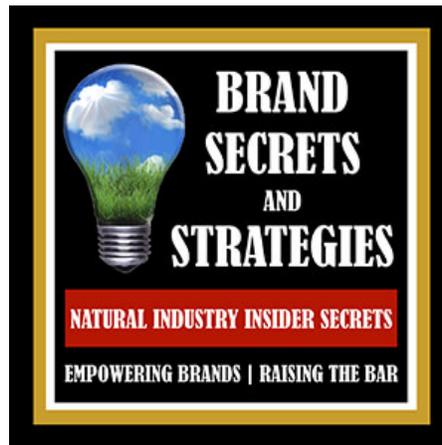
And so trying to differentiate on price or on the product, you can't do that until somebody feels that deeper connection, that love and trust, and people, I heard Seth Gordon say, "I know people buy from people that they love and they trust," and that has to be established first. So the way to do that is to open yourself up, which is terrifying and say "We are here to create a better environment. That's why we sell vegan meat." That's for example.



Dan: I think that's a great analogy, thank you and one of the frustrations that I have, is that the brands that we're talking to, the disruptor brands. The industry tells them that they need to differentiate their products or price. Price is the only driver in the show. If that were true, then decadent luxury items would all be declining in sales and we know that that's true. People would stop eating chocolate, God forbid. But my point, yeah I know. Can you imagine? Just kidding. So, but my point is trying to teach brands how to leverage this in their communication so that they don't become another commodity or another box blue-green, whatever the color is on a retailer shelf.

This is their unique point of differentiation that connects with the consumer. I have a belief that natural brands should not apologize for having high-quality ingredients that cost more. Consumers are willing to pay a premium for products that meet and exceed their needs. So when you're talking about this and you're leveraging that differentiation for good, one of the things that I find is that natural products are closer to their end consumer and as a result they're developing products or innovating based upon what people actually want rather than trying to fill a production quota or something like that. What is your experience around that?

Justin: I agree with everything you said there and some kind of a perspective on this especially as it comes to sort of the consumer products world, especially within your world of natural products is that there still is some of the same rules or methodologies or practices of branding. It doesn't really matter what industry you're in, these practices remain the same. One of them is and to paraphrase one of your fellow Coloradoans, John Elridge who wrote Wild at Heart is you've got to let the world feel the weight



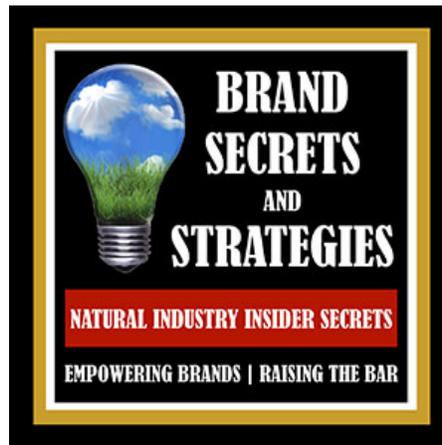
of who you truly are. There's no need for pretense. Just show them who you are. That's sort of step one. Step two is use language that inspires and invites. The language of saturation or the language of manipulation will turn off a higher conscious consumer every single time.

And the third is that the visuals can't suck. Packaging still matters. What it looks like on the shelf and what it feels like when you hold it in your hand from the quality of the materials to the story, I think of a great example of "This bar saves lives."

Emily: That's exactly what I was thinking.

Justin: Well there you go. They got all three of those things right and there are others. Kind does it well. Cliff Bar, still in the bar category, but each of them are not trying to be different than... This is the key thing. Each, especially in your industry, the most successful brands are not trying to be different from their competitors. They're trying to be just themselves. Here's who we are and I've noticed for example, Justin's Peanut Butter, which I have an affinity for because of its name and also I love any brand that can take a commodity, peanut butter or peanut butter cups and they're taking on Reese's with their peanut butter cups and their sales are going through the roof and Reese's is just kind of bumping along.

And they're doing that around some element of product superiority, but they are way more expensive than Jif or Skippy or any of those other peanut butters and I think you have to, if you show up in the world as who you truly are and you present it to them in a consumable way, the market will respond. Not all of the

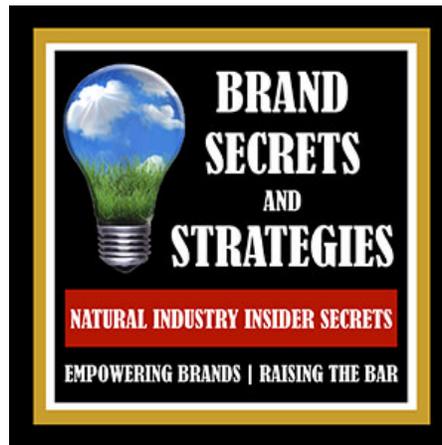


market will, but enough of it will so you will grow and be successful.

Dan: Justin was on the podcast. It's a great story. If you haven't listened to it you need to check it out, but the point being is he talks about how he differentiated himself. How they created the product out of necessity and part of the story had to do with how to keep his roommates from messing with or stealing all of his peanut butter, so yeah you want to listen in. And then putting it into the squeezable pouch and changing the category and your point is, that differentiating around, building around your authentic self. Be yourself.

One of the things that frustrates me about this industry, especially your side of the industry is that people use cookie-cutter strategies. If you're a dog food, well then obviously a baby food strategy is going to work for that or automobile oil or whatever and yet I don't think brands understand why it matters to work with an agency or work with a group or work with people that truly understand who their core customer is. I've never heard to your point anyone say that "I'm going to create a product that's going to be just like Brand X and I'm going to go to market with it and whatever." They're always the best, but then... I mean they're always the best, most disruptive, the most creative et cetera and they sing the praises about what's unique about their brand, but then they leverage the same strategy that every other brand on the shelf uses.

