I am a curious mind with a propensity to search for and cultivate creative solutions. Among my work, included here, you will find projects where I have partnered with teams to reimagine systems and services that enable human centered experiences. In the field this work is often called Product Design or Service Design, some may even call it Human Computer Interaction or System Design; I just think of it as learning about humanity. If you want to know why, or how or about any of the details about the work here, please reach out and I'll be happy to discuss them in detail. In the meantime, I hope you enjoy the breath of human curiosities included here.

– Namreta Kumar
http://www.linkedin.com/in/namreta

Product Growth

Entertainment & Media Client

June 2024 - March 2025

Enhance iHeart's app to create an experience that engages audiences daily with a strong focus on growing live radio and podcasts. Uniquely bring our different content types together with a host of features that promote listener adoption from other platforms.

A strong bond already exists between radio and podcast listeners and their hosts.

We believe listeners deserve more opportunities to connect with hosts and engage with their curated recommendations.

80%
of listeners say they trust and value their favorite radio personality's opinion
Musical Pursuits

59%
of radio and podcast journalists said they feel extremely or very connected to their listeners
Pew Research Center

" Honestly, I trust the hosts of podcasts I love more than anyone - Survey participant

Although discovery is top of mind when choosing a streaming service, dissatisfaction remains with the 'algorithm'.

We believe listeners deserve to be empowered with more agency and visibility into what is recommended.


Across competitors, algorithms act as a 'black box', providing limited context as to why or how recommendations are made or providing users the opportunity to provide direct input.

> " I feel like the algorithms still haven't figured out my complex taste and often recommend things you'd expect me to like in theory that I hate in practice!
>
> – Survey participant

Podcast, radio or music listening are inherently social experiences.

We believe listeners deserve more opportunities to connect and share with like-minded listeners.
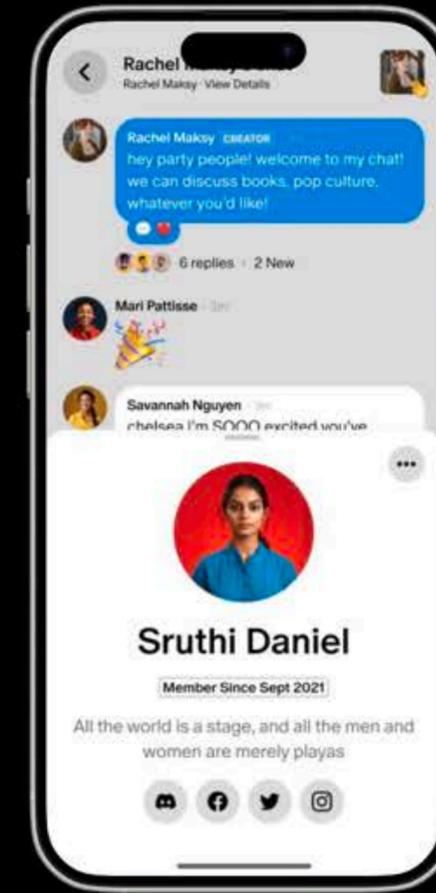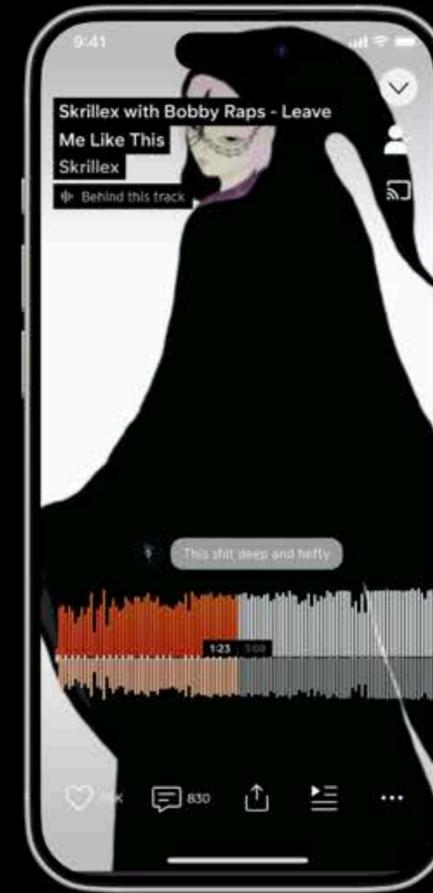
Limited opportunities for social interaction in the context of listening experiences. The majority of listener-host or listener-listener interactions happen off-platform.

68%

of listeners say they like to discuss what they hear on a podcast with others

Pew Research Center

The opportunity

To grow on-platform listener adoption, we must make the iHeart Radio app the place to engage with iHeart content — providing value-added and scalable features that facilitate cross-content type discovery, embody the immediacy and human connection qualities of live media, and boost the listening experience to make users want to come back time and time again.

Beyond just a place to listen, the app should expand to become a more alive, aware, and relevant service: a companion for users to engage with culture in the making.

Experience Pillars

Contextual

Proactively anticipate what the user wants to listen to, when, and where – dynamically learning and evolving with the user's input and tastes
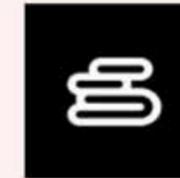
Shared

Shift the listening experience from passive to active and from solo to connected – embracing radio's ability to connect, foster community, and broaden perspectives

Curated

Uplift and empower content creator's voices and their role as curators in today's culture

Dialed in

Celebrate users' desire to "rabbit hole" and deep dive into their favorite artists, music, shows

Contextual

The AI DJ is a conversational companion that Jamie can interact with (whether through voice or text) to better personalize her experience over time.

It proactively gets to know her tastes via dynamic prompts and quizzes and enables her to ask for specific recommendations, based on her context or mood.

Why it works

This allows the user to have visibility into their taste profile and the recommendations being made. Enabling the user to directly interact with the recommendation engine via a conversational agent will improve the accuracy of content recommendations and thus increase user satisfaction.

AI DJ

8:05

Live

All   Music   Country   Rock

✦ MORNING

Pop Quiz   ✕

build your own **DJ**ai by revealing your tastes

Learn More About Your Data ›

Musically, what gets you **grooving during dinner prep**?

Record a sound bite   🎤

8:05

▊▊▊ Listening ...   ✕

Radio Station   Yacht Rock   Slow J

I'm looking for something easy and slow, a good Yacht Rock station. Play me good dinner tunes, no commercials please

Add related tags

Adult Contemporary   Dinner Jazz

Soft Rock   Bigband   Jazz

Shared

Jamie likes to listen and share podcasts with her friends. With the iHeart Radio app, she's able to create and host a podcast club, where she and her friends can add different podcasts to the queue and have discussions about what they listen to.

If there's a moment she loves, she can easily select and share a specific quote / clip from the episode.
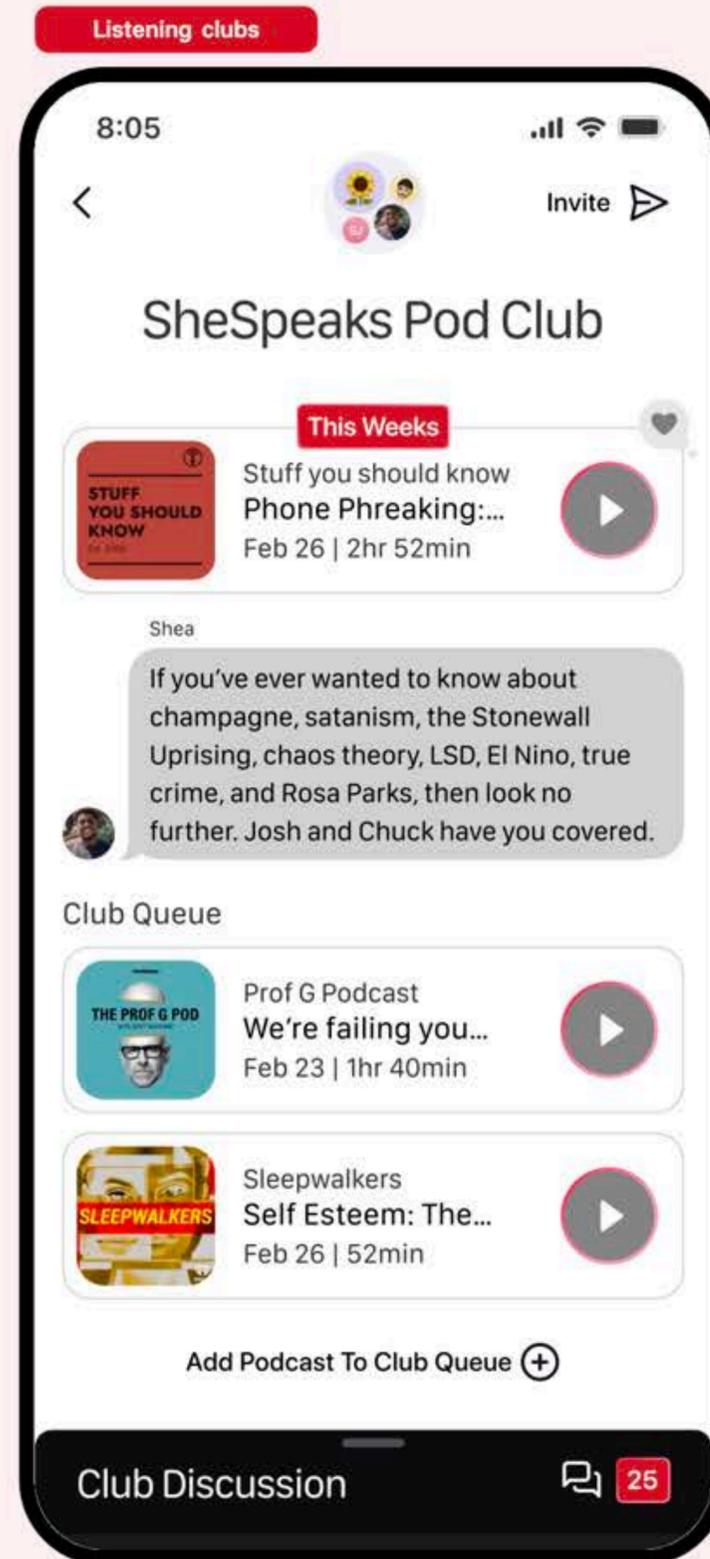
Why it works

We enable users to have a shared listening experience and empower to connect, comment, react, and share with friends over what they listen to.

This creates opportunities to capture new users via social shares and app referrals and fosters recurrent usage and stickiness of the app.

Listening clubs

8:05

Invite

SheSpeaks Pod Club

This Weeks

STUFF YOU SHOULD KNOW

Stuff you should know
Phone Phreaking:...
Feb 26 | 2hr 52min

Shea

If you've ever wanted to know about champagne, satanism, the Stonewall Uprising, chaos theory, LSD, El Nino, true crime, and Rosa Parks, then look no further. Josh and Chuck have you covered.

Club Queue

THE PROF G POD

Prof G Podcast
We're failing you...
Feb 23 | 1hr 40min

SLEEPWALKERS

Sleepwalkers
Self Esteem: The...
Feb 26 | 52min

Add Podcast To Club Queue ⊕

Club Discussion   25

Save and share moments

8:05

♡ Stuff You Should Know

STUFF YOU SHOULD KNOW

PODCAST

15:00 ▬▬▬▬▬▬▬▬▬▬ - 49:00

Stuff you should know
Phone Phreaking: The Advent Of Hackings
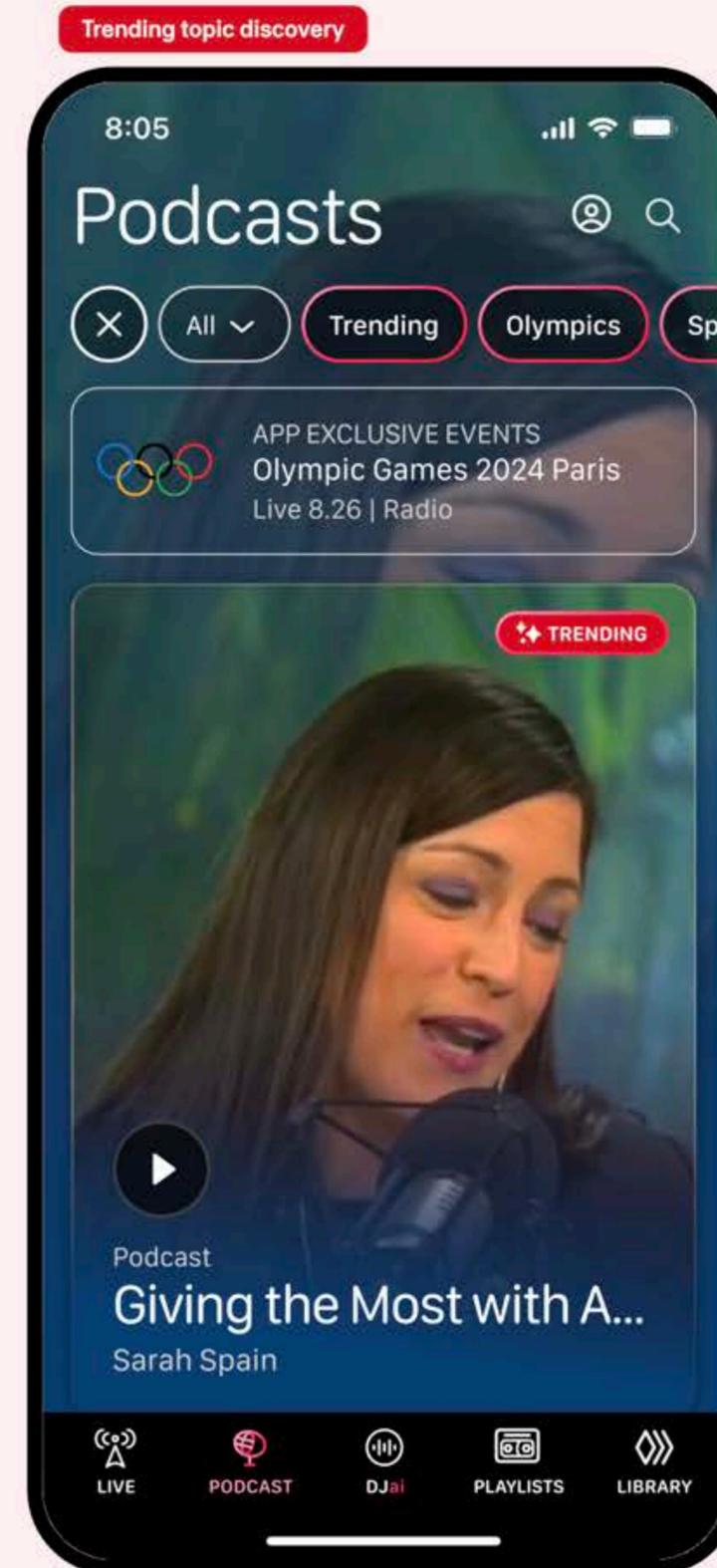
1.5x ◀◀ �II ▶▶ 💬 ⤴

Curated

While browsing the podcast home screen, Jamie discovers a trending topics section, where she can discover different podcast episodes or clips from her favorite radio show that provide different perspectives and dive into different "sides" of the topic.

Why it works

This elevates iHeart Radio's content creator's voices and demonstrates the cultural awareness of the app—boosting engagement and facilitating discovery of new content. Encouraging content discovery also fosters social shares to bring in new users.

Trending topic discovery

8:05

Podcasts

All ⌄   Trending   Olympics   Sp

APP EXCLUSIVE EVENTS
Olympic Games 2024 Paris
Live 8.26 | Radio

✦ TRENDING

Podcast
Giving the Most with A...
Sarah Spain

LIVE   PODCAST   DJai   PLAYLISTS   LIBRARY

Dialed in

With recaps, Jamie is able to access an easy-to-digest summary of the latest seasons of her followed podcasts, allowing her to revisit top episodes and explore key insights, topics covered, guests interviewed, and more.

Why it works

AI can help us analyze, extract, and generate content at scale for key iHeart Radio podcasts in order to create robust show and season recaps to further engage users and enable them to pick up where they left off.

Season recaps

8:05

Podcasts

All ∨   Recaps   Serial   Thriller

✦ MORNING

▶

Season Recap
SERIAL
Season 4

Saved by 10,000 listeners
Key Insights From Season

LIVE   PODCAST   DJai   PLAYLISTS   LIBRARY

The Impact

With the ideas proposed, we unlock new on-platform live radio and podcast listening growth opportunities, moving the iHeart Radio app into a category of its own and limiting competition with other apps.

Unlock new content capabilities with AI

Make operations more efficient and intelligent by leveraging AI to create and deliver contextual content and recommendations that deepen engagement and affinity with the iHeart shows.

Increase engagement and retention

Improve the relevancy of content recommendations and the ease of discovery, making the app feel fresh and context-aware, to increase app usage and frequency of current users.

Create new experiences to capture new users

New features offering unique ways to engage with content (e.g. community-based), creating tangible differentiators and thus distinct reasons for customers —whether off-platform listeners or net new customers —to add the iHeart Radio app to their platform mix.

The Impact

We propose focusing this first test and pilot on **utilizing AI to automate content analysis and extraction to power podcast–based recommendations.**

VIABILITY

Idols and fandoms as economic growth drivers

Unpacking fandoms, Luminate Data and Spotify found that superfans spend 80% more on music per month than the average US-based listener.

Beyond music alone, YouTube also reported that 66% of Gen Z Americans often spend more time watching content that discusses or unpacks something than the thing itself, with 8% of Gen Z describing themselves as 'professional fans' that earn money from their passions.

Luminate Data, YouTube Culture & Trend Report 2024

DESIRABILITY

Unleashing the power of AI to drive content exploration

Within our own likability research the Power of AI concept led with New Users and was second to Homescreen Widgets with Current Users.

While Dynamic Hubs ranked higher with current users, it was also described as an expected improvement, while the Power of AI was seen as more Innovative, Modern and Fun.

iHeartRadio App Opportunities Q3 2024 Wave 9

FEASIBILITY

Setting a foundation for richer engagement

iHeartRadio has a deep library of perspectives across various topics, from news and sports to the stuff we sometimes we wish we didn't know about.

With the help of AI, we can turn our transcripts into assets to broaden our partners communities and deepen engagement across our products by surfacing unexplored intersections.

Pew Research Center

Enhance the current iHeart Radio app experience by defining the interaction model required to generate, highlight and share short-form clips of top moments and integrate access to the short-form clips across three key pages: Podcast Page, Podcast Player and a new Trending Topic Page.

Success Criteria

- Develop optimized cross-page navigation between clips and full episodes

- Enable more discovery of new content through clip recommendations

- Edge cases identified and resolved in design reviews

" Ideally we would want to give users a path to the longer form content so that they can deep dive if they want to.
- Highlights/Clips Product Overview Feb 2025

" It's like you build all these features, but your user behavior is, 'I'm gonna put on a station for 8hrs and listen to it.' So how leaned-in are some of these product features?
– Jeff Cucinell, Marketing team stakeholder session

" So I'm almost less concerned about, how do we monetize them when they're going through the clips and more with making sure that the clips are driving people to the listening experience.
- Todd Goldberg

" I like the preview clips available for 20 seconds of the topic because it provides information if I will continue to watch
- Survey participant

While clips should enable discovery, they **need to drive listener retention** with long-form content consumption.