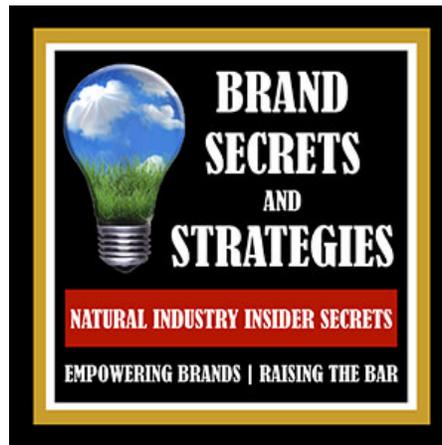
And that's really where I'm going with this. So how do you help a brand with that, understand why that matters, how to leverage what you've been talking about and build their strategy around it because I think that ultimately is where brands need to go. They,



in my opinion, need to start with why they're building a product, who the consumer is, how they align with it, all that stuff. So your thoughts?

Emily: What I wanted to say and it dovetails right into your question, which is taking a moment to take a breath to pause. We have been trained once again, to "Okay, I have this idea for the product. Quick, I got to get it out there before anyone else." It's this scarcity mindset that causes people and organizations to rush through a lot of the details and a lot of them taking a step back, as we often say pulling the car over to consider what you want to do, what you want to create in the world. How that needs to look and feel to be innovative to people, but we have been trained to be very competitive from the beginning and having a competitive mindset is okay, but in the beginning it can create a scarcity mindset and that leads to a lack of creativity, a lack of imagination around how you're going to roll out, how you're going to market, what your internal advantages are because of who you are as people and creating a business that will not only serve the market but also serve you.

So it's these things again. They're not separate things. We think they're separate. They can be the same thing and creating that space to pause and to intentionally reflect on how you want this to look while pushing out that scarcity or competitive mindset will save you time and give you a massive advantage in the long run. I think Justin's is a great example of that. Still running on that same spirit that was there from the beginning that they were very intentional about. Southwest Airlines, it took three years I believe of litigation before [inaudible 00:27:59] could actually start the airline. So he had this time to gestate and to actually



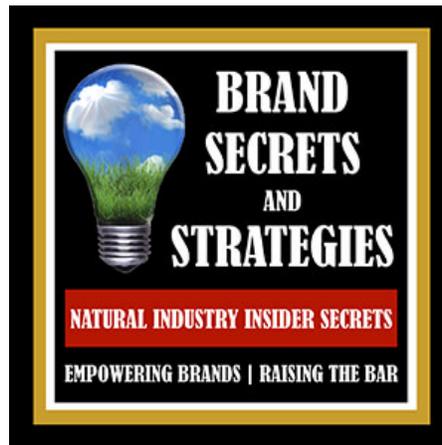
fight for these ideas that he wanted to be able to provide people a way to come together at a low affordable cost.

And so you see that gestation period in the brand and in the commitment to what they represent in the world. And that's where I think a lot of consumer products miss a huge opportunity to just create some space and some intentionality in what they're putting out.

Dan: Could not agree with you more. What we're doing when we talk about the courses that you've got because I'm sure that you cover some of this in there, but this is exactly why I created my free [inaudible 00:28:38] Self Stories Strategy course. This is the Achilles heel of every big brand. Let me repeat that. This is their Achilles heel. This is how I was able to push little brands around like Proctor & Gamble, Frito et cetera through my entire career because of they "phone" it in. They use the overarching, commoditized "This is why we're better," et cetera rather than trying to learn to speak the language as the consumers that they support or understand how to speak the language in my case, of the retailers that they're in.

This is the single greatest point of differentiation between any brand that wants to stand out on a shelf. So how do you leverage those strategies and I'm assuming that they're baked into your courses and if they are, can you talk a little bit about that and why that matters?

Justin: Absolutely, thank you for that. So our whole mission, our mission at Root and River actually has got nothing to do with branding. It's to inspire leaders to go inward.



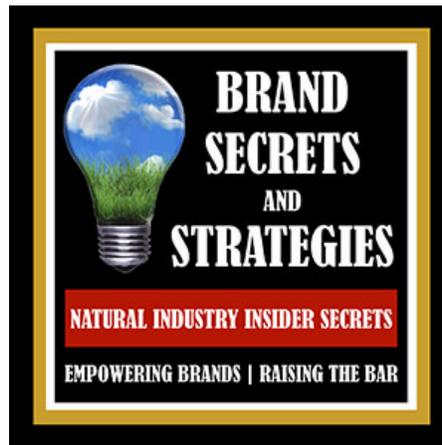
Dan: Like that.

Justin: We think that when leaders go inward, they reconnect to who they truly are. They connect to their own soul. They have different... They have an inner knowing, a wisdom, an emotional intelligence, spiritual intelligence. Lots of good things happen when you go inward. One of the good things that happens is that you know exactly who you are and there's no identity crisis. You're just going to go out and be you which then makes branding about two things and I think this is true across all leadership practices because branding is a leadership practice is that it takes courage and execution. So courage is the inner work to find out who you are and execution is building the plumbing and infrastructure and then doing it and then adjusting based on results.

So in the work that we do with our clients, there's kind of three tiers and I'll try to be as brief as possible. The first tier is the one you mentioned which is a course and we have a course called How to Brand Yourself Even If You Don't Want To and it's kind of an homage to the fact that people that are artistic or creative or mission-oriented can find branding to be a bit icky and disingenuous and we wanted to develop a course for people like that, sort of the achiever introvert. The one that wants to win, but doesn't want to do it like anybody else. And so that course is really designed for startups and solo brands.

Dan: Good.

Justin: The next level up is we do an engagement that's a personal private engagement with the owner, founders, leadership teams, what not called a root session and Em mentioned pulling the car over. We pull the car over. We bring the leadership or ownership



team in and we spend a day to two days digging into the essence of the brand. We do all of the inner work in this immersive setting so that we don't have to do it again. Because once you know what your brand is, you don't have to adjust who you are. You can adjust your tactics, but you don't have to adjust your standards or your identity, your inner identity.

And then finally on kind of the higher end of what we do is we do something called brand discovery and that's walking with a company and a leadership team, usually a CEO or a CMO along the full journey of becoming a brand and that usually takes 18 months to three years until your brand almost becomes this perpetual motion machine of awesomeness. And so our goal is to provide offerings like our course, like the root session, like brand discovery, that wherever you are in your journey, we have something that is helpful to you if you have the courage and you have the discipline to execute.

Dan: On that note, when you're talking about how to brand yourself, even if you don't want to, love it because a lot of people think of branding as being that slimy thing that marketing. You're a used car salesman if you're into marketing and no shine on them. I know a lot of great people that are in that career, but that high pitch, high kind of a slimy marketing approach, helping people understand how to brand themselves authentically, I think one of the things that I struggled with is I never learned how to play politics, because I wasn't interested in that and as a result never learned how to sell myself when I was working for big companies. I had a lot of great successes, but my point is that there's got to be that balance and that balance I believe comes from a healthy understanding of who you are as a brand and then how you



interact or how you relate or how you become a part of a bigger mission. Your thoughts?

Emily: I agree completely and I think the thing that's missing a lot of times in that work is then the words of mouth. So word of mouth is always going to be the most effective way of growing your business and growing your brand and so people really struggle to translate, "Okay I know who I am. I kind of know who I want to be, but how do I have that in a conversation where I'm talking to my boss and I have this idea and it is a career moment. How do I weave that in and how does it show up?" And so that's where we really focus on, giving people a narrative that is very conversational that allows them to differentiate in a moment.

Because brands are born in conversations. You can do all the work in figuring out who you are, but until you know how to speak and move a conversation towards who you are and what you want to express, you won't be very successful in conveying that brand succinctly and then also consistently. My formula for marketing is it's not rocket science, it's pretty simple. It's clarity of message delivered very consistently over time. And when you know, thank you, when you know those words that help you with that consistency and over time.

Dan: Well and let's go one step further. When you show up as an authentic brand, then you can leverage what I would call the pull strategy versus the push strategy. So backing up way back in our conversation, the push strategy is a strategy that every brand uses. I'm going to promote the heck out of it. We're going to use bright, shiny lights and bright colors, whatever but, and we're going to just tell, "Buy this. Buy this. Buy this. We're great. Here's why you need to buy this," et cetera. Price driven, heavily

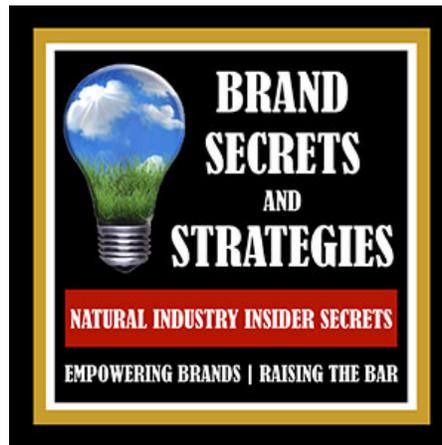


promoted, et cetera. That's the push strategy that everyone uses. [inaudible 00:35:12] expensive, it's pay or play.

A better strategy is the pull strategy. So bringing this back up to where we were to find that balance and be able to leverage what you bring to the table as a brand, as an individual brand and authentic brand and then having, creating so much value that other people sing your praises. In other words, people go to the store and ask for your brand by name because they know, like and trust you because they know that they're going to get exceptional value from you. Or as we were just talking about it a minute ago, people referring you, recommending you based upon the fact that you've delivered at such a high value.

Instead of saying, "Look at me. Aren't I great? Why I've got a great resume, aren't I impressive?" Instead, it's about what you bring to the table and what is your authentic mission? What are you trying to help brand? Love the way you framed that. When you're talking about your root session, finding the essence of their brand, who you are, how does that weave into that and then so if I work with you, do I have to go through the courses first or how does this work?

Justin: Thank you for that. I just on a point of what we were talking about before I go to that is over-promotion is a sign of insecurity ultimately and you can see this with sloganeering and propaganda and everything and paying for attention instead of paying for retention. There's a lot of human behavior infused into that sort of desperate marketing. One more spray of cologne does not make you more appealing. It's an insecurity issue. So the course is, certainly anyone can go through the course, but I'm going to work backward from whether or not you go through the

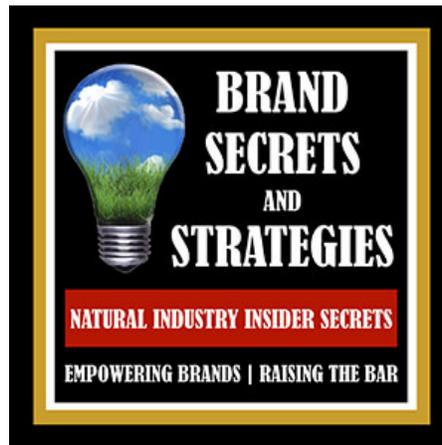


course or you go have a root session or you do full brand discovery with us. It's the same intention.