Engagement styles:
Capturing leaned-back listening, with leaned-in moments

Lean-in mechanics – Users actively engaging on their device

Lean-back mechanics – Actively listening but not engaging on their device

TL;DR
Catch up to favorites and missed episodes

⟶

Episode deep dives
Director's cut of podcast episodes or behind the scenes of favorite moments

Highlights
Collection of quick insights, takeaways or key moments

⟶

Dimensions
Contextualization of a topic or perspectives from other voices

Scan
Shortest rotational clip of what is on and available to tune into

⟶

Dialed-in
Emotive content that dynamicly keeps a vibe check

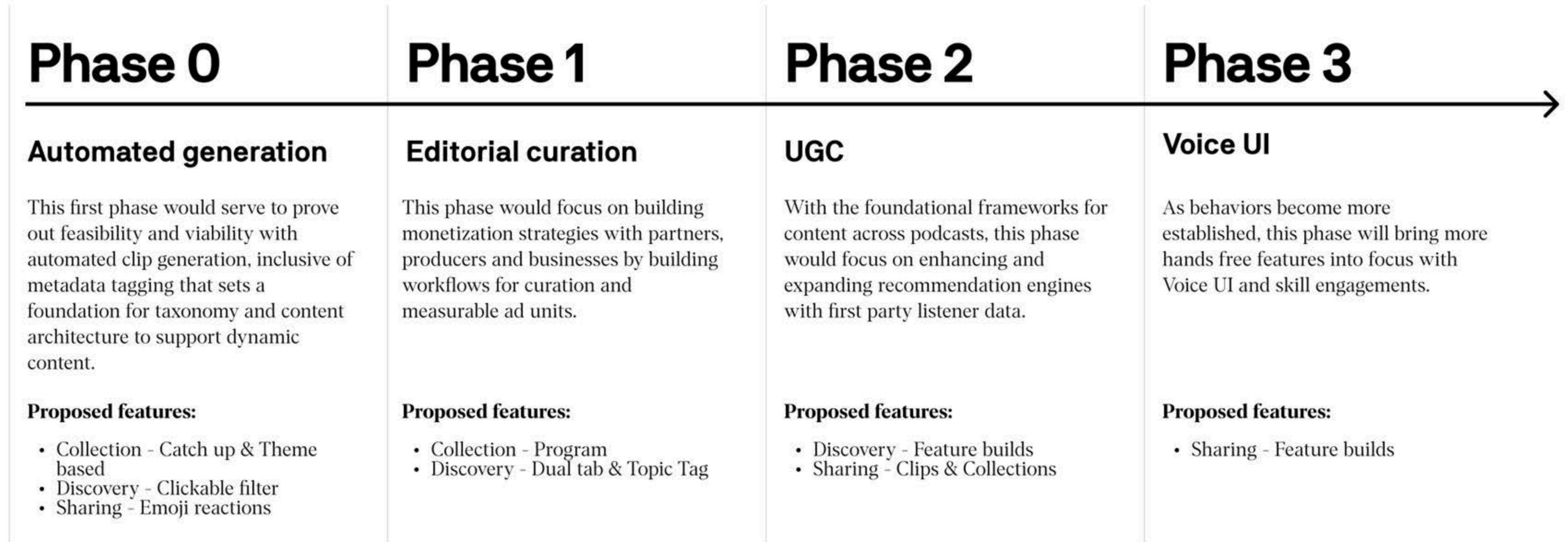# Deepen engagement by leveraging daily routines

Clips and highlights turn habitual pulse checks on culture - leveraging lean in content - into moments that sets the vibe for the day - with lean-back content.

Duration

Intervals

Feature roadmap

Phase 0

Automated generation

This first phase would serve to prove out feasibility and viability with automated clip generation, inclusive of metadata tagging that sets a foundation for taxonomy and content architecture to support dynamic content.

Proposed features:

- Collection - Catch up & Theme based
- Discovery - Clickable filter
- Sharing - Emoji reactions

Phase 1

Editorial curation

This phase would focus on building monetization strategies with partners, producers and businesses by building workflows for curation and measurable ad units.

Proposed features:

- Collection - Program
- Discovery - Dual tab & Topic Tag

Phase 2

UGC

With the foundational frameworks for content across podcasts, this phase would focus on enhancing and expanding recommendation engines with first party listener data.

Proposed features:

- Discovery - Feature builds
- Sharing - Clips & Collections

Phase 3

Voice UI

As behaviors become more established, this phase will bring more hands free features into focus with Voice UI and skill engagements.

Proposed features:

- Sharing - Feature builds

Strategic Planning

Education Client

February 2023 - April 2023

Why did we create a strategic plan?

KCAI has built a proud legacy as a leading arts and design school since our founding in 1885. While we will always honor our past, we must be responsive to the changing needs of the learners we educate, the community we serve, and the larger social and economic landscape in which we exist. This strategic plan was created to help us evolve together without losing what makes KCAI unique. It establishes our shared vision for the kind of institution we want to be in the future, and guides us on how we will achieve this vision in the coming years.

The goal of creating a plan is to document these shared commitments so that they can be a living guide for all of us who are part of the KCAI community.

Natalie Blue
Fragmented Clavicle
Bronze

AICAD schools are under pressure to be better integrated with the world outside of their walls.

KCAI & co: collective

confidential

Students feel pressured to justify to themselves and their families that an AICAD education can give them a sustainable livelihood

This is not just about connecting students to the job market, but to the art world as well

AICAD schools will need to put more emphasis on helping students understand the business of art and the opportunity for the arts in business

"I think two things would've been helpful [in art school]. One would be **an understanding of how the art world works**, which is in some respect at different levels it operates in different ways…The second thing…is **helping me develop a stronger point of view around my art practice."**

–Arts expert

"My child may have a strong interest, a strong set of skills even, a sense of talent in some creative arena. **Parents want to support that, but they have no idea what that actually means post college**, and so that's..something I think individual schools need to pay attention to in terms of **addressing the concerns of students and their support networks, parents, and families, and others."**

–Education expert

While KCAI could stand out among AICAD schools, it does not today, outside of the midwest

KCAI & co: collective

confidential

Our strong focus on craft and the uniqueness of the KC arts community could distinguish us among AICAD schools

We can play more to these strengths by lowering the wall between town and gown

We should also do more to prepare students for their lives post–KCAI

"**I don't know what the identity of Kansas City Art Institute is in terms of…what its character is compared to some of those other [AICAD schools]**. What it does is distinctive. It's certainly distinctive in our region…in the Midwest, I think it's definitely its own thing, but if I'm to compare it to other art schools, I don't know. I do think it maybe has some work to do."

–Community expert

"**What I think would be unique from [KCAI] is really a mix of just true creatives, true, serious creatives who want to live and work and be career artists and creators**…to help grow and create more of the art ecosystem, because I think there's weaknesses in our ecosystem…The other side is **creatives that want to just create community and find their place in business, and be the creative catalyst within an organization.**"

–Community expert

Pedagogy

What is unique about our teaching philosophy and approach?

Students and faculty are **mindful and active listeners**. They **learn by doing and making**, by taking control of raw materials and techniques defining their process.

There is a **scale and boldness** to what students and faculty make that does not exist at other schools. It is born from a **freedom that is encouraged here with experimental** majors, undefined by specific periods and styles of work.

Ultimately KCAI is a community of artists and makers who believe and act as **creative problem solvers**.

Program

*What is unique about our curriculum
and student/community programming?*

The KCAI community acknowledges, understand and **supports individuals as a whole person.** When you arrive at KCAI you are treated like an artist and are encouraged to take ownership of tools and process. **Teaching and learning is a deep partnership between students and faculty.**

While the small scale of classes and intimate community are deeply rooted in the *foundations* of KCAI, ideas are drawn from everywhere and bring global perspective within.

People

What is unique about our faculty, staff, students, and community partners?

KCAI builds authentic relationships by committing the small details about each other and who they are to memory. Those **memories become KCAI's great stories** and the honor the humility that everyone shares.

There is quality of **humble excellence** within the KCAI spirit, embodied in the ethos of a **continuous pursuit of learning** that happens beyond the walls of the campus.

The professionalism and scale of work that is made in KC is a reflection of how generous KCAI is with space and time. And is rooted in the expectations faculty and staff have with students.

People

What is unique about our campus and facilities, and the broader KC community in which they are embedded?
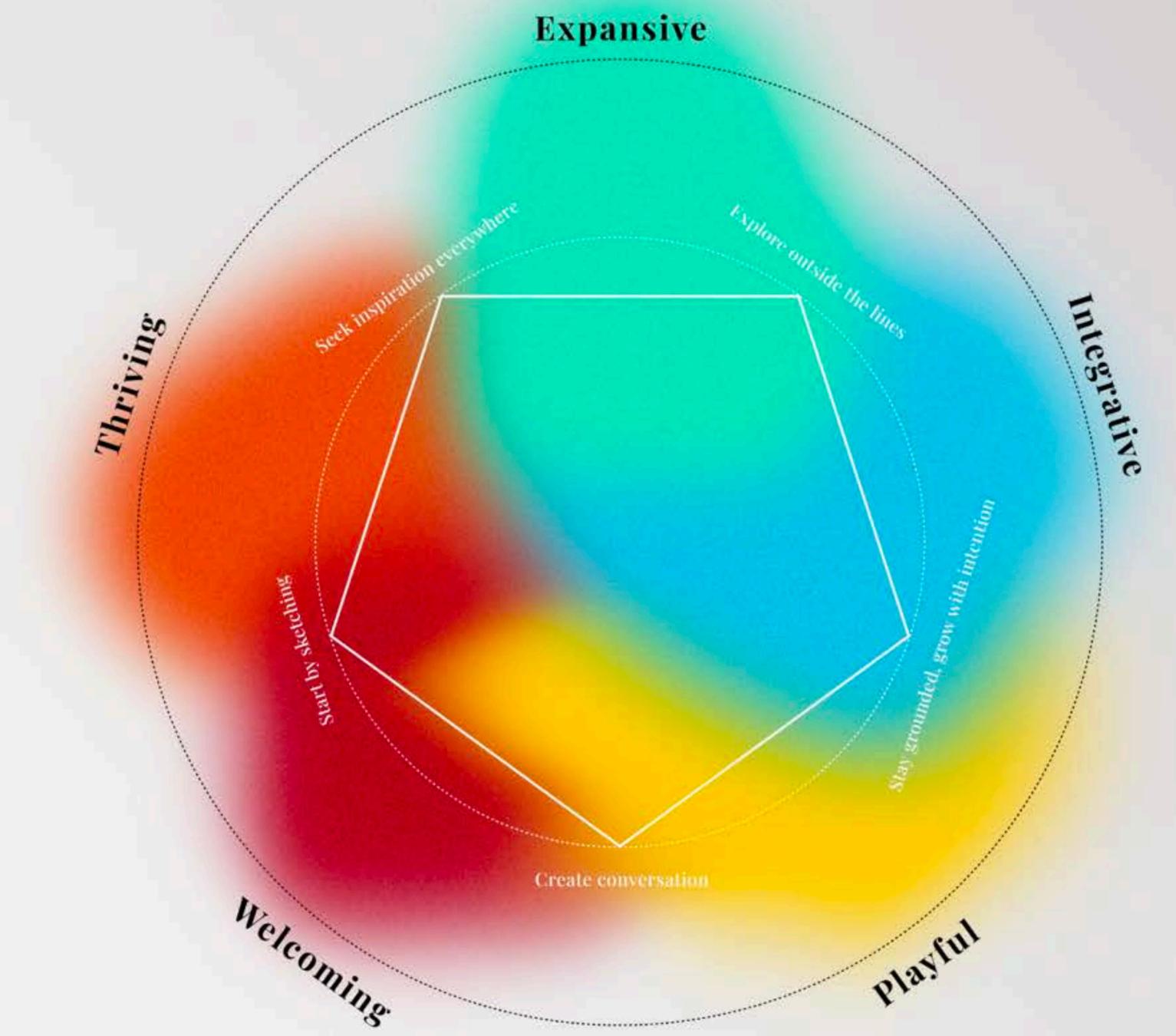
KCAI is proudly in the US. Proudly in the heartland. Proudly in KC. KCAI is not relative to another. As people join the community they are welcomed as an artist from day one and grow and change **to feel more confident and build creative confidence.**

KC is accessible and has an easiness about it in contrast to the complexity of the programs and pedagogy the arts institute enables. KCAI offers a unique balance between stimuli and quiet to develop in a safe and productive environment. **This is where artists thrive.**

Our vision

From its roots in the American midwest, Kansas City Art Institute is fostering a global community of practitioners empowered by the creative process to make their vision real, in any medium they choose.

The KCAI Prism

Expansive

Integrative

Thriving

Playful

Welcoming

Seek inspiration everywhere

Explore outside the lines

Stay grounded, grow with intention

Start by sketching

Create conversation
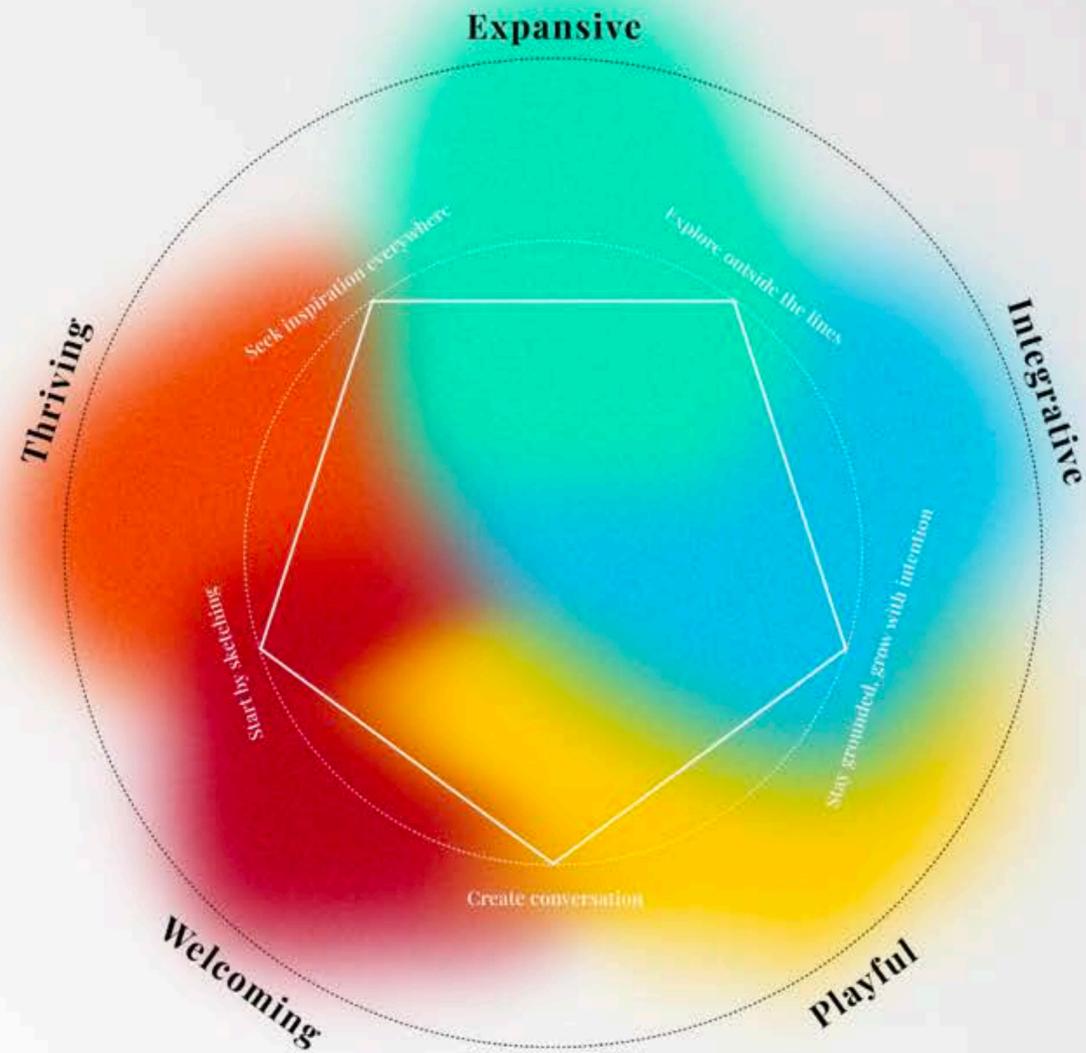
Our strategic vision narrative

Our sense of place is boundless. Situated within the heartland of our nation, the sky over Kansas City expands in all directions. It is open and vast, mirroring the rolling plains beneath it. It is here that we formed our diverse community of lifelong learning.

It is here that we cultivated an open, welcoming space for artists and designers from all walks of life to nurture their own creative vision. Here, you start your pursuit for creative confidence with acknowledgment from your peers, colleagues and mentors. Here, you find a home where you can escape the noise in order to find your own voice. Where your opportunities to explore new disciplines and experiment with different mediums is only limited by your imagination. A place where you can create at a scale as big as your ambition, supported by the artistic dynamism and resources Kansas City has to offer.

It is here that education is being radically reimagined. Founded as a Sketch Club in the American heartland, the Kansas City Art Institute has always attracted creative people seeking open spaces where they can make their mark. As we look to our future, we are taking inspiration from our past. We are building on our legacy of risk-taking and innovation to educate artists and designers who can navigate any corner of the creative economy. *From its roots in the American midwest, Kansas City Art Institute is fostering a global community of practitioners empowered by the creative process to make their vision real, in any medium they choose.*

Would this harbor of creativity inspire you to make the world you want to see? Or to be a mirror for the world to see their own realities, faults, and possibilities? Could your creative process enable Kansas City to become the model for how art and design transforms communities?

This toolkit supports strategic decision-making and problem solving

Expansive

Integrative

Thriving

Welcoming

Playful

Seek inspiration everywhere

Explore outside the lines

Start to sketching

Stay grounded, grow with intention

Create conversation

When to use it:

When you need to generate, design and develop ideas and initiatives that fulfilling our strategic priorities. This toolkit is best used when the nature of the problem you want to solve is complex and involves multiple stakeholders.

Role of the values in this toolkit:

+ Guidance for *how* to construct and implement a decision-making or design process that is in keeping with how we want to act as an institution
+ A starting point for designing specific process steps

Role of the aspirations in this toolkit:

+ Guardrails for ensuring that nothing we do works against our overarching vision
+ Sources of inspiration for developing new ideas in service of our vision

Three steps in applying the toolkit

Step 1: Decide which values apply

+ Go through each of the values and decide which ones are relevant to the problem or question at hand

+ Sketch out process steps that apply to each of the values

Step 2: Design a process

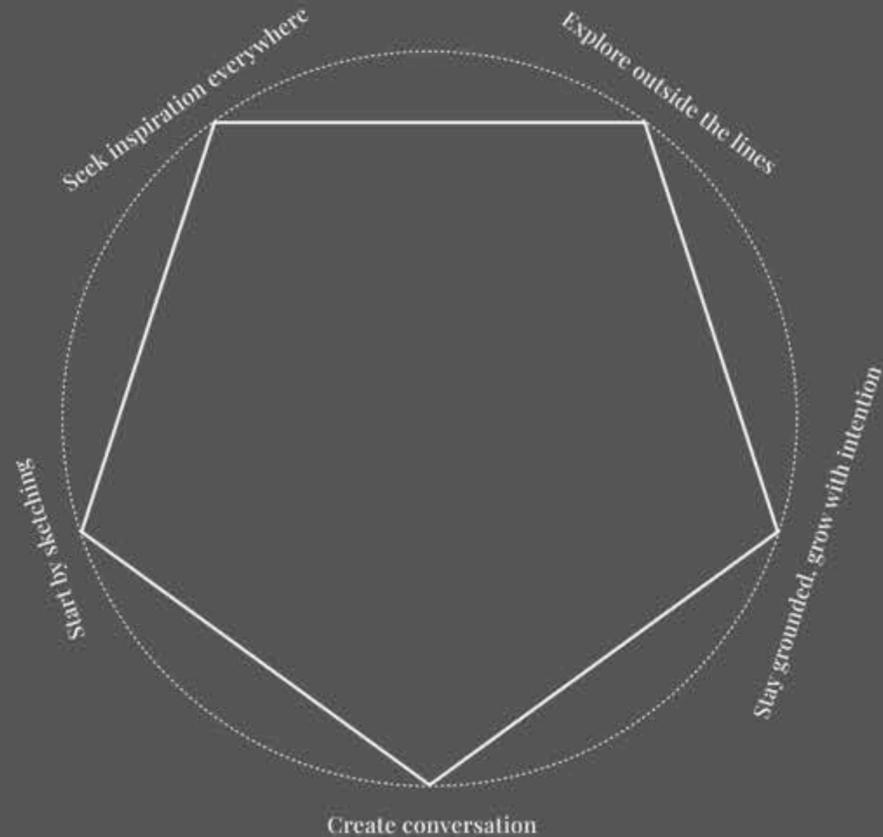+ Put the process steps in order

+ For each one, clarify:
   -Who is involved
   -What they are doing
   -What the outcome should be

Step 3: Integrate the aspiration themes

+ Define how the aspiration themes come into play in each step as:
   -A source of inspiration for ideas
   -A set of guardrails or criteria
   -A gut check on how the idea/initiative fits into the big picture of KCAI

The KCAI Prism

KCAI & co: collective

Seek inspiration everywhere

Explore outside the lines

Start by sketching

Stay grounded, grow with intention

Create conversation

confidential

The center of the prism are the values we share as an arts institute:

+ Start by sketching

+ Seek inspiration everywhere

+ Create conversation

+ Explore outside the lines

+ Stay grounded, grow with intention

These values are a reflection of Kansas City Art Institute's creative process and how the Institute acts in the world.

Start by sketching

We are nimble thinkers and doers. We believe that truly innovative work requires the confidence to roll up our sleeves and try ideas out, even if they feel messy at first. We embrace experimentation as the best way to open up new horizons of creative possibility.

Process guidance:

+ Incorporate rapid ideation and experimentation

+ Focus more on trying ideas out than getting it right the first time

Example process steps:

+ Create a core team to begin ideating solutions or initiatives together

+ Start diagramming individually, e.g. what a prototype could look like, or the key stakeholders and their relationships

Seek inspiration everywhere

We believe that artists and designers are not defined by a specific medium or title, but by a lifelong endeavor to engage with the creative process. We seek inspiration from unexpected places and people, and we welcome anyone into our community who shares our commitment.

Process guidance:

+ Get input from a wide range of people and partners

+ Look for ideas, analogies, potential solutions in unusual places

Example process steps:

+ Host a co–design session with a diverse group of people representing faculty, students, industry, etc.

+ Draw analogies from the natural world as inspiration for potential solutions

Explore outside the lines

We build resilience from our courage to work across boundaries, and sometimes break through them completely. We constantly push ourselves to break out of our own boxes, adapt to our changing environment, and take thoughtful risks.

Process guidance:

+ Create ideas and processes that are radically new or different from one another

+ Develop ideas that intentionally push the boundaries of what's possible or expected

Example process steps:

+ Develop versions of a solution in different media; a body of text, a visual diagram, an event, etc.

+ Create a high risk, high reward pilot to test in a safe, limited way

Create conversation

Creating thought-provoking ideas is not a solo effort; it is a result of the give and take between creative practitioners and the communities in which they engage. We bring a spirit of reciprocity to everything we do, so that we enrich our stakeholders as much as they enrich us.

Process guidance:

+ Get feedback and build on ideas and solutions from diverse groups of people
+ Consider how the idea could benefit all of the relevant stakeholders and incorporate these benefits into the design

Example process steps:

+ Conduct a community showcase for input
+ Conduct a stakeholder mapping exercise and develop personas to inspire stakeholder-centered solutions

Stay grounded, grow with intention

We are deeply rooted in Kansas City, but our reach is global. Being firmly connected to our own unique history and legacy enables each of us to create a lasting impact on the creative economy, however we choose to engage with it.

Process guidance:

+ Look at what KCAI has tried in the past to understand, examine, and explore what has worked in the past (or not)
+ Be explicit about what aspects of the KCAI legacy, culture, ways of working, you want to build on or break from

Example process steps:

+ Review the process and results of similar initiatives
+ Conduct a keep/stop/start exercise

The KCAI Prism

Expansive

Integrative

Thriving

Welcoming

Playful
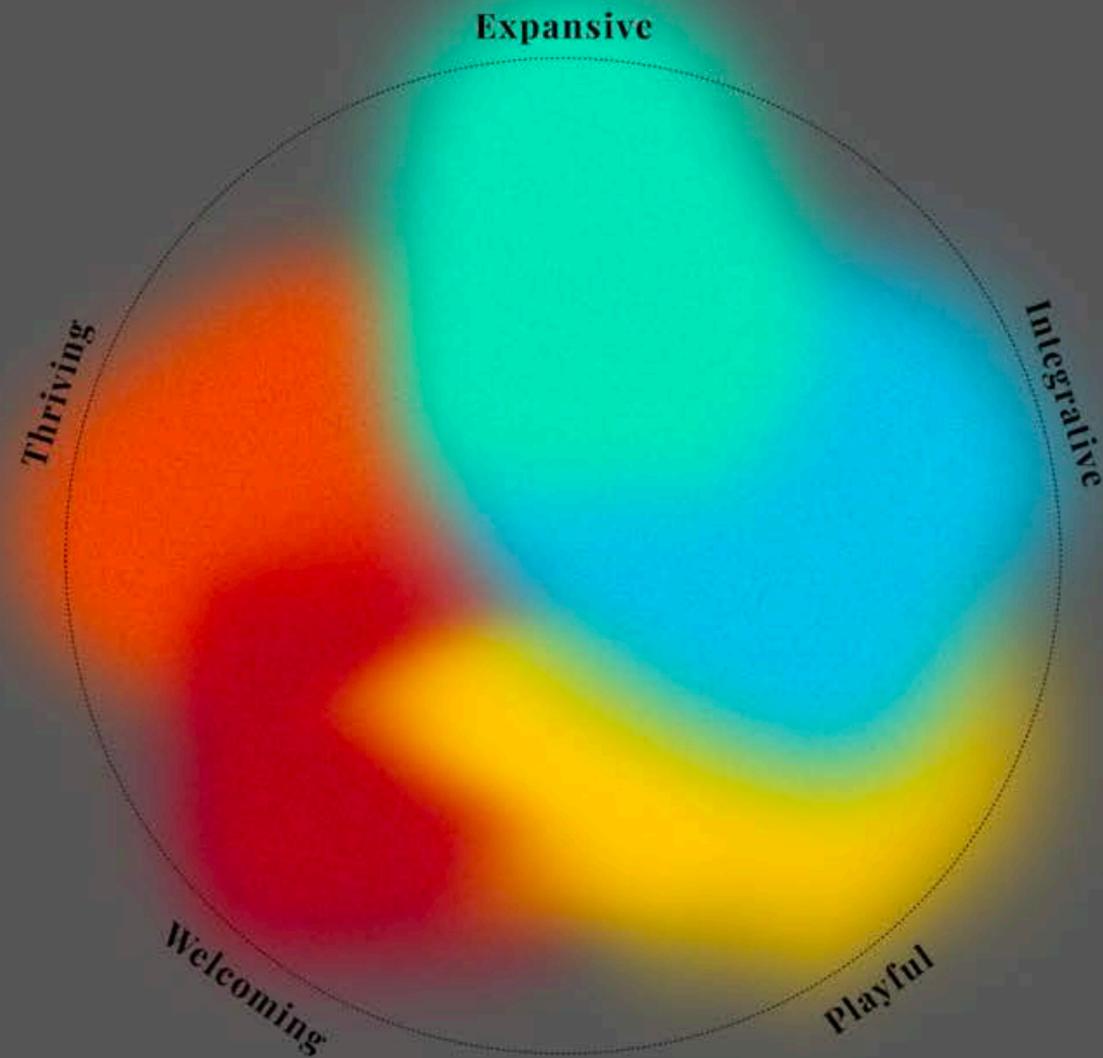
The outer rim represents the aspirations we share for the kind of art and design school we want to be in the future.

These aspirations are specific facets of the ambition we share for Kansas City Art Institute's relationship to the world.

The KCAI Prism

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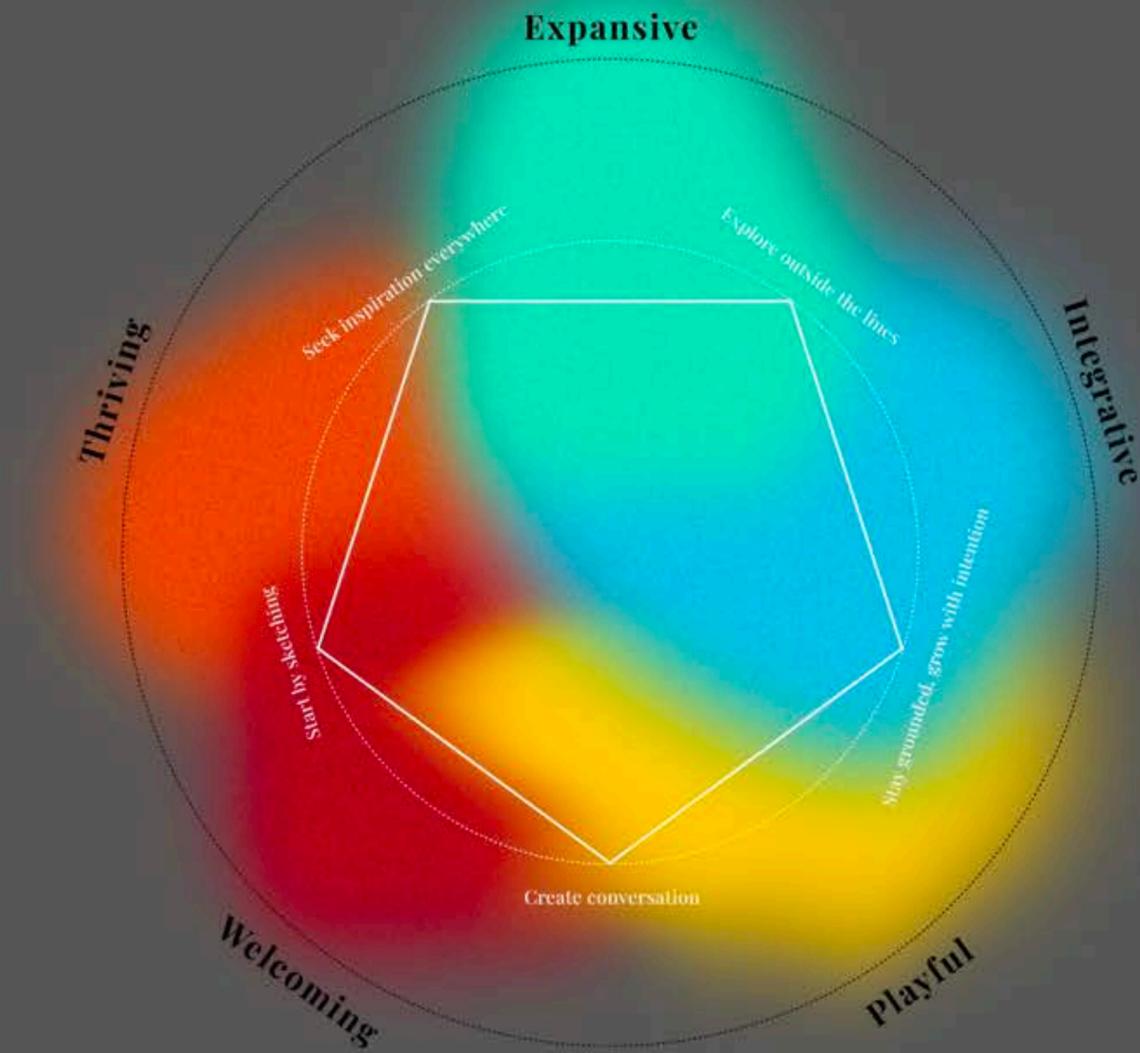
Everyone arrives at Kansas City Art Institute as a practitioner of their own creative process. And through their time here they come to realize the scale, shape or impact that process has on their immediate and in the world.

That singular ambition is abstracted into the many facets of the aspirations they hold and reflected back out in their work.

Integrate the aspirations by always asking how our ideas are driving towards our KCAI vision

KCAI & co: collective

confidential

Expansive

+ How might we build partnerships with communities that enable us to reimagine creative economies?
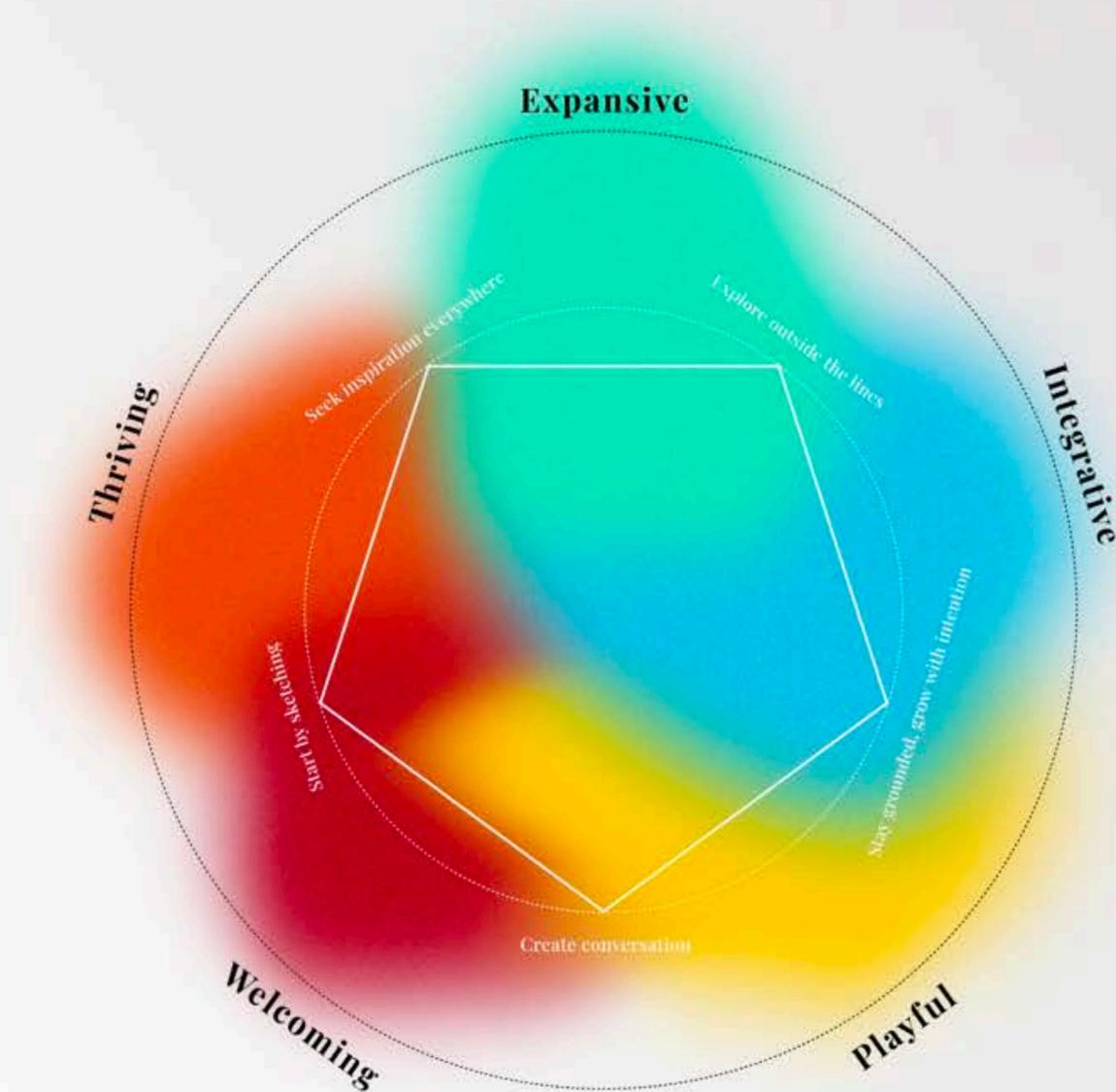
Integrative

+ How might we draw inspiration from the paths we walk everyday through exchanges with those we do not share pathways with?

Playful

+ How might we create space to nurture ambitions through safe creative chaos?

Welcoming

+ How might we foster a deepened sense of belonging as we continue to invite disparate voices into KCAI?

Thriving

+ How might we embody a spirit of reciprocity that nourishes KCAI and creative communities?

Product Design

Global Technology Client

July 2022 - February 2023

The job on a page

Define how the UGC experience on Google Maps, including Local Guides, should evolve – to grow the UGC community and contribution among the next generation of users.

Define a story and vision including a motivating reason to engage and contribute UGC on Google Maps, specifically for U24 cohorts.

Explore how the current program and product experience delivers on this vision

Provide Google teams with a set of experience tools that enable them to bring the evolved vision to life

Share a POV on how the new vision could evolve the current brand architecture of UGC contribution at Google and how it could impact next generation audience engagement strategies

Alvin Li,
Researcher,
Pinterest

"Gen Z is the most **individualistic and expressive** generation we've seen yet. They're constantly **craving new experiences to cultivate their own individuality**. They're more **motivated to discover and express who they are**."

Gabrielle, 23
Explorer
Study

"I learned about the **freedom that comes with breaking your rigidness.** I learned that my friend/s are special people who **enjoy having new experiences...**"

U24s are in a life stage of *exploration*

These are people who are into...

Moments of presence despite the demands of the digital world.

Not just exploring place, but of having a **sense of personhood**.

Not just remembering, but **reflecting.**

Not just sharing content, but **connecting** through shared interests.

Knowing the **effect of their contributions** rather than the view count.

Co-creating their identity with the help of technology.

When it comes to posting UGC about places, U24 have 5 key motivators

Connection	Influence	Remembering	Helpfulness	Authenticity
To feel connected to others, to engage with people with shared interests	To be known and followed for their content, to build a brand and make an impact	To keep track of where they've been, and plan for the future	To use their experiences to help out other people, businesses, and the platform	To express their true selves and experiences honestly and creatively

By combining Helpfulness and Authenticity, Google Maps unlocks unique value from UGC

Connection	Influence	Remembering	Helpfulness	Authenticity
Connection is a powerful UGC motivator, but as a discovery and navigation tool, connecting with others can't be our *primary* value proposition – this territory is owned by a fragmented set of connection-first social media platforms	Designing for influence would target a more narrow, instead of a broader, set of contributors – and our consumers are less interested in hearing from influencers than from peers and experts	Posting UGC in order to remember is useful, but ultimately about personal utility, and not a powerful enough motivator to facilitate meaningful exchange between users	**Elevating helpfulness taps into a core strength of Google** But leaning into helpfulness as a singular motivator may lead to an experience that feels generic or simply altruistic – asking explorers to share information that anyone could provide	**Centering authenticity can meet a core U24 explorer need** But leaning into authenticity as a singular motivator could take away from the utility of our platform, and isn't ownable in the landscape of social media competitors.