And that is is that we're going to identify the brand, not from some sort of external construct, not from focus group data or demographics or any of that stuff. All that stuff is, I mean it is what it is, but we don't look at branding that way. Really what the three things you want to nail down and this is true in the course, roots session, brand discovery, is the first thing is you have to have a crystal clear mission and not a mission statement, but what we call a walk around purpose. You'd carry it with you in your heart and other people are enthused by it. Enthusiasm is a natural contagion. And so you have to know your mission and we figure that out with you if it's in a course, we're guiding you through it in a self-directed way with our videos and worksheets and our root session live in person with you.

We're digging in. We're cracking you open and we're finding that mission. And the second thing is then the message or the language is like Emily said. When you get the language right you solve 1000 marketing problems because you have confidence then. You're like, "Aw, this is what I wanted to say and I'm excited to share this and I can imagine myself saying this," and we start to what we call to make it real. It starts to permeate into, "Oh, this could be on the hero image," or "I could put this on the packaging," and it's magical to watch that feeling of like most people are experts at what they're making and amateurs about talking about it and when we help coach them to be experts in the way they talk, that's a powerful thing.

And then the third thing is a plan. You've got to know what you're doing because there are so many options. We often joke that



seriously, sort of half-joke that our main competition is terrible advice.

Dan: I love that.

Justin: We want to give you, we want to help you craft a branding and marketing plan that is number one, in alignment with your business model. Number two, it will line up with your ethics and morals and number three, in line with the mission of the overall brand and then you can decide whether or not you're going to do funnel marketing or social ads or TVs. All of that gets decided after you get your strategy in place because there's plenty of tax to summon. Here's the secret. They all work. They all work if you have the right language and you're consistent.

Dan: Love it and let me go one step further, kind of reframe it, take it to the next level if I may. The reward is relevancy and what I mean by that is so many of the brands and the retailers out there are constantly trying to reacquire the same customer over and over and over again. I was talking to the former Director of Whole Foods Market on the podcast. They're paid \$270 to reacquire a customer. That's insane. That's money that they have to take from us the consumer in terms of price, et cetera, but it's even more when you talk about the big retailer, so the big brands. My point is this, the reward by having that authentic message, by leveraging the strategies that we're talking about here and by being able to use the expert, using that strategy, using that terminology, but be able to use that in your authentic story.

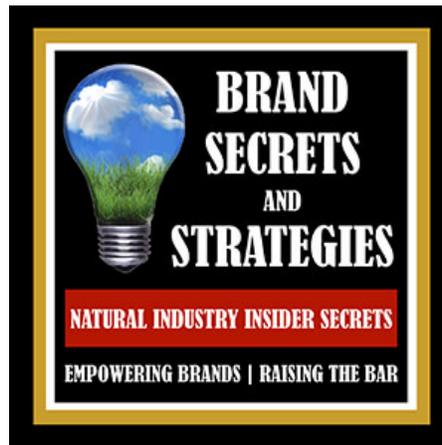
The pull strategy is that instead of having an occasional customer, you now have loyal [evangelists 00:40:31]. One of the things I talk to a lot of people about is loyalty cards. To me, that's a



coupon. In other words, I've got a loyalty card for every airline I fly on, for every retailer I shop at and so do most customers. Loyalty is something that is, you can't buy that. You can't charge for that. It's something that has to be authentic. Loyalty is something you can't buy it. Something that has to come from an authentic place and my point is that that relevancy, that ability to connect with the consumer to develop a loyal relationship, that's how you convert an occasional customer to loyal evangelists. That's how you build a community around your brand. Your thoughts?

Emily: You know, I agree with everything that you said there. I'm really focusing on, we say love and truth, but loyalty is something that you're trying to inspire and engender from your audience is a really sound strategy, but here's another truth that sort of weaves through what you are saying and it's that branding is much more about repulsion than it is about attraction and I know that's a mind flip for people, but we think, "I've got to attract all the people. I need to get all the customers to buy my product," and that's the space that we come from, but actually what you want to do is efficiently repel the people who do not believe what you believe and do not have the potential to become those evangelists. At the outset, right away, as soon as possible so they do not get into your system and muck it up and take your time and energy or become a customer that just is actually the bane of your existence.

So when we speak from a place of truth and belief and mission, that repulsion happens quickly and now it leaves more space, more energy for people to find you and come back and for that loyalty to build. So if we change the way that we think about



branding, it opens us up to move forward, take a big step forward in courage to say, "This is who we are and this is what we believe." I think that that is a truth that people need to understand when they're looking at push-pull and when they're looking at how they position themselves in that, whether it's a product or a service.

Dan: Well certainly. You never want to try to be all things to all people. So that makes sense. It's an interesting concept. I hadn't thought of it that way, but it does make sense. Again, if you can't be all things to all people, then you'll never be anything to anyone. I don't know, I messed that up I know. But along those lines, yeah you've got to be able to communicate the value of what you offer and not try to be another me-too brand and these are the people we love working with because these are the people who differentiate themselves. You have a term that you use, defiers. Can you talk about a definer? And what that means and why that's important?

Justin: A definer is what we would call this archetype that we've created. So everything that we do as a brand, we teach you how to do. So we want to always be a good role model as it were for branding. So when we... We don't do target audience. We think target audience is the wrong mindset to think about your audience as some sort of target that you're trying to hunt down and kill or whatever. Number two is, most of the demographic data is completely useless now unless you're selling to evangelicals or the orderly. Those are two data points that are useful. Everything else? Everyone goes their own views and opinions and biases. So you've got to go deeper.