We can elevate and connect the contributor and
consumer experience by facilitating

Helpfulness

through

authenticity

We can elevate and connect the contributor and
consumer experience by delivering

Helpfulness
through
authenticity

More genuine,

because it's honest

More trusted,

because it's relatable

Easier to create,

because I just have to

be myself

More fun, because I can

express myself

Helpfulness through authenticity helps us unlock a flywheel, bringing contributors and consumers closer through the **kinship of exploration**

Kinship

Consumers inspired to contribute

Exploring their identity and the world through trying new places and experiences

Motivated to hear the perspective of other explorers like them
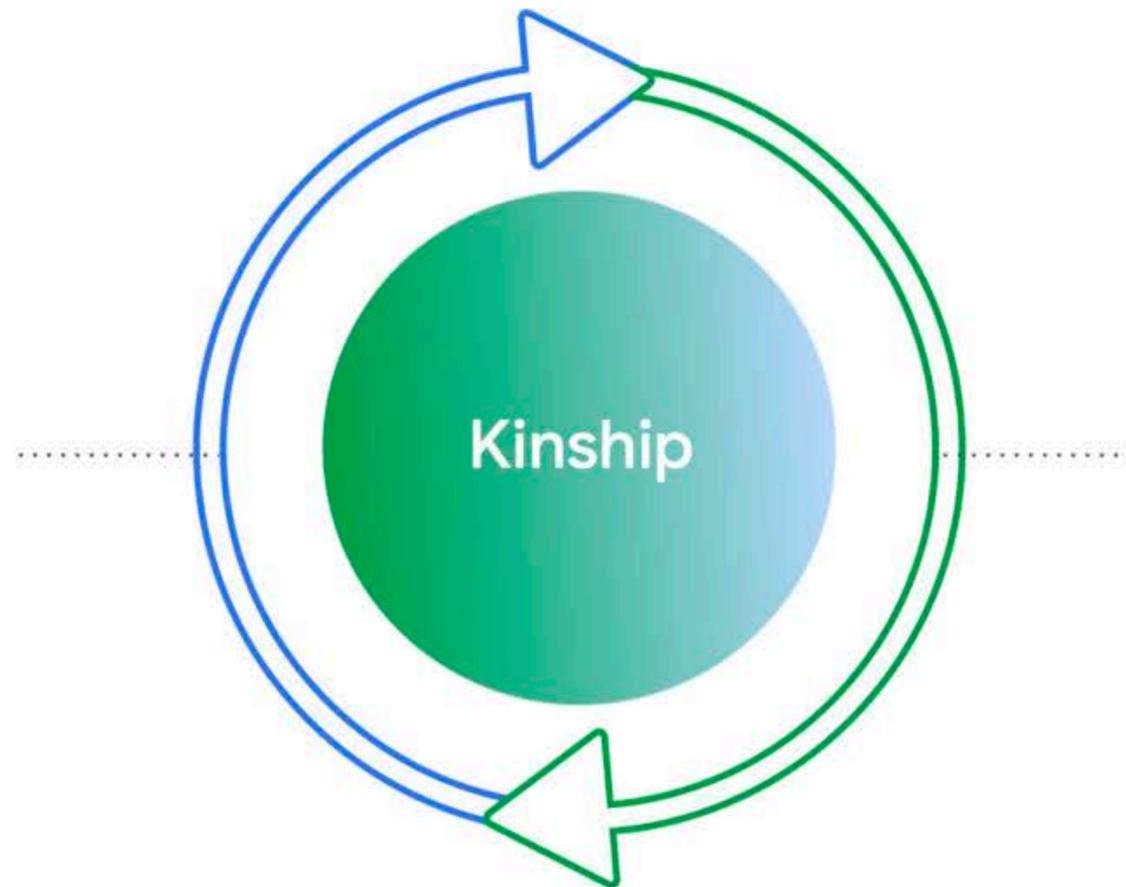
Contributors encouraged to consume

Expressing their identity through the places and experiences they've explored

Motivated to share what they've learned and help others explore

UGC Incentive Framework

These mutually reinforcing mechanisms, supported by UGC consumption and real world experiences, encourage repeated contribution, ultimately unlocking a top contributor experience where each of our incentive mechanisms is enhanced.

Real world experiences

Improved experience

Inspiration & prompts

Helpfulness through authenticity

Identity reflection

Impact affirmation
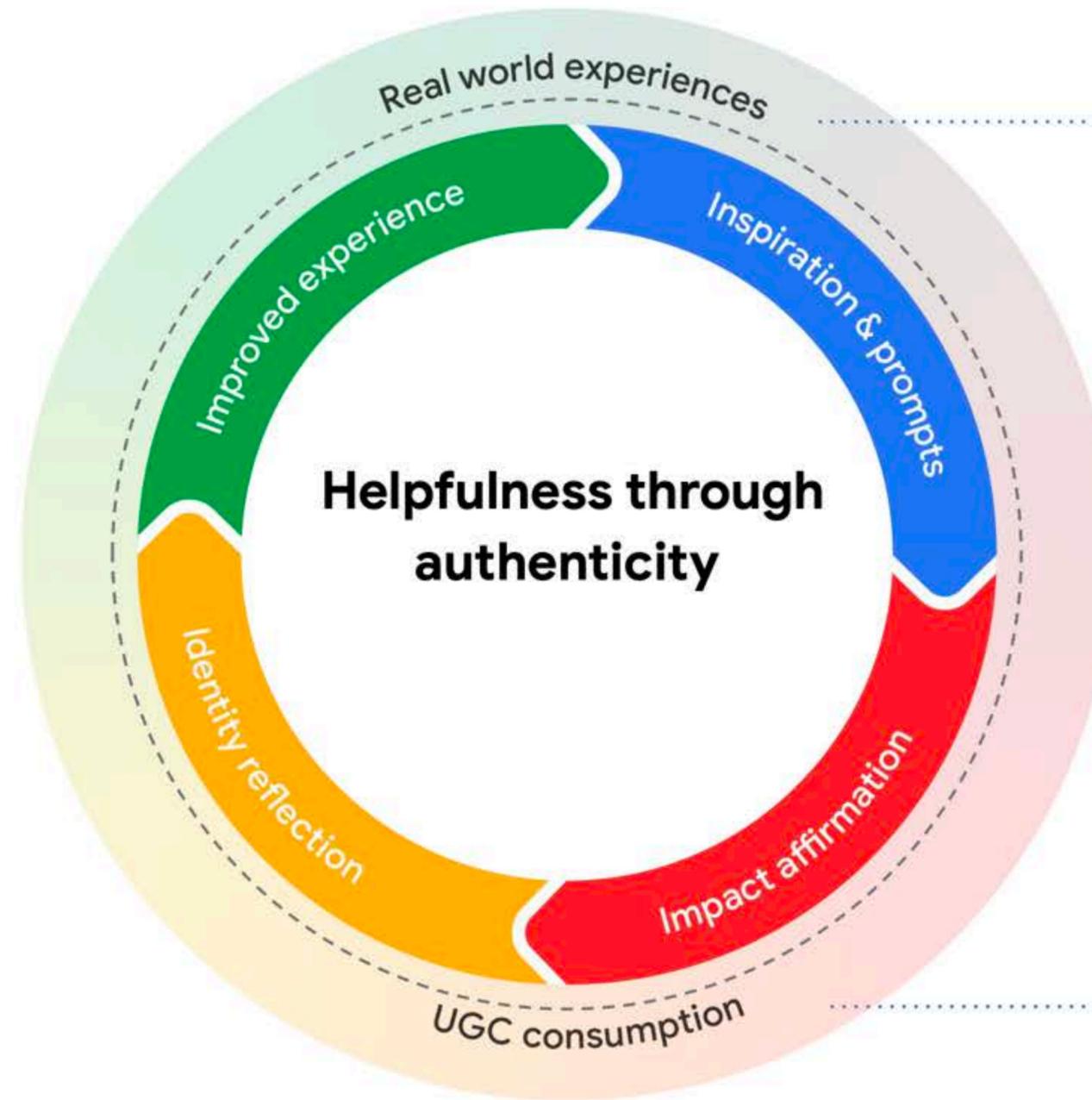
UGC consumption

Real world experiences and interactions give users something to post about.

The more our incentive mechanisms enhance users' real world experiences, the more encouraged they may feel to continue contributing.

UGC consumption is a source of inspiration and gateway into a contribution experience.

Throughout their journeys, users are seamlessly flowing between consuming and contributing UGC, **building a sense of kinship with other users**.

Inspiration and prompts

They're cued or inspired to contribute because they understand how their authentic perspective can help others.

Inspiration and prompts can be either push (inspired by to post) or pull (asked by Google to post) experiences – this will vary depending on the stage of the contributor journey, contributor segment, and strength of our flywheel.

What we do

Push:

Enhancing UGC consumption to clarify content is coming from other users, and create pathways from consuming to posting

Bringing **ease and convenience to contributing details**, e.g. through structured reviews

Lowering stakes to contributing, e.g. through personal annotations or ephemeral content

Pull:

Specific and personalized **cues and notifications for contribution**

Considerations when designing for inspiration and prompts

How might we inspire contribution as users consume other's content?

For journeys that don't begin with a prompt from Google, how might we make the contribution front-and-center when they're inspired to post?

How might we consistently communicate how their contribution might help others or help their own progression?

How might we personalize contribution prompts to help them add something that's missing or something related to their unique perspective?

How might we use ephemerality to make posting less intimidating?

Impact affirmation

As they contribute, they're reminded of the helpfulness and impact of their contribution on others

What we do

Enable and encourage users to acknowledge each others' help e.g. Helpful votes, comments, tagging, reactions, direct messaging

Measure impact through helpfulness and regularly remind users of their ongoing impact e.g. impact scorecard, impact notifications

For top contributors, track progress towards special status as they contribute

Considerations when designing for impact affirmation

How might we define and measure impact so that it encourages content that's helpful and authentic?

How might we visualize real-time and ongoing impact?

How might we inspire kinship by calling out what communities have been impacted by their content?

How might we create small moments of joy and celebration of their impact?

How might we encourage UGC consumers to personally acknowledge those that have helped them?

Identity reflection

As they contribute, they see their interests, expertise, and growth reflected back to them

What we do

Pair contributions with identity markers e.g. enduring needs, badges, profile tags

Show and reward their expertise and growth through identity-focused badges

Enable profile customization to reflect their own identity, and give users control over what gets shared (e.g. pseudonyms)

Reward top contributors with special status

Considerations when designing for identity reflection

How might we reflect their intersecting identities and interests?

How might we elevate the content from topical experts in the consumption experience?

How might we enable users to affirm each others' identities?

How might we give users more agency in how their interests get reflected?

How might we build trust over time, reflecting their identity in ways that are contextual, not creepy?

Improved experience

As users contribute, the use of the product gets better for them, ultimately sending them into new discovery experiences and high-value recognition tiers

What we do

Surfacing recommendations based on content they've contributed

Making the map reflect their interests and encourage exploration e.g. personal utility maps

Providing special privileges to top contributors e.g. early access to features, direct edits, event invitations

Considerations when designing for improved experience

How might we reflect back how their contributions influence their recommendations?

How might we enhance their experience of the real world with tools from within Google Maps?

How might we bring novelty so that our suggestions generate discovery?

How might we nourish pathways for customized individual interests?
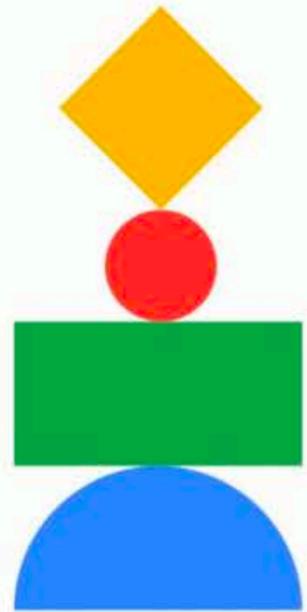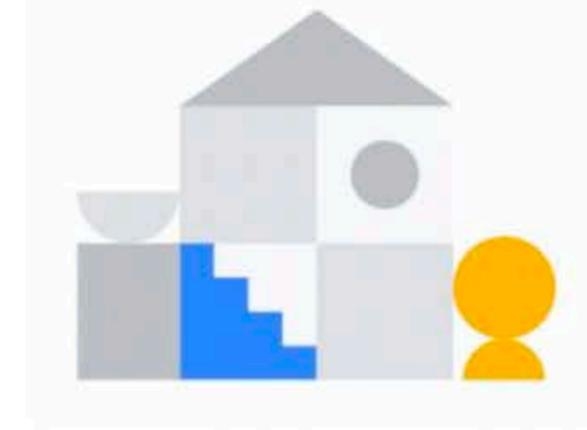
Imagine a world where engagement with maps was not only about the destination, but the journey it took you on.

And in the map created by your experiences in the real world, you had the ability to discover and build your identity so that it reflected the world you experience.

What if, Maps helped you express, share and engage with places in a way that brought people closer, so that you could explore the annotations a fellow voyager left behind and over time your map became your guidebook for exploration.

How might Maps inspire and invoke your next journey?

In the following pages are conceptual ideas that showcase how our framework could enhance the Maps experience for consumers and contributors.

Meet Luisa

She's a nurse who recently moved to Denver with her dog, Topaz. She often uses Maps to find dog-friendly coffee shops and is a self-declared pet owner on the platform.

Illustrative user journey*

How Inspiration and prompts can come to life in the consumption and contribution experience

After setting a goal to spend more time in nature, Luisa turns to Maps to explore what hikes exist nearby.

As she checks out Red Rocks Park Trailhead, **she sees a review from Lin, a Denver Hiking Expert:** "Amazing views with minimal climbing. The best Denver trail for beginners"

Luisa saves the trail to the "Want to go" list she shares with her best friend, Layla.

**UGC
CONSUMPTION**

**UGC
CONTRIBUTION**

Inspired to take a solo hike with Topaz, Luisa finishes the hike at Red Rocks Park before work.

She gets a notification from Google Maps: "Other pet owners often want to know about pet access on this trail. Help them out by sharing your experience."

Luisa opens the notification and is taken to a **structured review**, where she answers a few questions about pet access and trail safety. In the review, she adds a note "great for a first time solo hiker".

* Any net-new features in this user journey are for illustrative purposes. Detailed product priorities to come.

Illustrative user journey*

How Impact affirmation can come to life in the
consumption and contribution experience

Inspired by her hike, Luisa wants to acknowledge Lin's help. She
writes a comment on his review to thank him and **follows his
profile for more hiking inspiration.**

**UGC
CONSUMPTION**

**UGC
CONTRIBUTION**

3 days after her hike, Luisa gets an **impact notification:** "21
hikers found your review helpful! Keep it up!"

She also receives a **comment** from another hiker, thanking
her for her review of Red Rocks Park. "I'm a bit nervous to
hike alone, and your review gave me the confidence that i
could do it without fear on this trail. Thank you!"

* Any net-new features in this user journey are for illustrative purposes.
Detailed product priorities to come.

Illustrative user journey*

How Identity reflection can come to life in the consumption and contribution experience

As she's planning a trip to Joshua Tree with Layla, she begins researching the best coffee shops in the area. In her Explore feed, a post about a barista-owned coffee shop next to the national park catches her attention. She **clicks on the profile of Priyanka**, the top contributor with a Global Coffee Expert badge who posted it.

She finds Priyanka's hit list "The best coworking coffee shops in the world" and **saves it for future travel inspiration.**

The next time she opens Maps, her Explore feeds suggests a few fellow Denver coffee lovers to follow. She browses their profiles, and even chimes in on a debate about the most dog-friendly coffee shop in Denver.

UGC CONSUMPTION

UGC CONTRIBUTION

Luisa sees that she only needs 2 more actions to **unlock the Denver Hiking Novice badge.**

Maps reminds her of a hike she's saved on her "Want to go" list to try next. On her next hike, she remembers to take a few pictures to upload and progress towards her badge.

In app, she sees another notification: You've been saving coffee shops to your "want to go" list. Would you like to add Coffee Lover to your profile?" Luisa agrees and adds a "Coffee Lover" **tag to her profile.**

* Any net-new features in this user journey are for illustrative purposes. Detailed product priorities to come.

Illustrative user journey*

How Improved experience can come to life in the consumption and contribution experience

UGC CONSUMPTION

Luisa tries a new hike before work at Waterton Canyon. She receives a **recommendation** from Google: "People often stop at Sunshine Coffee after going to Waterton Canyon. Do you want to add it to your route?"

A month later, Luisa and Layla take their vacation in Joshua Tree. When she opens Maps to navigate to the hotel, the best hikes and coffee shops recommended by locals show up on the Map, including suggestions from the local hiker and coffee lover communities in her Explore feed.

UGC CONTRIBUTION

She checks out Sunshine Coffee and adds an annotation of the dish she liked here for future reference.

* Any net-new features in this user journey are for illustrative purposes. Detailed product priorities to come.

Organizational Design & Activation

Non-profit Client

June 2021 - October 2021

The National Gallery is in a defining moment.

Where we renew our commitment to being a living institution.

"The people of this country know ...that art is not a treasure in the past or an importation from another land, but part of the present life of all the living and creating peoples—all who make and build." **President Franklin D. Roosevelt**

Our strategic plan sets a clear mandate for what we hope to achieve.

Mission

The National Gallery of Art serves the nation by welcoming all people to explore and experience art, creativity, and our shared humanity.

Vision

Of the nation and for all the people.

Values

- Integrity
- Diversity Equity Access & Inclusion
- Excellence
- Deepening Public Understanding
- Curiosity & Continuous Learning
- Empathy & Generosity of Spirit
- Agility & Responsiveness

Priorities

- Reflect and attract the nation
- Become the nation's primary resource for art and creativity
- Provide a visitor-focused experience
- Operate a sustainable and equitable museum

How might our expressions enable our strategic plan, and better serve the public?

We'll all have a part to play in delivering on our role, voice, and experience principles.

Strategic Plan

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Strategic Priorities
- Reflect and attract the nation
- Become the nation's primary resource for art and creativity
- Provide a visitor-focused experience
- Operate a sustainable and equitable museum

What the public needs from us...

Our Role

Shapes how we...

Look (Visual Identity System)

Sound (Voice)

Act (Experience Principles)

Guiding Insights

We're open to all, but our experience is too open-ended.

Visitors tend to default to a linear path, leading to behaviors that exhaust rather than enrich.

Visitors need priming that helps them see, guides the way, and gives each visit a sense of purpose and completion.

Just because we're open doesn't mean we're hospitable.

We're indisputably iconic, but the public wants us to push against our natural formality. We inspire reverence, but our formal setting is alienating to those who don't feel it's "for them."

Visitors crave more levity, a sense of surprise, and a feeling that "coming as you are" is enough.

We're defined by silence, but the public sees art as a fertile ground for conversation.

The public knows art has the power to bridge divides, spark dialogue, and unlock creativity—things that are sorely needed.

Visitors expect us to not just preserve and interpret our collection, but also use it to provoke conversation.

Through our research, we also identified five visitor types* distinct to The National Gallery.

*Inputs to these visitor types: John Falk's Museum Visitor Types, BVA visitor research, Redscout primary research.

The Maximizer

Seeking the sublime, iconic and pre-eminent—skipping 'deep cuts' in favor of 'chart toppers' that capture the best a place, movement, medium or artist has to offer.