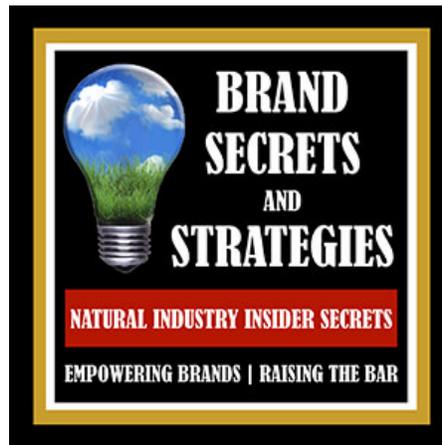


You have to talk to their souls. So a defier is what we call our customer archetype or our ideal client and a defier has a couple of traits. A defier, first of all, is very mission-oriented. We have a client that is the founder of a capital management company and he early on in his life, when he was 13 or 14 wanted to build a business that could fund a non-profit to help eradicate genocide. Now we all don't have to have that kind of mission. We're not all going to be going to your Mother Teresa of this wonderful man that we were talking about, but there is something inside of you that is your mission that when you tap into it, you know what it is. You have this inner knowing or inner calling. That's number one.

Number two is that a defier wants to win. So these are not woo woe. Like sort of the passive people. They want to win, but they just want to do it on their terms and maybe most of all and you may have some other takes on this, so I don't want to take it all up, but most of all to me and this is more my personal view of what if I know someone's a defier, is when they have an absolute aversion to sameness. They're repulsed by sameness. They have the courage to be different or they've demonstrated the courage to be different. And that's why most of our clients are kind of odd people and they're quirky and they don't remind us of anyone else we know.

Because they're defiant. And I don't know who said it, I think it was [Aldis Huxley 00:45:48] is "One of the greatest acts of defiance you can do in modern society is be yourself." That's what a defier is.

Emily: Very and there are people who, they are so defiant and we've come to think of that in a negative connotation, defiance, but we



actually see it as a huge positive and they want to change the world with their work. Now I'm not saying, the one example that Justin gave at the beginning on ending genocide, it doesn't have to be that big, but they may want to change the world within their industry. We have another client, Stream Logistics, and they are a concierge logistics company. They wanted to change the fact that within the logistics industry there's tons of uncertainty and there's a lot of players who come in and they're shady and the shipments never get sent and the broker that you worked with disappears. Their mission from the beginning was to end the uncertainty in transportation and they felt extremely passionate about it and they wanted to win and they wanted to do it in their terms and from the place of truth.

So they were a great match for us, these two amazing co-founders who were committed to that mission first and then had begun to build that business and then we met at the [inaudible 00:46:59] right before some huge growth for them and we were able to nail down the essence of what had always powered them and we forget, as entrepreneurs we forget ourselves. We forget that we are our greatest asset and so these defiers, they're eager to learn, but we also teach them how to hone in on this language as a form of self-care. Because you, as an entrepreneur or as a start-up, you are your greatest asset, but we often treat ourselves instead of like the race car, fine-tune the machine that we've put all this time and money and energy in to, like a rental car.

We're just getting ourself in the car and then just slamming on the gas and go, go, go until you have to fill it back up and return it and so we try to shift that thinking there for our defiers



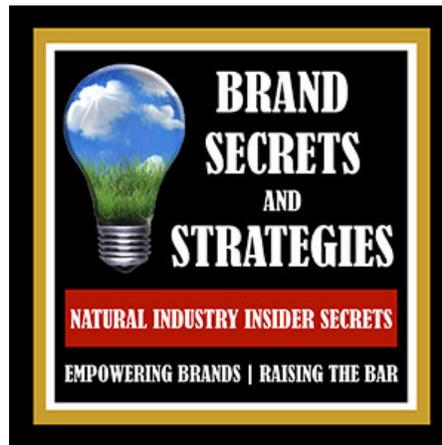
because they're so passionate and they're so driven to make a change in the world, they sometimes lose those pieces.

Dan: Love the analogy about the rental cars. I get that one completely. I wonder, what would you think about this terminology? I would throw in there that the person that you're talking about isn't focused on wanting to win on their own. They win through the success of those people that they're supporting and helping. Your thoughts?

Emily: That's a great point. Absolutely, they're very collaborative is the word that we would use. They don't want to just learn something, they want to share it and they want everyone to come together.

Dan: Those are the brands I work with. Those are the brands that I cater to because those are the brands that are trying to make a real, sustainable difference. I am making a greater impact. My mission is to make her healthy way of life more accessible by getting their healthy products on more store shelves and in the hands of more shoppers. The point being that the more they're able to succeed, the more good they're able to do to help with those causes. And so being able to leverage a strategy, so now we've harped a little bit about what matters. Weave this, going back to what you were saying earlier to Emily, in terms of your story, how do you weave those into your story so that it's communicated in the same authentic voice. Every aspect of your cell's funnel. So your thoughts?

Justin: So one of the takeaways from working with this is one of the main outcomes of our work with a client is called a root belief and a root belief is where all your language of your brand springs from and you return again and again. Every, you do it on your



website, you do it on every conversation, you embed it into your pitches, it goes everywhere. And it's not a slogan. Most great brands don't have slogans, because they don't need one because they are being themselves is the brand. And so a root belief is one thing.

Number two is, as we talked about earlier, you have to know your category and all of your strategy like your tactical and your marketing strategy and the tactics that you use are all aligned with running your category and that takes time. You're planting a garden. It takes time to grow a category because the market takes a while to understand what you're talking to them at a soul level and not at a conscious mind, manipulation level. The third thing is to tell stories and it sounds a bit simplistic, but if you're mission-driven and you have a superior product and you've got a great culture, you have stories all around you, but there's no story capture device because of the thinking.

So if everyone, and we would encourage anyone that's a founder or head of marketing, to think in terms of where's the story? And then capture it and I really do believe in a decent size organization, the head of marketing's primary job is the retelling of other people's stories. It's not to pitch a boilerplate, like marketing copy or well-crafted marketing BS. It's to tell other people's stories. Whether that's internal stories with your employees and your vendors or technical stories. Whole Foods, back in the day really before the acquisition, they were masters at telling other people stories, not just their own.

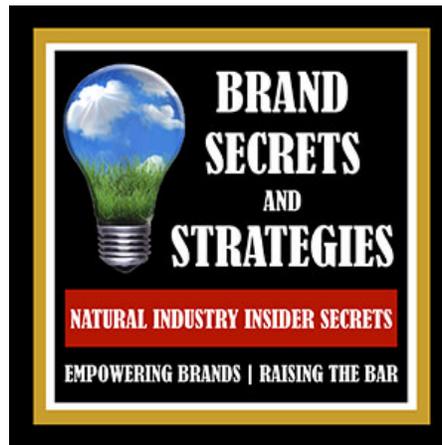
Emily: I think the other thing too that people really struggle with and as a journalist, I would say probably say nine times out of 10, the first thing I would do after I did all of my reporting, was thinking



about the lead. So how do I tell this? I want to tell a story, but how do I do it? And so this is a hack for your listeners and something for everybody to sort of, take away is to think about what you... Instead of trying to figure out how to tell the story, look at your list of beliefs. Look at your mission if you have those things, whatever you've got. And now think about the story that you want to tell and use that mission and that belief as to the lens through which you're going to tell that story. And that just gives people an entry point for telling the story in a cohesive way that reinforces the brand.

So a client who works with us, they walk away with a really having established five core beliefs and five core standards that come out of that. So now, that becomes a wellspring of content and storytelling and you can tell stories about where that belief came from. Tell stories about how a client really took that standard and they had a wonderful customer experience because that standard was in play with the product experience. So those are just entry points and they become really powerful in a brand, particularly the longer that you do it and the more disciplined you are about telling stories in that manner.

Dan: That is so critically important that that story gets told in the same authenticity, the same excitement and passion as the founder. The reason, actually the impetus of the free Turnkey Resource Strategy course is that and where I'm going with that and get your thoughts on it, my point is this. If you've got some great stories, but they're told from different perspectives and they're not shared with the same values and the same mission and the same authenticity, then your story becomes inauthentic. Back to what you were saying earlier about living in a fishbowl. Back to

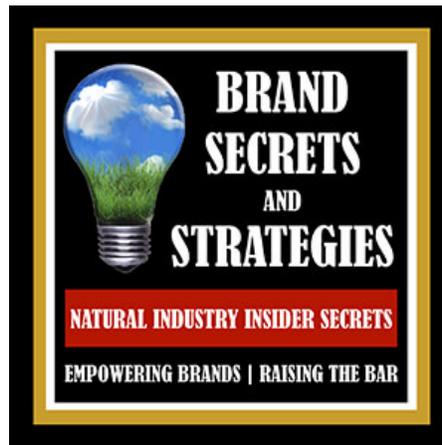


what you were saying earlier about being authentic and transparent. So how do you help brands communicate that story the same way and in the same voice and with the same passion and authenticity et cetera throughout the entire sales funnel, throughout the entire organization so that the consumers can bravely and the consumers can actually share that message back to them. I don't want to say parrot it back to them, but it becomes a part of who they are. Your thoughts?

Emily: Well I think this is where discipline, message discipline comes into play and we, you can't establish that right out of the gate. First of all, you need to establish the language from a true place and then begin to talk internally and to enroll your internal team if you're the head of marketing in this language. And as a recruitment, and the role's probably not the right word, but as an engagement practice, how does this standard show up for you? How do you think we're meeting this standard in our work? How do we think that we're not meeting it? Where is there still work to be done? So branding is very much like a tree. It grows out in concentric circles. So we begin internally and we begin to practice that language and the discipline internally.

And then that will naturally, organically flow out into the work that we're doing and the stories that we're telling and as the leader, it's your responsibility to usher that or to nurture that practice. So branding is a practice. It's not something you do the first session and you're done. You have to continually practice in a disciplined way this clarity and consistency over time.

Justin: I would just add to that, it's similar to what we said about looking ahead of marketing, whatever that role may be. If you're the chief cook and bottle washer, then it's you, but if you delegated



marketing to someone, their primary job is to find the stories and so there's some consistency, there are some ways to create consistency. One is that you put faces and names on everything. You show them, real humans. One of our clients in Phoenix is an organic natural food product company called PB Americana and they have peanut butter and they have a mission to eradicate hunger in the world and it's very sincere.

But the way that they structured their marketing with our coaching is they put real people in it. They put the founders. They put customers. They put vendors or brokers in their marketing. To put faces and names in it. Treat it like a small-town newspaper as it were. The second thing for consistency is to pick your medium, your primary medium or platforms that you want to master and get really fricking good at it. So if it's going to be, if your market is going to respond primarily to email marketing, become a master at email marketing or find someone that is a master of email marketing. If it's my younger son, Dad plug here, @reluctanthobo on Instagram has built an entire art brand only on Instagram and he's mastered that as the medium for which he sells his art and so that's number two.