Motivators
- FOMO
- Bucket-list experiences

Delighters
- The thrill of the 'best of the best'
- Little-known facts about well-known works

Frustrators
- Prohibitive rules
- No context or guidance

The majority of the visiting public approach museums like ours with a Maximizer mindset.

50% of recent visitors fall into this persona, according to an August 2021 exit survey.

The Omnivore

Seeking timely, fleeting, and once-in-a-lifetime experiences that keep them on the edge of culture.

Motivators
- Feeling "cultured"
- Social currency

Delighters
- Feeling represented; being seen
- Special events
- Interactive & multi-sensory

Frustrators
- Permanent collections; no urgency
- Being late to the party

Omnivores are most likely to skip the National Gallery.

They believe us to be unchanging and permanent collection-led, making a visit less urgent than to more fleeting or bleeding-edge institutions.

The Educator

Seeking to share powerful lessons about the world around them. Not necessarily professional teachers.

Motivators
- Giving others a formative experience
- Exploring human history

Delighters
- Participation & interaction
- Celebration of diverse thought
- Connection to local community

Frustrators
- Not enough pre-visit priming

The Enthusiast

Seeking solace. Art enriches and humbles as it transports them from their everyday.

Motivators
- Meditation & decompression
- Feeling humbled and awed
- Comfort; home away from home

Delighters
- Intimate tours by expert voices
- Spaces to pause, recharge, reset
- Connection with fellow enthusiasts

Frustrators
- Elitism
- Didactic instruction

Many National & Circle Members fall into this type.

This suggests that, of all the visitor types, today's experience most resonates with The Enthusiast; we're best at serving them today.

The Practitioner

Seeking reference points, new inspirations, and lessons about craft to color their own creative practice.

Motivators
- Exploring acts of creativity
- Seeking inspiration for their work
- Getting out of their own head

Delighters
- Learning from the masters
- Eye-opening exhibitions
- Origin and creation stories

Frustrators
- Prescriptive interpretation

Our Role

Host conversation between art and the public.

Visitors' experience of us is often one of reverent silence. But there's much to discuss. The public is hungry for us to create space for more than just looking. They're craving dialogue. They want a way to listen to the works more closely. To converse with the works, and with each other.

Because art has limitless potential to start new conversations and give existing ones new energy. It can bridge divides and open our eyes to perspectives unlike our own. It can spark creativity, if only you engage actively.

To become the nation's primary resource for art and creativity, it's our responsibility to host this conversation at a national scale.

Our voice and our experience will work together to create this conversation.

Our voice and experience will work together to create this conversation—which will shift public perception:

From:

Institutional
Top-Down
Reserved
Selective

To:

Inspirational
Two-way
Open
Inclusive

To 'host' conversation is to think of our offering to the public as one of hospitality. How does that inform how we sound and act?

Strategic Plan

Mission
The National Gallery of Art serves the nation by welcoming all people to explore and experience art, creativity, and our shared humanity.

Vision
Of the national and for all the people.

Values
- Integrity
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- Excellence
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- Curiosity & Continuous Learning
- Empathy & Generosity of Spirit
- Agility & Responsiveness

Strategic Priorities
- Reflect and attract the nation
- Become the nation's primary resource for art and creativity
- Provide a visitor-focused experience
- Operate a sustainable and equitable museum

What the public needs from us... ⟶

Our Role

Host conversation between art and the public.

Shapes how we...

Look (Visual Identity System)

Sound (Voice)

Act (Experience Principles)

Our Voice

The **Curious Host**

Our voice is **inspired by inquisitive interviewers** who host podcasts and radio shows. Like them, we **create space** for conversation, and **invite you** into it. **Keen observers**, we cast subjects in an intimate light —encouraging them to **open up** and **asking them questions** everyone has, and the ones they hadn't thought to ask. Our conversations lead to **vivid stories and shared curiosity.**

This **ignites interest, knowledge, and passion** in our audience— leaving them thinking and caring about something new.

Unpacking Our Personality

We are:

Conversational

We are skilled with small talk and big topics.
We believe in a back-and-forth, not a one-way
performance or lecture.

But not:

Theatrical

We host, we don't put on a show. It should
never feel like we're consciously attempting to
impress or entertain our audiences.

Unpacking Our Personality

We are:

Tuned-in

This comes through in the way we treat people and how we speak to the art— attentive to the unique, often unseen, details.

But not:

Disruptive

Everyone's experience with art is beautifully different. We don't get in their way or demand their attention. We let things unfold naturally.

Unpacking Our Personality

We are:

Inquisitive

Our curiosity is always in service of others' understanding. Using this lens ensures that we never sound too pushy or nosy.

But not:

Provocative

We're happy to engage debates, but we're not aiming to start them. Think of it as provoking thought, not provoking people.

Unpacking Our Personality

We are:

Suggestive

By using our knowledge to surprise and inspire others' thinking and creativity, we allow for learning rather than dictate it.

But not:

Didactic

An overly academic tone can make it seem like we only welcome other experts. We never want to assume any level of skill or knowledge.

When we embody the Curious Host, we...

Connect with guests

We're constantly inviting and encouraging participation by fostering conversation. Our goal is to create space for others to engage, connect, and be inspired.

Share the relevance

We can help cast new light on things and frame them in the context of the moment. We love to reveal the hidden and unexpected connections.

Bring them into the story

Like a storyteller, we find and share the most interesting points that make an experience even more vivid—sort of like painting a picture with words.

Messaging Themes

Our vision drives the stories we tell.

And we have no shortage of them. The entire canon of art history—artists, genres, periods, countries, controversies, and subjects of all sorts make for rich and endless stories.

To connect them all, we've identified the themes that help us reinforce and manifest our vision. Themes give us talking points to inform *what we say* and *what we write*. Should we weigh in on that topic? What point do we want to land in our publications? What stories can we tell today vs. tomorrow?

Themes can connect and inspire all of our conversations— everywhere. And help us author our own story.

- Used to architect talking points and structure

- Helps us establish a cohesive story and point-of-view

- Frames all new stories and informs content calendars

Of the nation. For all the people.

Of the nation

This part of our vision influences our topical content.

Typically we'll hit upon these themes in channels like publishing and experiential storytelling where we're constantly refreshing our content.

We may be inspired to talk about:
- Issues of national interest and importance
- New conversations in the landscape of creativity
- How art connects to cultural shifts and trends
- The significance of specific places and times in art
- Places, people, and events around our nation's capital
- Events happening around the globe

For all the people

This second half influences our evergreen content.

These themes are rooted in our shared humanity. They permeate communications and branding and help us ensure that even targeted messaging is inclusive.

We may be inspired to talk about:
- Our original purpose and how we're fulfilling it
- The unique ways people experience art and creativity
- Enduring human truths and fresh social observations
- Where and how art appreciation fits in to modern life
- Our curators and Fellows as "personalities"
- Underrepresented and unexpected artist perspectives

Our **Experience**

Our Experience Principles are used to inspire and evaluate experiences that we offer the public in every moment, on campus and off.

They ensure that every engagement we offer delivers on:
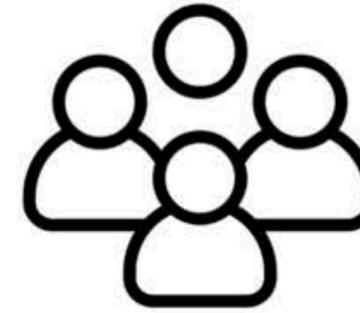
Visitor Needs + **Strategic Priorities**

Our Experience Principles are useful to all who design for and engage with the public.

Designing & Evaluating Experiences

Teams behind public-facing programming, such as:
- Visitor Experience & Evaluation
- Digital
- Architecture & Design
- Development & Membership
- Education
- Events

Delivering Experiences

Public-facing staff, such as:
- Lecturers & Docents
- Visitor Experience Volunteers
- Protection Services
- Catering & Retail

Each Experience Principle is expressed in the voice of our visitors.

1. Show me **where to start.**

2. Leave space for **my instincts.**

3. Invite me into **the conversation.**

4. Help me **connect the dots.**

5. Reward my **curiosity.**

1.
Show me **where to start.**

We offer visitors starting points, helping them with what to see first, how to begin looking at a work, and how to start a conversation about it.

The Impact

By focusing on starting points, we give visitors permission to not see it all, and orient them at every turn along the way.

The Need

For many, art and art museums aren't comfortable or familiar. With a million possibilities for what to see and what to take away, visiting can be daunting. Too many visitors try to skim everything in order, exhausting themselves in the process.

2.
Leave space for **my instincts.**

We honor what visitors feel in their gut, and what works mean to them. Because what a work means to you is as important as its broader cultural significance.

The Impact

By honoring what visitors feel, we elevate and validate personal meaning, celebrate one's thought process from first impression to deeper understand, and encourage visitors to trust themselves.

The Need

Art is personal. It might send you messages others don't receive. But a sense that critics and scholars know best can stop new visitors from trusting themselves and drawing their own conclusions.

3.
Invite me into **the conversation.**

We invite visitors into dialog with the work and each other—inviting asynchronous questions, responses, and reactions.

The Impact

We send a message to the public that our collection is up for debate and that we are a critical gathering place for the exchange of ideas—making visitors feel like contributors, critics, and co-creators.

The Need

For so many visitors, a trip to the National Gallery inspires reverent silence. It's quiet...maybe too quiet. Because there's much to discuss. The public wants to engage with the work, and with each other, actively.

4.
Help me **connect the dots.**

We activate the latent connections within and between works. We aim to help visitors discover the influence works have on one another, and on the world— putting them into their fullest context.

The Impact

Creates room for interesting juxtaposition, arms visitors with layers of information, and fosters broader understanding of the world.

The Need

To walk through the galleries, in order, with minimal interpretation, is to miss a world of hidden connections that surround each work. Subjects recur. Artists spar. Influences leap between periods and places. Layers of story surround the work: who made it? What was happening in the world when it was made? Why is the subject significant?

5.
Reward my **curiosity.**

We open doors, reveal rabbit holes, and create personal experiences that unlock deeper engagement. One thing should lead to another.

The Impact

Encourages depth and momentum rather than a shallow skim. Invites us to delight visitors with moments that feel surprising and spontaneous. Sends a message that an open mind is most important.

The Need

Traditional art institutions reward knowledge: the more you know coming in, the more you'll get out of it. Visitors need us to turn that tradition on its head.

Our **Voice & Experience**
Activation Planning

Defining these things gives way to transformational work to come.

Strategic Plan

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Strategic Priorities
- Reflect and attract the nation
- Become the nation's primary resource for art and creativity
- Provide a visitor-focused experience
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What the public needs from us...

Our Role

Host conversation between art and the public.

Shapes how we...

Look (Visual Identity System)

Sound (Voice)
The Curious Host

Act (Experience Principles)
Show me where to start.
Leave space for my instincts.
Invite me into the conversation.
Help me connect the dots.
Reward my curiosity.

Our new role, voice, and experience principles will change how we work, and shape what we focus on next.

There are two kinds of change to embrace:

Embedding this work in our teams and their processes.

How can we put it to use in the context of our daily work?

Sparking new initiatives that accelerate impact.

How might we prioritize the work that will solve real challenges?

Embedding this work in our teams and their processes.

How can we put it to use in the context of our daily work?

1

Roll-Out to Key Teams

Prioritize teams responsible for directly implementing this work day-to-day. Hold roll-out sessions to build awareness, excitement, and intuition around the new voice and experience principles.

In Progress
Redscout-hosted Team Roll-Out Sessions are already underway, and will share the final run-of-show and materials for moderation additional ones, where appropriate. See following page for a list of the employees who have already attended Roll-Out Sessions.

2

Rethink Briefing & Evaluation Processes

Once responsible teams are onboarded to the work, they should build the role, voice, and experience principles into their processes for initiating projects and reviewing / critiquing work.

3

Identify Opportunities to Experiment

To evolve sustainably, teams should start by identifying a few projects where they can implement the new voice and experience principles in full. Use this as a testing ground for the new briefing and evaluation process, and as opportunity to build new muscle memory.

4

Create Recurring Critiques

Design regular critique sessions within or across teams—bi-weekly within teams or monthly across teams is ideal. Team members should bring live work for open, constructive critique by the group—up to three rounds of critique per session.

A practice of regular, constructive workshopping allows everyone to better internalize and verbalize what the role, voice, and experience principles look like when successful.

5

Org-Wide Roll-Out

Give all who work at the National Gallery visibility into this work.

By making all aware of our role, voice, experience principles, and visitor types we create a new shared language and mutual accountability while eliminating the risk of conflicting frameworks.

6

Front-Line Onboardings

A special follow-up to the ORG-WIDE ROLL-OUT, with learning modules focused on how we'll speak and act differently in visitor-facing moments, and with a glimpse at the projects to come that will further shape the visitor experience.

Sparking new initiatives that accelerate impact.

How might we prioritize the work that will solve real challenges?

The core project team has identified three priority areas for future work. Each of these areas were chosen for their urgency, and their ability to activate the voice and experience principles.

Wayfinding

Offering visitors an easier and more engaging path through the Gallery.

Key Initiatives:
- Unified Signage Program
- Visitor Orientation & Welcome Program
- Route Pathing Program

Interpretation

Building on, and re-thinking, the layers of information about what's on view.

Key Initiative:
- Unified Interpretation Program

Relationships

Cultivating durable loyalty with a broader public—locally and nationally.

Key Initiative:
- CRM Strategy

SUGGESTED ROADMAP

MONTH												
0	2	4	6	8	10	12	14	16	18	20	22	24

PROPOSED DATES

10/21	12/21	2/22	4/22	6/22	8/22	10/22	12/22	2/23	4/23	6/23	8/23	10/23

EMBEDDING THIS WORK

- ROLL-OUT TO KEY TEAMS
- RETHINK BRIEFING & EVALUATION PROCESSES
- IDENTIFY OPPORTUNITIES TO EXPERIMENT
- CREATE RECURRING CRITIQUES
- ORG-WIDE ROLL-OUT
- FRONT-LINE ONBOARDINGS

SPARKING NEW INITIATIVES

WAYFINDING

- UNIFIED SIGNAGE PROGRAM — ONGOING IMPLEMENTATION
- VISITOR ORIENTATION & WELCOME PROGRAM — ONGOING LISTENING & EVALUATION
- ROUTE PATHING PROGRAM — ONGOING ROUTES PROGRAM

INTERPRETATION

- UNIFIED INTERPRETATION PROGRAM — ONGOING OVERHAUL & ROLL-OUT

RELATIONSHIPS

- CRM PROGRAM — ONGOING LOYALTY PROGRAM + COMMUNITY ENGAGEMENT

LAUNCH: OPEN YOUR EYES ★   ★ LAUNCH: EXCHANGE POINTS OF VIEW; MAKE BOOKMARKS, FIND RABBIT HOLES

System Design & Build

Global Technology Client

April 2020 - January 2021

Context

Business

Early customer lock-in is essential for ensuring lifelong brand loyalty for smartphones and driving revenue growth. In order to make progress towards this key metric, Samsung developed and piloted <u>My First Smartphone</u>.

The program was intended to strengthen brand preference among Gen Z and Alpha by focusing on key moments between parents and children.

Tweens (10-13+) Audience Profile (US)


Who are they?

Digital natives, they are the first generation to be introduced to wireless devices, which precedes their first phone. Influenced by their family and peers this group seeks to galvanize around digital experiences, and bring them to the real world.

They are just starting to discover who they are and waffle between between childlike tendencies and teen behaviors. Tweens also struggle to balance a desire to standing out or be accepted into a social network.

Unlike previous generations, this young Gen Z cohort privileges inclusive activities over exclusivity. They grew up with increasing degrees of authentic representation and want to celebrate it. This inclusion is not only limited to diversity, this group is also highly attuned to a growing socio-economic divide.

Cellphone Ownership
(Market Penetration)
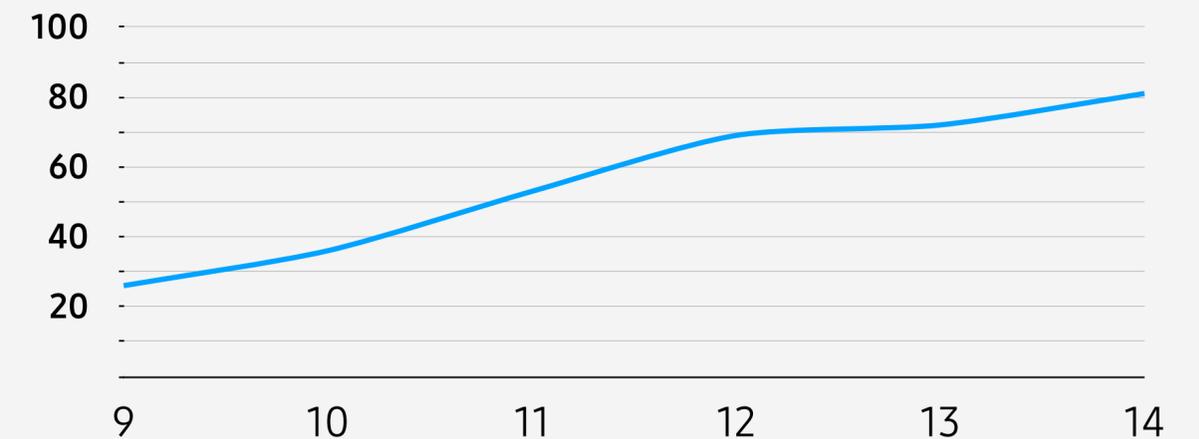
Lifestage Considerations

- **Mastering Abstract Thinking**
  Starting to develop logical thought, deductive reasoning abilities, and improved memory and executive function skills.

- **Egocentric Behaviors**
  A root cause of the development of self-consciousness, egocentricism, at this age, also fuels a sense invincibility.

- **Discovering Personal Talents**
  Test limits and push against boundaries to learn about topic of interest and master skills.

- **Friends First, Family Second**
  Friendships become more complex and more important at this age, while they grow increasingly independent from family and seek more privacy.

Rules of Engagement

- **Generation Video**
  This generation grew up on video content with Netflix and Youtube and are all too familiar with digital video mechanics.

- **Limited Attention Spans**
  With nearly endless content to choose from this cohort has an even shorter attention span that previous generations.

- **Creation Expression ≠ Creative Pursuit**
  This cohort is eager to meld media, tools and platforms to express themselves and share with others; but rarely uses online tools to master creative skills.

- **Technology Fatigue**
  While this generation is "digitally native" they still require and desire human interactions.