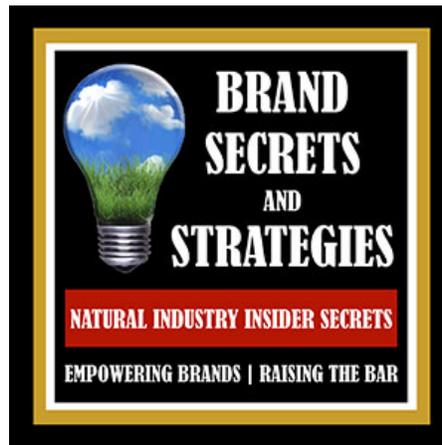
And then number three is the founder can not hide behind the logo. The founder has to be the overall face of the brand. They have to go out and be on the podcasts and write the book and maybe even watch their own podcasts. They have to be the face of the brand because people are not, that's what they're buying. They're buying that human spirit behind the brand, not the logo. They're not buying the logo. At least higher conscious consumers are not buying the logo.



Emily: Here's another trick about storytelling is to don't just tell the safe story. Don't tell the story they're like, "Oh, everything's great." Try to dig underneath that and tell some of the risky stories that make you feel a little bit vulnerable. That's really when you talk about being authentic. When you tell a story about how things went really wrong and then maybe you made it right or maybe you didn't but you learned something from it, those are the stories that really get that loyalty. We were talking about loyalty earlier, that loyal base. No brand. No successful brand has ever just suddenly overnight had a loyal base. It begins with a few people that have really been touched and that requires a vulnerability in your stories.

Dan: Thank you for sharing that. It's one of the things I like to focus on this podcast is being able to have the founder better more effectively communicate that authentic story, whether it's they found, I'm going to say religion in terms of healthy food from the standpoint that they're trying to solve an ailment or something like that. On one podcast, one of the founder's sons, it was actually Jackson [inaudible 00:58:17]. The founder's son, the doctor basically said, "Hey, he's got so much time left." Kind of wrote him off. And yet because of her commitment to the brand, understanding food, and nutrition, saved his life. He's thriving, et cetera.

My point is this. These need to be baked into your story, into your branding, as you said, thank you. And this is what you need to leverage at shelf with retail. Instead of going to retail and saying, "Hey, I'm a great product, great brand, got a great tee-shirt," et cetera, here's the consumer that I drive into your store. Here's what unique about them and oh by the way, when they buy my

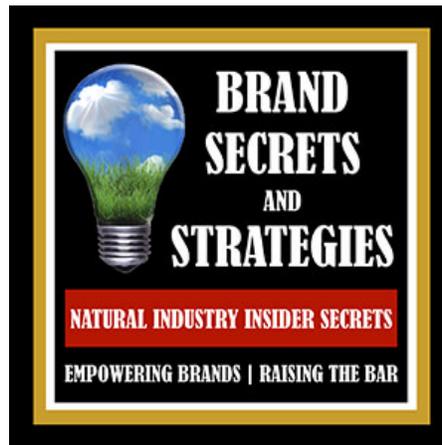


product, here are the other things that they buy along with it. Focusing again, backing way up into the mission, the ingredients well beyond the four corners of the package, et cetera. Your thoughts?

Justin: Absolutely. Put your story... I mean it's a simple thing, but hard to do as most simple things are is to put your story on your packaging. One of our former clients, a company called What A Farms in Idaho. They were a farm to store companies. They didn't go through food brokers and they had the same old packaging as everybody else with the same promises, organic, show the potatoes and all that and we did a full overhaul of how those showed up in the aisle as it were, in the potato section, starting with the way the packaging felt in their hand when they picked it up. That it was different from the first second and this is why we say branding takes courage.

Because you can't be different eventually. You've got to be different in the way you feel, all the sensory stuff, you've got to be different in the first second. The market is a fickle mistress. They'll just move along, but when they notice something different, they pay attention to it. We sometimes call it the Bacon Rule. Everybody knows what bacon is, even if you don't eat it and you know it's different and I think that what that does, this idea of infusing your story into every place else. You're not trying to pitch. You're not pitching. You're not trying to change anybody's mind. You're saying, "This is our story. We think it's awesome and if you like it, buy from us and if you don't, that's okay. We're not here to persuade you to do anything."

We often say to our clients, "Don't pitch. Don't preach. Don't plead. And don't persuade." Those four things are going to



change the dynamic of your relationship with the marketplace to much more of a subservient rather than a pure based approach.

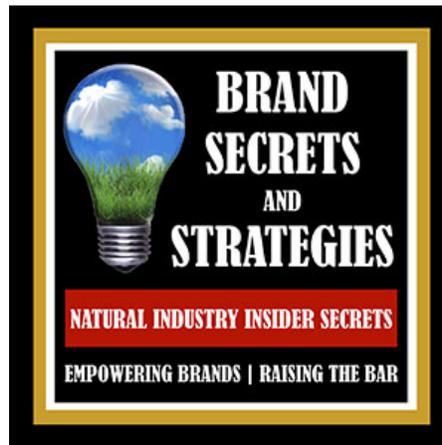
Dan: And the validation of that is that in this industry brands are focused on velocity. The reality is that a big brand with deep pockets can buy a lot of velocity, but that doesn't mean anything. The brands that are contributing to the profit and the growth of the retail, just in the category alone, beyond the other products those consumers buy, they contribute more to the retailer in terms of overall growth and profits et cetera. And that's a whole other conversation. What I'm getting at is that the win is, those that are aligning with your customers, being able to communicate that story is so critically important. Thank you so much for sharing all this. Is there a specific bottleneck that I can help you with or the brands that you're working with?