YouTube 53%
Netflix 27%
YouTube Kids 7%
Prime Video 3%
Hulu 2%

Proprietary and confidential
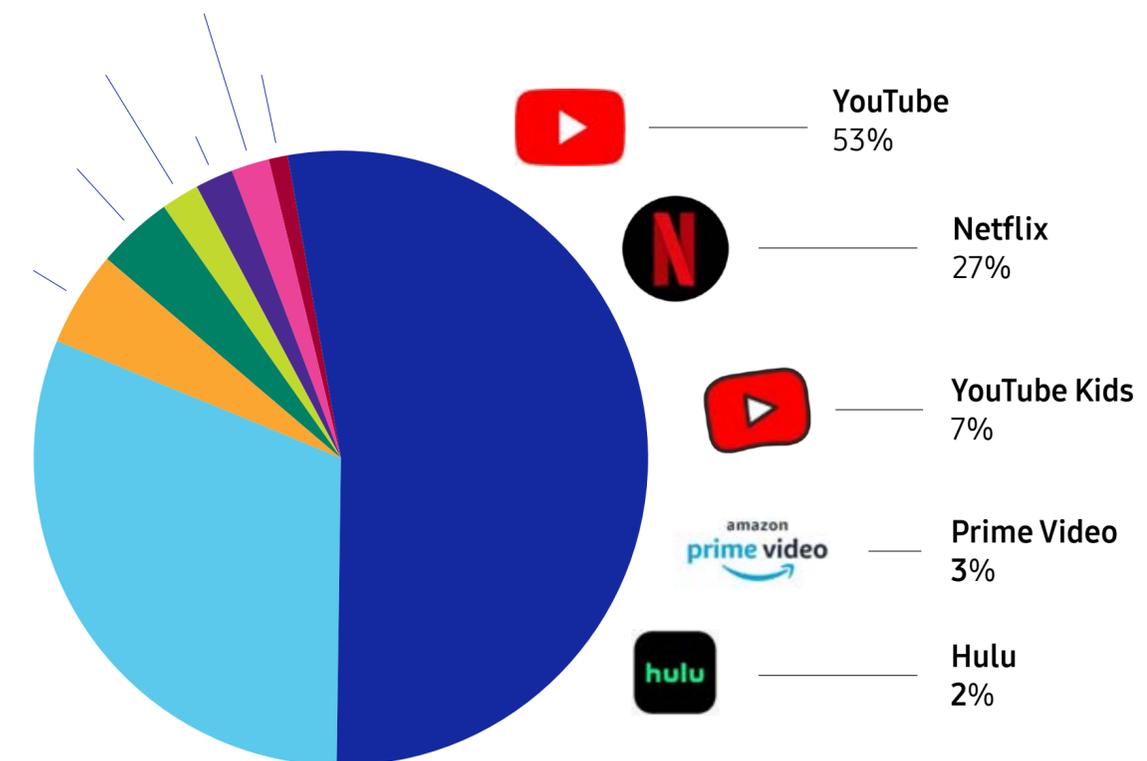
Parents (Gen X) Audience Profile (US)

Who are they?

A generation with an analog childhood and digital adulthood make up the core of Tween parents, today. These technology literate parents are setting the rules for parenting in the digital age.

Parents use their smartphones an average of 1 hour and 34 minutes per day while they're at home (and that doesn't include time spent talking or texting). They are broadly, but not hugely positive about technology, judging that the benefits to their child are likely to outweigh the harms.

Digital media sits alongside established ways of interacting, playing and communicating; however more digitally skilled parents favor an older age of digital independence for their children.

What digital media do they actively engage with?

Moms   Dads
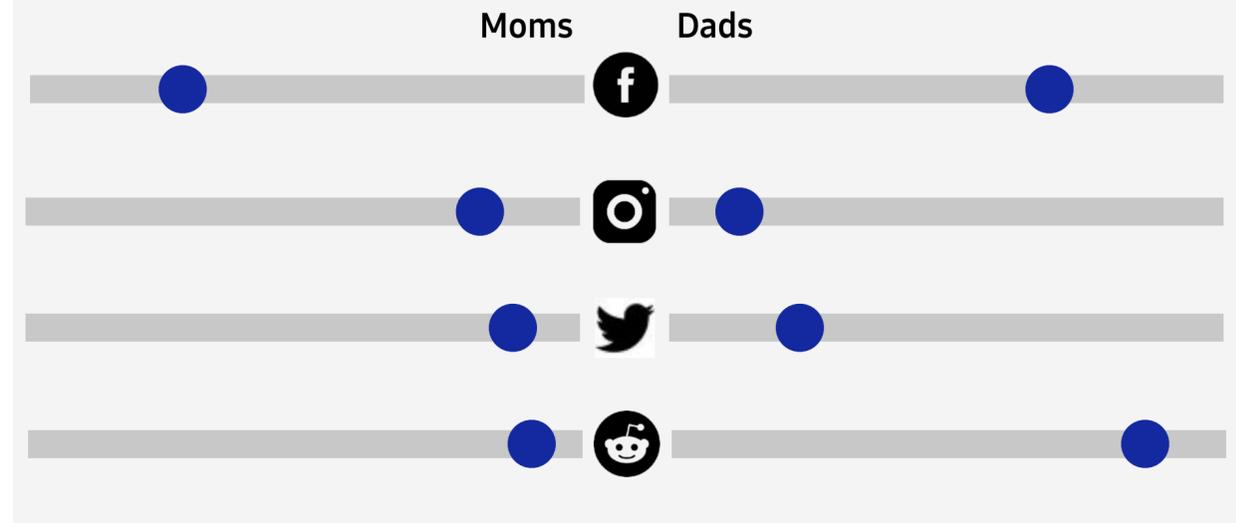
Parental Controls

- **Data and Digital Privacy**
  Among parents of 9-12 year olds, only 44% think their child is able to decide which information he or she should or should not share online.

- **Privacy at the Home**
  Only 14% of parents of 9-12 year olds, though 48% of parents of 13-17 year olds, judged their child was old enough to have privacy from them online.

- **Screen Time**
  For 5-12 year olds, parents report significantly more conflict about screen time than about how children use the technologies themselves.

Rules of Engagement

- **Communication at its Core**
  Families turn to digital media to keep in touch, from calls, emails and texts to newer media like messaging apps and video chat.

- **Digital ≠ Isolation**
  Media- and internet-related activities are as common a way of sharing time within the family as are other activities.

- **Mindful Screen Time**
  Screen time awareness runs both way. While children don't need to know everything explaining what's happening on parents phones helps children understand why parents are distracted and demonstrate that devices maybe used to foster relationships.

Parental concerns about children's internet use

Category	Value
Data collection	50%
Reputation	42%
Stranger danger	41%
Cyber-bullying	40%
Content	39%
Time	37%
Radical-ization	29%

Parents Decision Journey

STEPS	TRIGGER	NEGOTIATION	EVALUATION	ACTIVATION	POST PURCHASE

"What is an emergency for one family is not always an emergency for another. And I wanted to know she could reach out whenever she needed us."

"Sometimes parents just follow their children. We have to negotiate to find the happy medium."

"Cell phones are a cornerstone of family dynamics."

EMOTIONS & THOUGHTS

ACTIONS

1 - Extracurricular actives or shifts in the workplace highlight safety and communication concerns.
2 - Seek advice about how best to provide children with tools to reach out to parents.
3 - Validate if children are mature and responsible enough for their own device.

4 - Seek advice and do some lite research regarding parental controls and best online behaviors.
5 - Have conversation with children about the responsibility of owning a cell phone.
6 - Set rules around cell phone privileges.

7 - Set a budget for the device and a monthly budget for talk, text and applications.
8 - Revaluate carriers and carrier plans, with an eye towards network and controls.
9 - Negotiate a shortlist of devices.

10 - Select a device from the shortlist and have it activated on a new line.
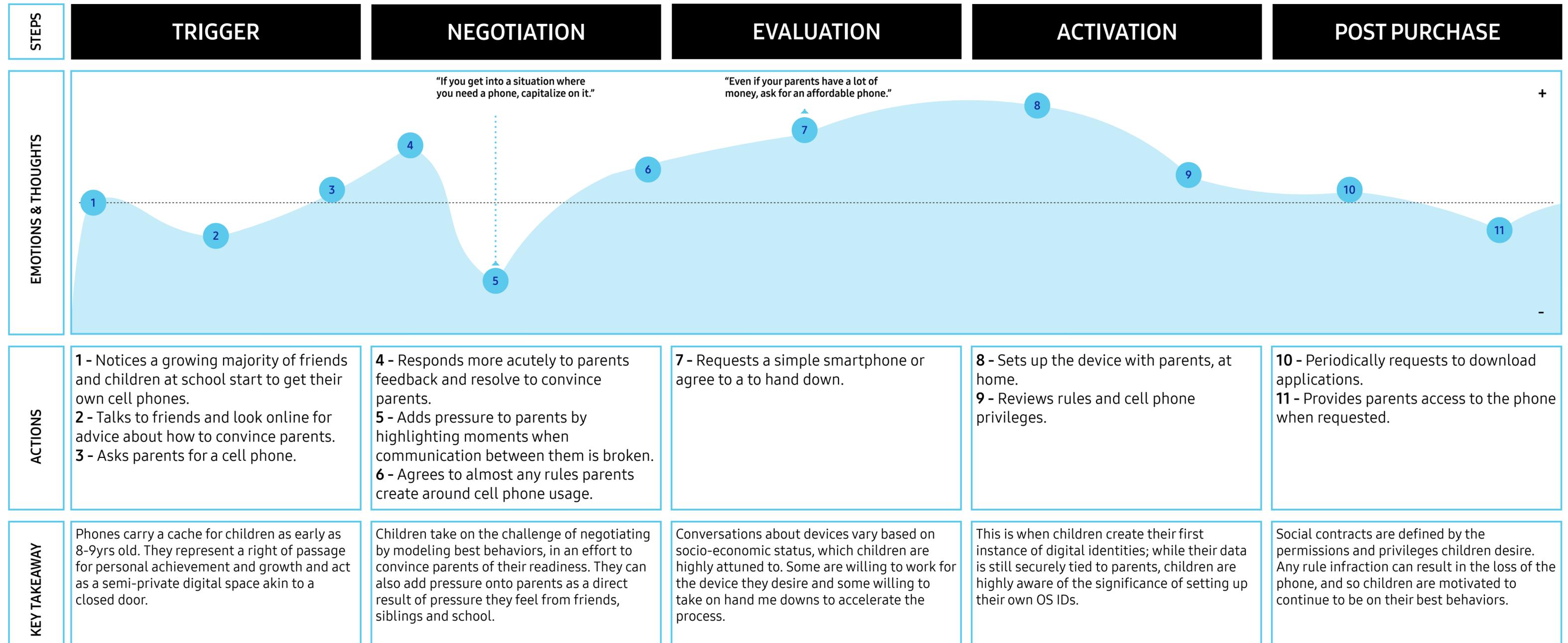**11 -** Set up the device, at home, with a new OS ID.

12 - Review rules and cell phone privileges.
13 - Periodically download and set up applications, by approving or constricting data sharing.

KEY TAKEAWAY

There are multiple factors to consider, but at its core family dynamic and personal definitions of safety are the catalyst for change. While acute awareness grows into questions about maturity, mounting peer pressure ultimately turns into the first moment of negotiation.

Peer pressure from school, other families and children drives parents to start having conversations and negotiating rules and conditions for children regarding what a smart phone purchase will mean for the them and the family dynamic.

Evaluation criteria may vary based on use case, but empirically price remains at the top of the list, followed closely by carrier decisions and finally device.

In addition to contracts with carriers, once the phone is purchased (or handed down) parents guide children to set up devices, whether it is creating new system IDs or authorizing new email addresses (each subject to unique circumstances based on carriers and OS.)

Social contracts are defined by the various concerns and use cases that change over time. While some families treat cell phones as privileges, others seem them as a right of passage.

NOTE: This Journey is based on the core experiences of families where all immediate members live in the same home.

SOURCE: Global Web Index; SellCell; Pew Research Center; ACM Digital Library; Understanding and Supporting Fathers and Fatherhood on Social Media Sites (University of Michigan); Common Sense Media; NY Times; Wired; PBS for Parents; American Academy of Pediatrics; Child Mind Institute
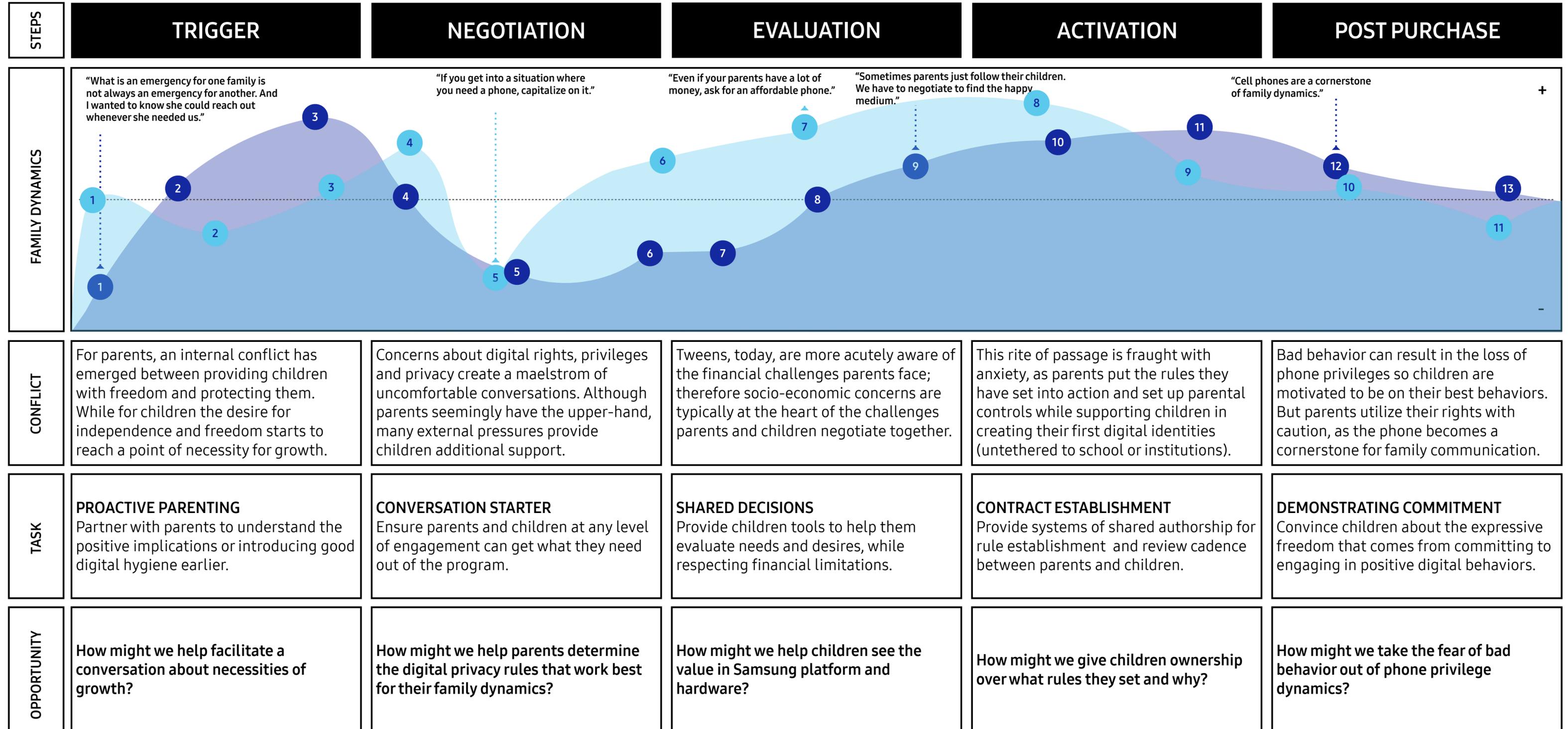
Tweens (10-13+) Decision Journey

STEPS	TRIGGER	NEGOTIATION	EVALUATION	ACTIVATION	POST PURCHASE

EMOTIONS & THOUGHTS

"If you get into a situation where you need a phone, capitalize on it."

"Even if your parents have a lot of money, ask for an affordable phone."

+

1 2 3 4 5 6 7 8 9 10 11

−

ACTIONS

TRIGGER	NEGOTIATION	EVALUATION	ACTIVATION	POST PURCHASE
1 - Notices a growing majority of friends and children at school start to get their own cell phones. **2 -** Talks to friends and look online for advice about how to convince parents. **3 -** Asks parents for a cell phone.	**4 -** Responds more acutely to parents feedback and resolve to convince parents. **5 -** Adds pressure to parents by highlighting moments when communication between them is broken. **6 -** Agrees to almost any rules parents create around cell phone usage.	**7 -** Requests a simple smartphone or agree to a to hand down.	**8 -** Sets up the device with parents, at home. **9 -** Reviews rules and cell phone privileges.	**10 -** Periodically requests to download applications. **11 -** Provides parents access to the phone when requested.

KEY TAKEAWAY

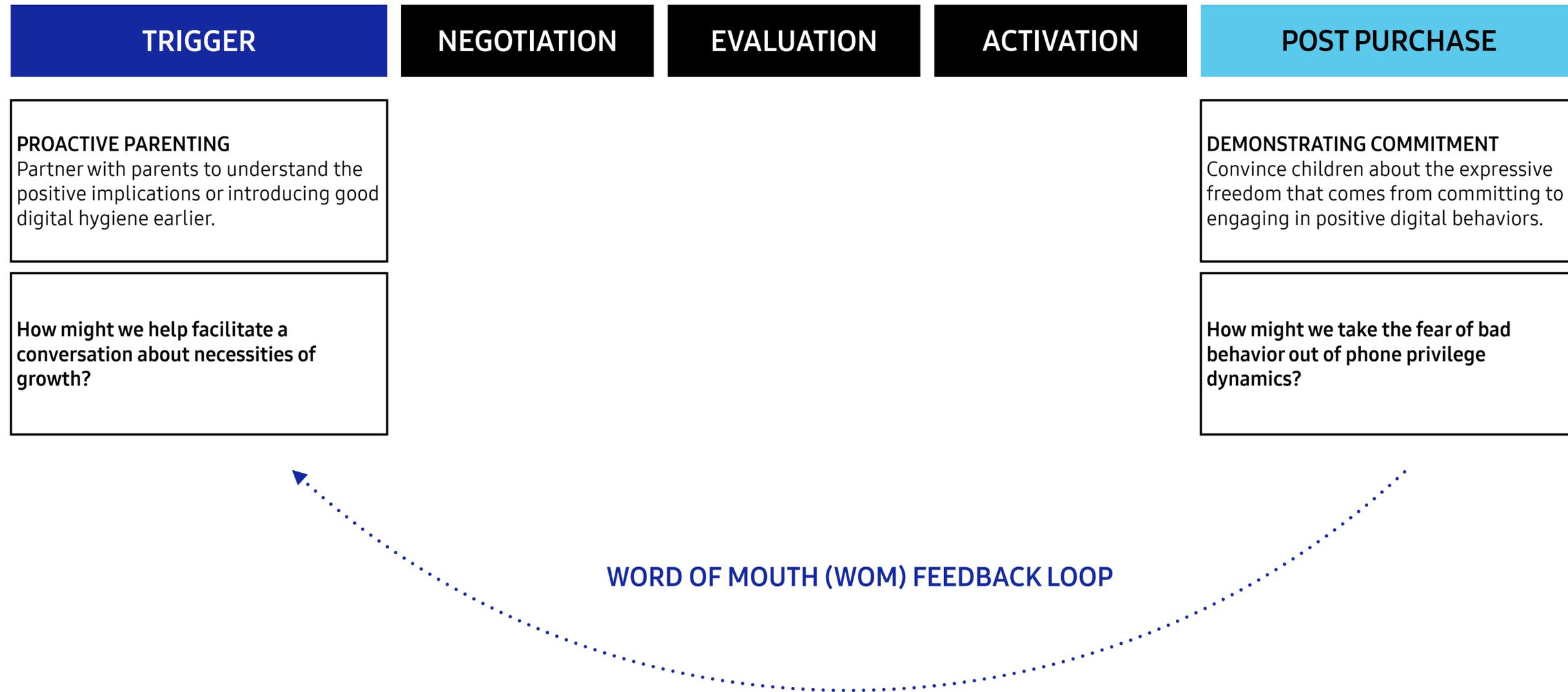| TRIGGER	NEGOTIATION	EVALUATION	ACTIVATION	POST PURCHASE
Phones carry a cache for children as early as 8-9yrs old. They represent a right of passage for personal achievement and growth and act as a semi-private digital space akin to a closed door.	Children take on the challenge of negotiating by modeling best behaviors, in an effort to convince parents of their readiness. They can also add pressure onto parents as a direct result of pressure they feel from friends, siblings and school.	Conversations about devices vary based on socio-economic status, which children are highly attuned to. Some are willing to work for the device they desire and some willing to take on hand me downs to accelerate the process.	This is when children create their first instance of digital identities; while their data is still securely tied to parents, children are highly aware of the significance of setting up their own OS IDs.	Social contracts are defined by the permissions and privileges children desire. Any rule infraction can result in the loss of the phone, and so children are motivated to continue to be on their best behaviors.