Emily: Great question. I think the bottleneck is only courage which is difficult. So to work with us we say branding is an act of courage and so we're not here to convince you just like Justin said, we practice the branding that we teach, but if there's something that's appealed to you in something that we've said and it feels right, we just welcome people to reach out to us and visit our website and learn about us. We have a book coming out very shortly about modern branding and you can purchase that in just a little while, a couple of more weeks and it'll be on our website.

Justin: It's always free to be our friend.

Dan: I love that. No charge, right? No, that's great. Well, thank-

Justin: So we're very accessible in the sense of social media, our emails. We do a variety of ways to just... We want more higher conscious



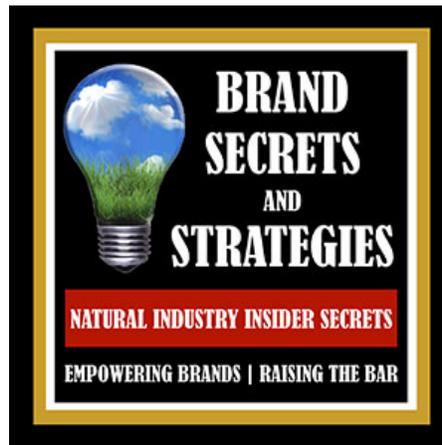
leaders, especially within industries where they're battling the dragons of manipulation and we want to arm these wonderful defiers with inspiration and information for them to go out and do this.

Dan: That's exactly why I was thrilled to have you on the podcast. Thanks again for reaching out to me. Great segue by the way. So how can people get a hold of you? What's your website? What other information do you want to share? How do they reach out with you individually?

Emily: Absolutely. So they can go to rootandriver.com and visit our website there, sign up for our email newsletter as well and our handles on social media are Root and River and then my personal handle is @emilyatlarge.

Justin: And mines @fosterthinking. Also, we have our own personal brands as they were because we're a partnership. @rootandriver is the platform for which we share ideas, but there are other ways to access us to see what's important to us individually and personally. And as Em said, we're going to have, the book will be out soon. So if they sign up for our newsletter they'll get an alert when the book is available and we also will be releasing our 2020 brand lab dates very soon. So if you sign up for our newsletter you'll get that too. Brand labs are virtual two-hour sprints focusing on very very specific branding issues like messaging, like category, like customer profile, those types of things.

Dan: This is so important. Thank you for sharing that. I want to make sure I put a link to you to the website, to everything that we've talked about in the podcast show notes and on the podcast webpage. And the reason I love what we're talking about is that



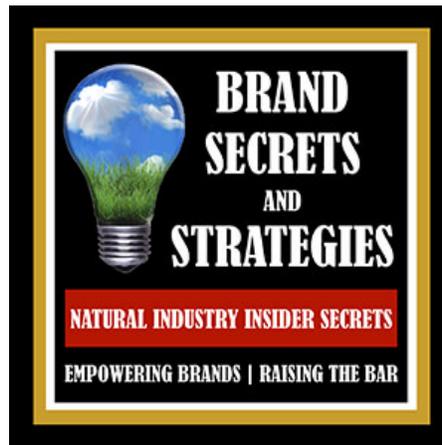
brands need, and when I talk about brands, actual products. They need to do more to understand exactly what you're talking about. It's the foundation for everything that you do going forward and to your point Justin, if you don't get this right, in the beginning, it's going to cost a lot more fix it and I mean this kind of a little bit, a little sarcastic. Pay me now, pay me later. Whether you hire me or not my point is this. The higher an expert like you, to come in and solve a problem that someone created because they didn't take the time to do the hard work at the beginning, it's so much more expensive and in addition to that, it can triple and derail our brand. Having the right infrastructure, having the right branding, having the right messaging from day one, that's the big one.

That's a great opportunity. Thank you again for sharing your time and your insights and I look forward to our next conversation.

Justin: Awesome, thank you so much.

Emily: Great.

Dan: I'd like to thank Emily and Justin for coming on today and for sharing their insights and don't forget that they've got a book coming up soon. I'll be certain to put a link to their website in the podcast show notes and on the podcast webpage. Today's free downloadable gift is my Turnkey [inaudible 01:05:44] Strategist Course. This is a course that will give you the foundation to leverage what you learned today to help you grow sustainable sales and for anyone that has the discipline to use the strategies contained in this course, you're going to gain a significant and sustainable competitive advantage. Simply put, this is going to give you the framework that you can build on so that you can



leverage the skills and the strategies that you learned on today's podcast and every other podcast.

You can get there by going to brandsecretsandstrategies.com/growsales. You can get to this week's podcast show notes and the podcast web page at brandsecretsandstrategies.com/session154. Thank you for listening and I look forward to seeing you in the next episode.

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Thanks again for joining us today. Make sure to stop over at brandsecretsandstrategies.com for the show notes along with more great brand building articles and resources. Check out my free course Turnkey Sales Story Strategies, your roadmap to success. You can find that on my website or at TurnkeySalesStoryStrategies.com/growsales. Please subscribe to the podcast, leave a review, and recommend it to your friends and colleagues.

Sign up today on my website so you don't miss out on actionable insights and strategic solutions to grow your brand and save you valuable time and money.

I appreciate all the positive feedback. Keep your suggestions coming.

Until next time, this is Dan Lohman with Brand Secrets and Strategies where the focus is on empowering brands and raising the bar.