NOTE: Approximately 1-in-5 9 yr olds in the US own phones, today. This Journey is based on the core experiences of 10-11yr olds.

SOURCE: Global Web Index; Ipsos; Scholastic; understood.org; Common Sense Media; YouTube Kids; American Academy of Pediatrics, NPR

Journey Matrix

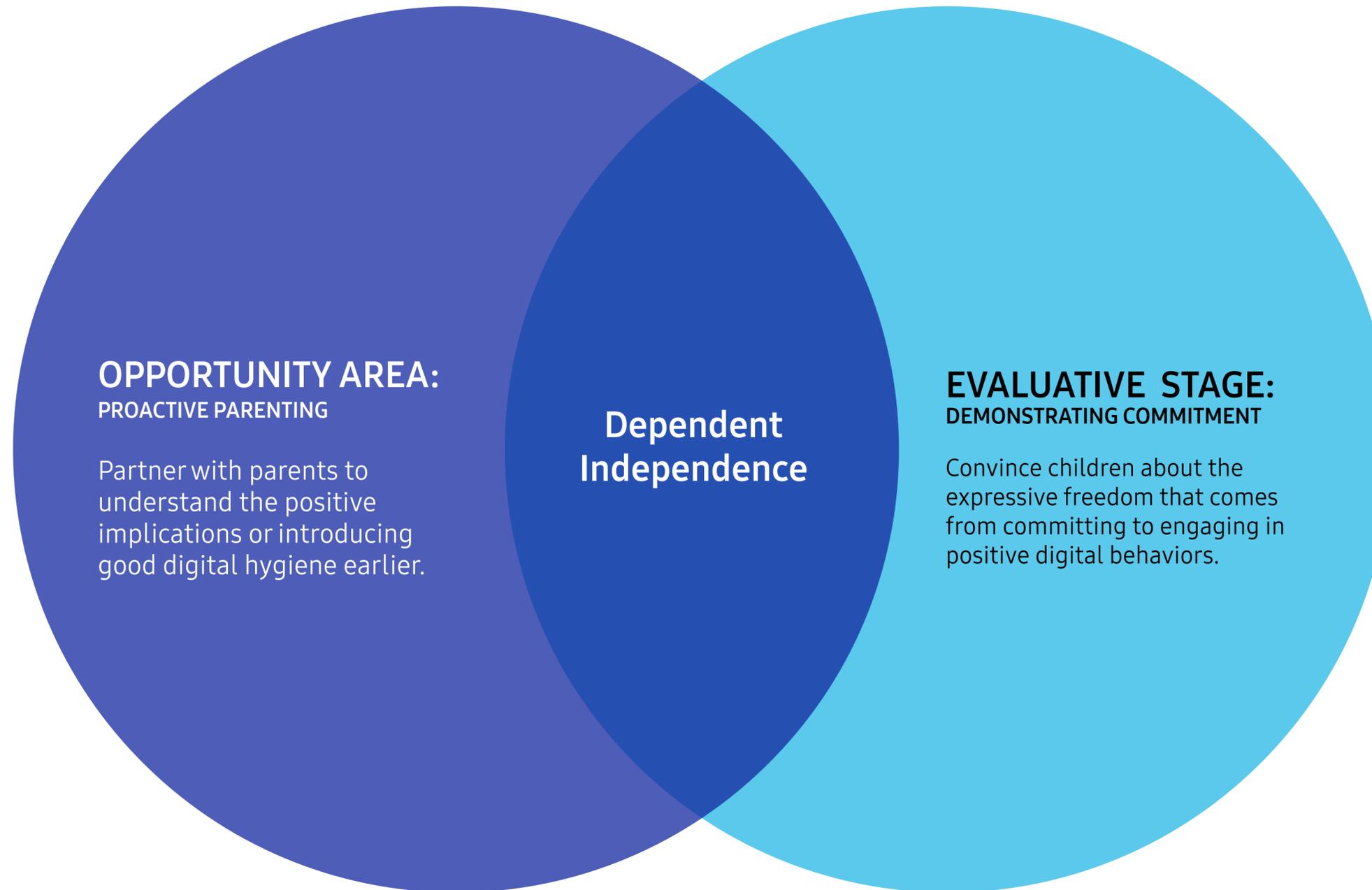| STEPS	TRIGGER	NEGOTIATION	EVALUATION	ACTIVATION	POST PURCHASE
FAMILY DYNAMICS	"What is an emergency for one family is not always an emergency for another. And I wanted to know she could reach out whenever she needed us."	"If you get into a situation where you need a phone, capitalize on it."	"Even if your parents have a lot of money, ask for an affordable phone."	"Sometimes parents just follow their children. We have to negotiate to find the happy medium."	"Cell phones are a cornerstone of family dynamics."
CONFLICT	For parents, an internal conflict has emerged between providing children with freedom and protecting them. While for children the desire for independence and freedom starts to reach a point of necessity for growth.	Concerns about digital rights, privileges and privacy create a maelstrom of uncomfortable conversations. Although parents seemingly have the upper-hand, many external pressures provide children additional support.	Tweens, today, are more acutely aware of the financial challenges parents face; therefore socio-economic concerns are typically at the heart of the challenges parents and children negotiate together.	This rite of passage is fraught with anxiety, as parents put the rules they have set into action and set up parental controls while supporting children in creating their first digital identities (untethered to school or institutions).	Bad behavior can result in the loss of phone privileges so children are motivated to be on their best behaviors. But parents utilize their rights with caution, as the phone becomes a cornerstone for family communication.
TASK	**PROACTIVE PARENTING** Partner with parents to understand the positive implications or introducing good digital hygiene earlier.	**CONVERSATION STARTER** Ensure parents and children at any level of engagement can get what they need out of the program.	**SHARED DECISIONS** Provide children tools to help them evaluate needs and desires, while respecting financial limitations.	**CONTRACT ESTABLISHMENT** Provide systems of shared authorship for rule establishment and review cadence between parents and children.	**DEMONSTRATING COMMITMENT** Convince children about the expressive freedom that comes from committing to engaging in positive digital behaviors.
OPPORTUNITY	How might we help facilitate a conversation about necessities of growth?	How might we help parents determine the digital privacy rules that work best for their family dynamics?	How might we help children see the value in Samsung platform and hardware?	How might we give children ownership over what rules they set and why?	How might we take the fear of bad behavior out of phone privilege dynamics?

Identifying the Intersection Across the Journey

TRIGGER	NEGOTIATION	EVALUATION	ACTIVATION	POST PURCHASE

PROACTIVE PARENTING
Partner with parents to understand the positive implications or introducing good digital hygiene earlier.

DEMONSTRATING COMMITMENT
Convince children about the expressive freedom that comes from committing to engaging in positive digital behaviors.

How might we help facilitate a conversation about necessities of growth?

How might we take the fear of bad behavior out of phone privilege dynamics?

WORD OF MOUTH (WOM) FEEDBACK LOOP

Defining a MVP for the BETA

OPPORTUNITY AREA:
PROACTIVE PARENTING

Partner with parents to understand the positive implications or introducing good digital hygiene earlier.

Dependent Independence

EVALUATIVE STAGE:
DEMONSTRATING COMMITMENT

Convince children about the expressive freedom that comes from committing to engaging in positive digital behaviors.

Behavioral Contract: Dependent Independence

A Tale of Two Freedoms

Children thrive when they are given the room to explore, while relying on a steady attachment with their parents.

Reassuring parents about the freedoms granted to their children (the freedom to, or positive freedoms, and the freedom from, or negative freedoms) liberates them from the need to engage in ongoing supervision, giving their children more room to discover who they are and creatively express themselves.

Interaction Model

Freedom to play

Freedom to access information

Freedom To

Parents

Dependent Independence

Children 10–13+

Freedom From

Freedom from radical thought

Digital

Freedom from strangers

In Real Life
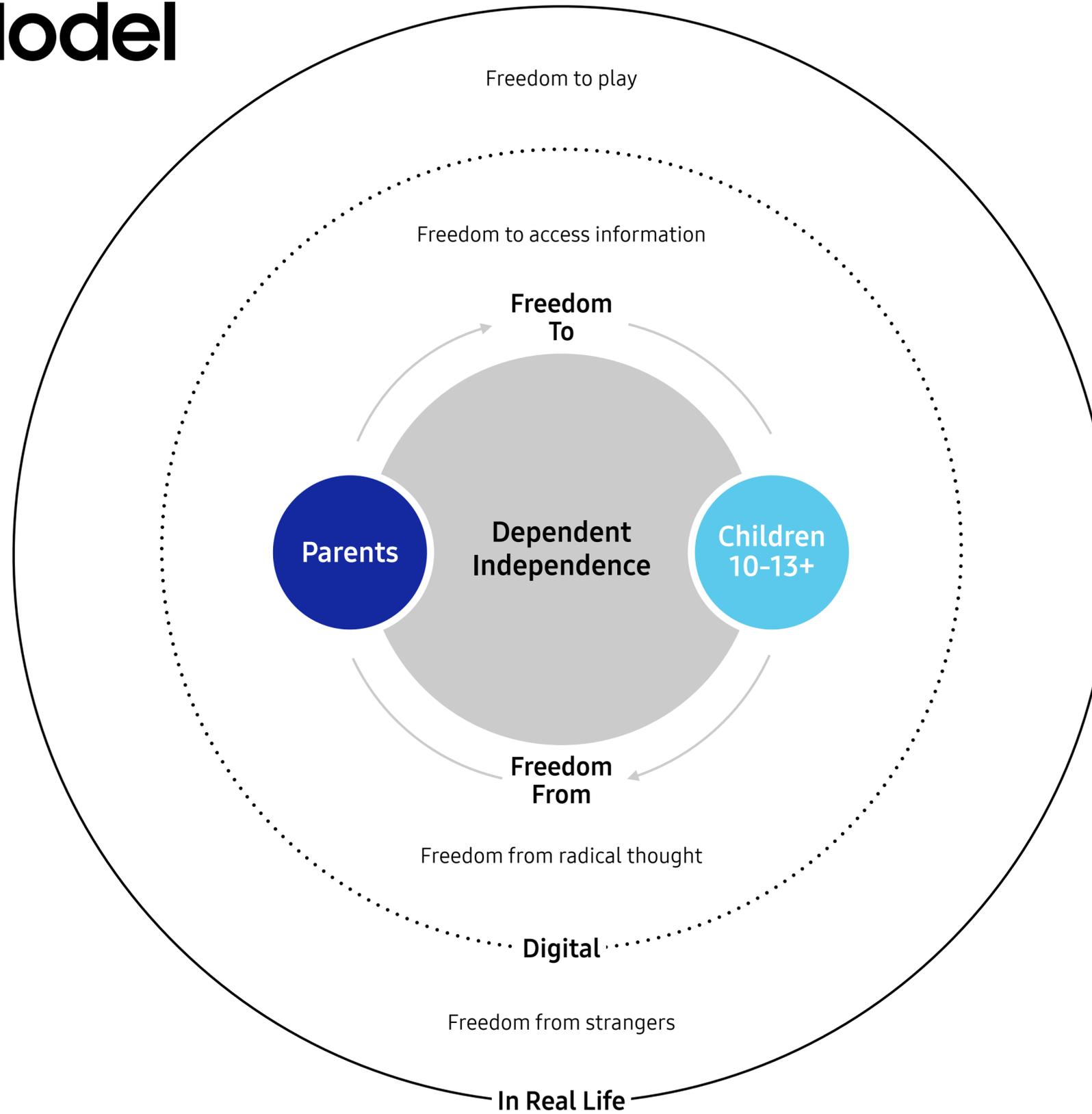
Digital Citizenship with a purpose

A path to Holistic Child Development

Children are mirrored in to becoming responsible, accountable, and good members of society- learning to appropriately use internet capable devices contributes to this kind of development.

Responsible behavior earns children the trust, autonomy, and independence they seek. When children are encouraged and reinforced for their initiative and positive usage, they begin to feel industrious, competent, and confident in their ability to form positive relationships with others.

Building Digital Citizenship

Investment in digital rights

Underpins an industrious perspective

Fiscally Responsible

My First Smartphone

Critical Thinking

Family

Affordable learning alternative

Value for money

Supports relational learning

Reinforces emotional resilience

Trust

Encourages ownership & responsibility

Introspective

Related

Autonomy

Promotes accountability

Confident

Creates positive civic engagement

Society

117

Fundaments of Good Digital Citizenship

Fiscally Responsible

Technology exposes children to questions of value, monetary or otherwise — from in-game currency to the value of data and important information. This makes every money conversation and every purchase in the household into an opportunity to teach children about the difference between **wants and needs.**

Critical Thinking

In this age of information there is an inherent need for children to prepare to utilize abstract thought, and deductive reasoning proactively. More than just learning how to resolve complex tasks, children have the tenacity to enable innovation through **effective exploration** and **lateral thinking**.

Introspection

It's important to let children try things, fail, and try again. It's also helpful to get kids to examine their own learning process. **Self-reflection, mindfulness, and metacognition** -- understanding how you learn — let kids gain a deeper understanding of themselves and how to approach new topics and circumstances.

Relatedness

With the advent of social networking tools, children can join the web of digitized relationships almost instantly. By fostering social skills, children are empowered to be strong **collaborators and communicators**. Social skills also allow us to have healthy relationships with family and friends and building empathy.

Experience Architecture
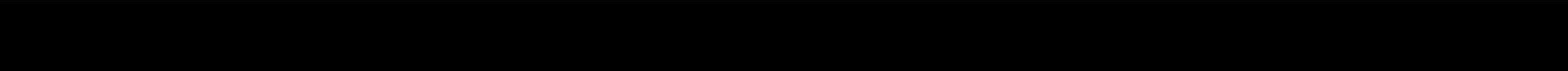
Brand Philosophy	████████████████████████
Vision	The My First Smartphone experience will reconcile parents and children by sparking **communication** and creating trust at a formative stage of development.
Brand Behavior	**Create and inspire ongoing parent–child engagement.**
Engagement Principal	Mirroring and amplifying positive digital empathy.
Interaction Model	
Digital Citizenship Pillars	
Content Drivers	

Integrated Ecosystem

Growth:
While it is encouraged to earn badges and grow through all skill trees, families can build their own growth plan with a guided trajectory.

Incentives for Growth:
Plan Builder

Application
The First Smartphone Application is the first touchpoint for parents and children. Once they initiate a contract, the application will act as a guide and measurement tool for the program.

Application:
Digital Contract and Games

Online Tools:
Content Hub and Reaction Videos

Online Tools:
Parents and children can receive additional mentorship and perspective throughout the program through various voices on the Content Hub.

Offline Tools:
Activities

Offline Tools:
As parents and children build Digital Citizenship skills they will also be prompted to practice those skills IRL.

BETA Program

Purpose

Our goal was to create an experience that encouraged families to work and play together to become happy, healthy digital citizens. Children, today are entering a digital world younger than any generation before them, and the earlier they understand the world they will inherit, the better prepared they are to navigate it.

The First Smartphone BETA program took a holistic approach to drive parents and children to reflect on their digital lives as individuals and as a family to become better, happier citizens for the digital world.

BETA Focal Points

Digital Citizenship Pillars
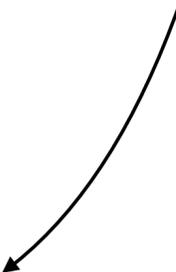
Content Drivers

EVALUATIVE STAGE: Demonstrating Commitment*

Convince children about the expressive freedom that comes from committing to engaging in positive digital behaviors.

NOTE: Although Fiscal Responsibility is a fundamental pillar for holistic development and core to good digital citizenship, we do NOT recommend introducing these topics until the Samsung is able to establish a stronger brand association with digital citizenship.

Identifying Topics

**Digital Citizenship
Pillars**

**Demonstrating
Commitment**

Moments of Tension

Selected Topics

Proprietary and confidential

Content Map

Every voice leads a new perspective to Digital Citizenship and as some gain preference we can start to better curate content.

Digital Citizenship Pillars

Introspection:	Relatedness:	Critical Thinking:
Helping children **BROWSE SAFELY** and knowingly test their limits in order to better understand themselves and the topics that interest them.	Enabling children to **ENGAGE POSITIVELY** while supporting their core motivation to "FIT IN," and providing tools for conflict resolution.	Encourage children to **BE SAVVY** in their pursuit of fun, freedom and collective equanimity.

Moments of Tension

Topics

Format

Source

BETA Test

Test Environment

The First Smartphone BETA Program was structured as a three month program that took participants, within the test environment, from skill-building through mastery related to the pillars of good digital citizenship.

The first month of the test program introduced parents and children to the various experiences they had access to throughout the program with simple weekly onboarding tasks. By the second month these tasks increasingly demanded a higher level of effort that enable parents and children to demonstrate digital citizenship skills. And finally, in the last month we continued to prompt parents and children to further build upon skills in practice and display mastery.

Brand Opinion

My First Smartphone has an extremely positive impact on the Samsung Brand.

- At the conclusion of the program, 90% of parents had a more positive opinion of Samsung when compared to when they started My First Smartphone.

- This improved opinion resulted in 78% of parents having a very favorable opinion of Samsung at the program end, increasing from 63% - 68% parents at the program outset.

- The positive outcome extends to Samsung's mobile products, where 80% of parents had an improved opinion.

- 61% of parents had a very favorable opinion of Samsung in terms of their ability to provide digital learning for parents and children after completing the program – it was 49% after one month. Further, 100% are confident Samsung could improve their child's digital safety.

Expectations and Necessity

Most parents found My First Smartphone matching their incoming expectations and widely believe it's a necessary program for children. Most are willing to pay for the program.

- Entering the program, 93% of parents thought the program would positively impact their relationship with their child. At the program conclusion, 85% agreed it did have this impact.

- 56% of parents indicate this type of program would make them likely to buy a smartphone for their child.

- At the start, 44% of parents who completed the program thought it was definitely necessary for their child. It increased to 63% of parents by the end of the three-month usage period.

- After completing the program, 88% of parents indicated they would be willing to pay for this program.

Behavior Change

The program had a dramatic impact on parent-child digital interaction.

- At the program outset, 49% of parents were extremely or very satisfied with their ability to interact digitally with their child. This increased to 85% of all parents by the program conclusion, with 73% indicating they saw behavior change in their child.

- This went beyond digital interaction. 73% of parents felt better about their ability to interact with their children offline at the program conclusion.

- These successes translated to 88% of parents agreeing that Samsung can impact the well-being of families.

- 76% of parents indicated their children were asking questions about digital responsibility once a week or more often after the program began.

Strategic Narrative

Marist

Guiding Key Business Questions

- What does Marist want to be famous for?

- How will Marist pursue progress without compromising its history and heritage?

- What would it mean for Marist to meet students "where they are" on their individual journeys to developing as people and professionals?

- How can Marist demonstrate progress in solving the higher education equation?

Situational Context

Beyond the Cliff: Weathering A Perfect Storm

Higher education faces a looming demographic storm. Decades-long patterns in fertility, migration, and immigration persistently nudge the country. As a result, the Northeast and Midwest—traditional higher education strongholds—expect to lose 5% of their college-aged populations between now and the mid-2020s. And up to 15%—that's over 400,000 fewer students—between 2025 and 2029.

These averages conceal crucial state level differences and don't provide enough perspective into the key three factors driving institutional planning: *diversity, perceptions of value,* and *industry expectations.*

The New Face of Diversity

America's colleges struggle to define, let alone achieve, diverse campuses in today's identity-centric and socioeconomically divided climate. Diversity matters — intensely and, arguably, more than ever before — but there is no trusty blueprint.

Exposure to people with different voices and experiences yields better learning however most campuses are laboring to find the best way to evolve. When colleges talk about "diversity," they are as confused as anyone about what it means.

It is about representing all the usual demographic categories. But it's also about harder-to-pin-down qualities.

All the usual demographic categories...

In NY, demand for four-year college-going students will contract quickly and significantly post-2026 with a projected overall decline of 17% in enrollment between 2027 and 2029.

Projected Number of Four-Year College-Going Students in New York and New Jersey (Thousands), by Race/Ethnicity

Declining:
Black (-38%)
White (-20%)
Asian American (-5%)

Growing:
Hispanic (+4%)

White   Black   Hispanic   Asian American

■ 2017   ■ 2029
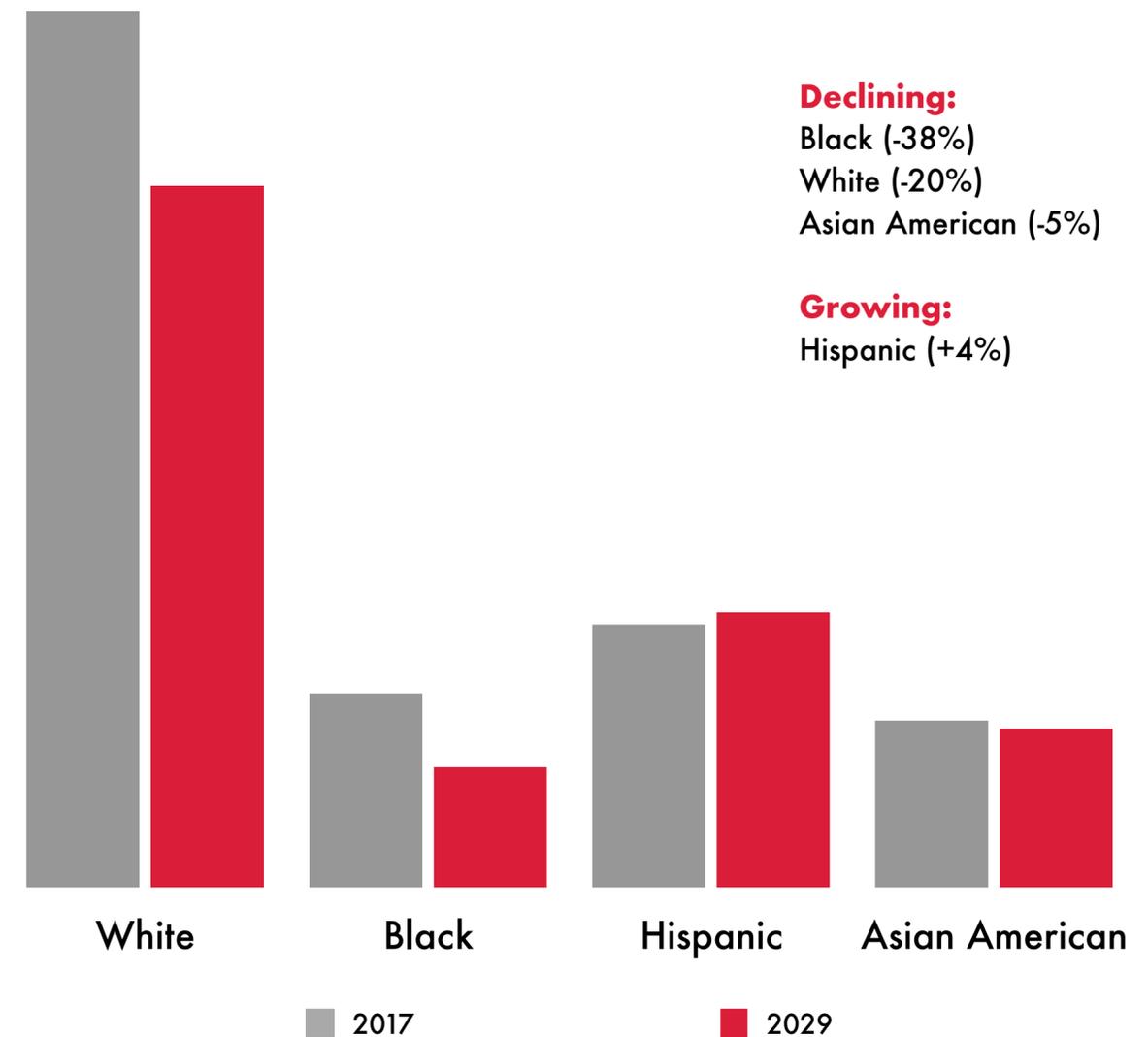
Source: Grawe, Nathan D., Demographics and the Demand for Higher Education, 2017; EAB analysis.

... and the harder-to-pin-down qualities.

Rather than presenting themselves as eager to take risks and wrestle with new ideas, many students seem to just want to go to a great school, get a great job, and have a nice life; however sameness presents an admissions challenge.

One of the three areas with the lowest satisfaction level was Marist's inclusiveness of diverse individuals (88.2%). Comments among those who were "dissatisfied" or "very dissatisfied" focused on a lack of diversity, social status, and an inability to meet with new people.

For example, one student stated *"I wish that there was more diversity in terms of race and financial background. A lot of the time I feel as though my classmates act spoiled and take things for granted. It's a small complaint but I wish it was different."*

While another commented, *"Marist is a great school, don't get me wrong, but there are so many factors from the community, administration, and climate that don't make it welcoming for many especially minorities and underrepresented groups."*

It's hard to argue that race and ethnicity are not important, but it is not the only form of diversity. With shifting demographic cohorts, it has become increasingly important to find students who can bring a certain diversity of thought.

Perceptions of Value

From policymakers and parents to students themselves, challenges to higher education's value, purpose and return on investment are on the rise.

Liberal arts and professional education programs provide different experiences to their students, and debate has begun to surface over which is most advantageous in the long run. As the job market becomes more competitive, students and parents alike are increasingly wary of spending the money for a degree they fear won't help them get a job.

The values of higher education

The increasing diversity of contemporary students plays a significant role in the increased focus on pre-professional and professional studies. Students who come from an increasingly broad socioeconomic spectrum and who, in the past, would have worked right after graduating from high school, often seek "practical" or professional education from the institutions they attend.

While the choice to pursue higher education is largely driven by career aspirations, institution choice is primarily driven by constraints. The main reason for choosing their postsecondary institution is location (28%) followed closely by access or affordability (22%) — including the availability of online courses, flexible programs and financial aid.

And as state appropriations shrink, more students from across the total economic spectrum must pay more of their college education costs. In response, they want their bachelor's degree to provide access to employment that will pay their college loans and provide a good living.

Average Public Institution Net Price as % of Median Household Income

States (left to right): Alaska, Washington, Hawaii, California, Florida, North Dakota, Utah, Connecticut, Deleware, Indiana, Maryland, Texas, District of Columbia, New Jersey, New York (20%), Georgia, Nevada, New Mexico, North Carolina, Massachusetts, Michigan, Oklahoma, West Virginia, Wyoming, Colorado, Kansas, Louisiana, Minnesota, Missouri, Rhode Island, Wisconsin, Arizona, Maine, Nebraska, Ohio, Idaho, Illinois, Iowa, Kentucky, Montana, Virginia, Arkansas, New Hampshire, Oregon, South Dakota, Tennessee, Vermont, Mississippi, Pennsylvania, Alabama, South Carolina (33%). Alaska 13%.

Average Private Institution Net Price as % of Median Household Income
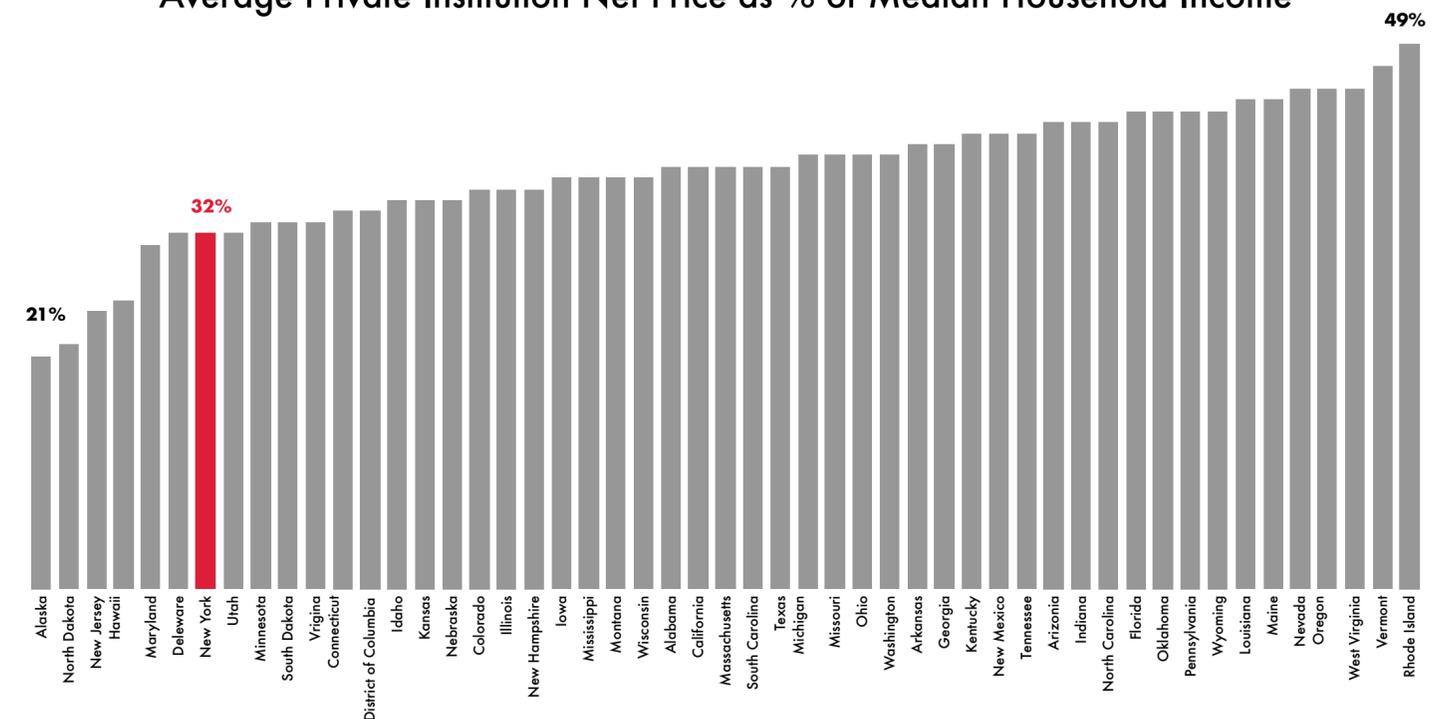
States (left to right): Alaska (21%), North Dakota, New Jersey, Hawaii, Maryland, Deleware, New York (32%), Utah, Minnesota, South Dakota, Virgina, Connecticut, District of Columbia, Idaho, Kansas, Nebraska, Colorado, Illinois, New Hampshire, Iowa, Mississippi, Montana, Wisconsin, Alabama, California, Massachusetts, South Carolina, Texas, Michigan, Missouri, Ohio, Washington, Arkansas, Georgia, Kentucky, New Mexico, Tennessee, Arizona, Indiana, North Carolina, Florida, Oklahoma, Pennsylvania, Wyoming, Louisiana, Maine, Nevada, Oregon, West Virginia, Vermont, Rhode Island (49%).

ROI/Time

Many seem to believe a professional education will result in a higher salary, and indeed those recently graduated from professional programs do earn slightly higher salaries on average than their counterparts in the liberal arts. However, when comparing the average salaries of professional and liberal arts graduates later on in their careers, liberal arts students earn the same or slightly more on average. What your salary will be depends much more on your chosen career field than whether you received a professional or liberal arts education.

Median annual earnings for college graduates, by age-group and area of undergraduate major (2012-14)

- Humanities and Social Sciences
- Physical Sciences, Natural Sciences and Mathematics
- Professional and Preprofessional
- Engineering
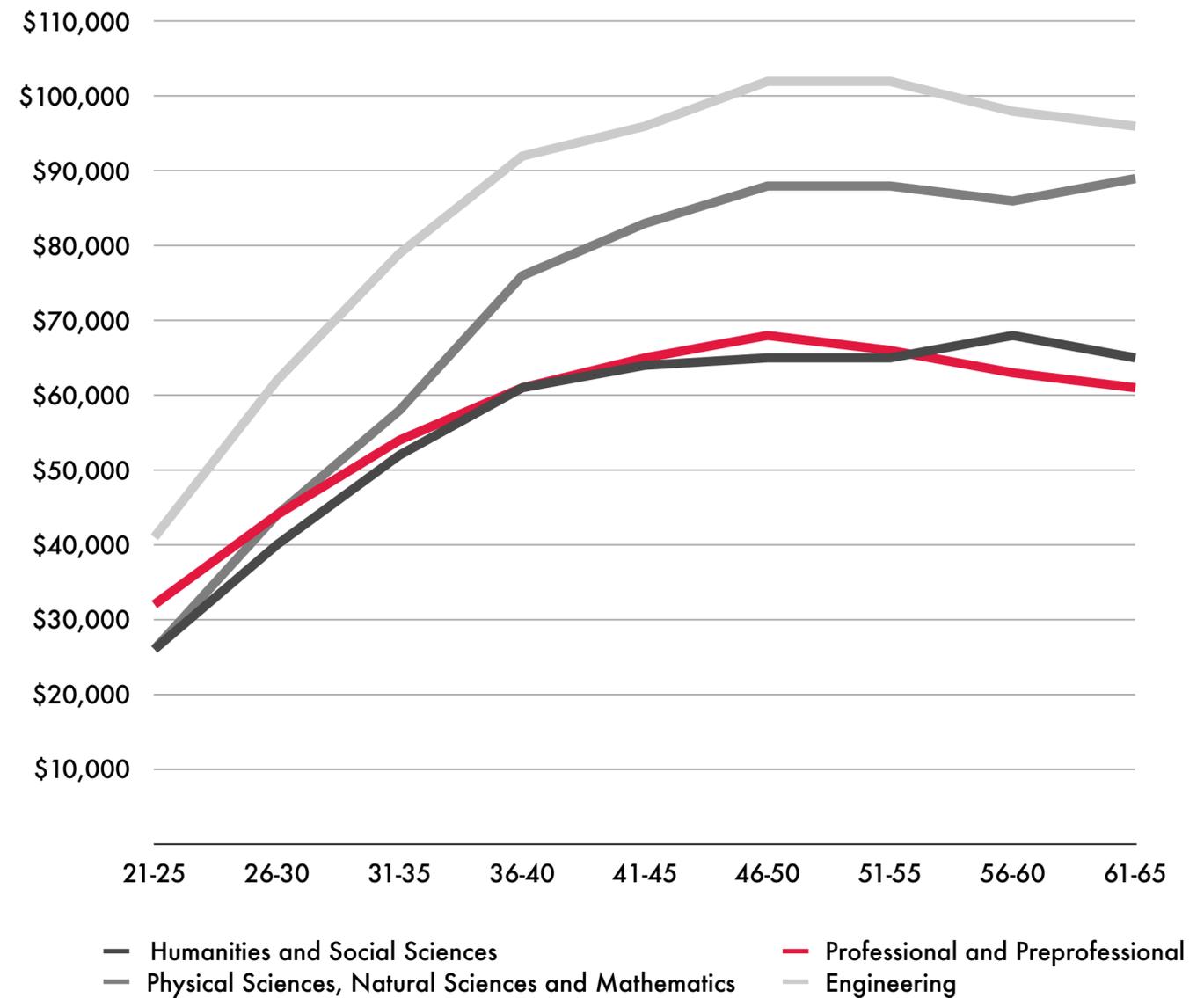
Source: Data from US Census Bureau, 2014, American Community Survey (Last Revised: August 23, 2017)

A False Choice

This false choice - between Liberal Arts and Pre-Professional studies - underscores the statements of policy makers across the nation calling for reduced funding for the humanities and social sciences in favor of support for more "practical" studies in science, technology, engineering, and math (STEM fields), or professional areas.

Employers express a higher degree of confidence in colleges and universities than does the American public. They seek graduates who are ready to help them innovate and privilege broad learning over narrow learning.

Malleable Tectonic Shifts

Three in four employers urged colleges and universities to "place more emphasis" on five key learning outcomes: critical thinking, complex problem solving, written and oral communication, and applied knowledge in real-world settings.

Hiring managers (73%) place a notably higher level of importance on staying current on changing technology and its applications in the workplace then executives (60%) do.

Employers seek graduates with "cross-functional" proficiencies, meaning that these learners are not limited to one particular disciplinary frame of reference, but rather can work adaptively and integrate across disparate fields of expertise and enterprise.

A majority of employers believe that most recent graduates have the skills and knowledge needed to succeed in entry-level positions.

Very Important Skills for Recent College Grads

- Able to effectively communicate orally
- Critical thinking/ analytical reasoning
- Ethical judgment and decision-making
- Able to work effectively in teams
- Able to work independently (prioritize, manage time)
- Self motivated, intuitive, proactive: idea/solutions
- Able to communicate effectively in writing
- Can apply knowledge/skills to real-world settings

■ Business Executives   ■ Hiring Managers

Innovative and Disruptive Responses to the Storm

Northeastern University

Northeastern recent transitions are part of the University's vision for *a networked university*, that empowers humans to be agile learners, thinkers, and creators, beyond the capacity of any machine:

- Integrative Experiential Education
- New Knowledge through Foundational and Translational Research
- Entrepreneurship and Innovation
- A Diverse and Inclusive Community
- A Global Perspective Grounded in Local Roots
- Commitment to Excellence with a Purpose

Cornell University

Cornell Tech is a technology, business, law, and design campus located on Roosevelt Island in Manhattan, New York City.

It is a diverse environment of academics and practitioners who excel at imagining, researching and building digitally-enabled products and services to directly address societal and commercial needs.

Arizona State University

Arizona State University has *eliminated numerous traditional academic departments while creating more than a dozen interdisciplinary divisions* and schools to achieve more integrative learning and foster better problem-solving skills among their students.

And majors must complete an internship that requires the student to engage with such multidisciplinary notions.

This is Marist
(State-Of-The-State & Opportunity Assessment)

Strengths, Weaknesses, Opportunities & Threats

INTERNAL

STRENGTHS
What unique resources can you draw on?

WEAKNESSES
What are others likely to see as weaknesses?

EXTERNAL

OPPORTUNITIES
What trends could you take advantage of?

THREATS
What threats can harm you?

Strengths, Weaknesses, Opportunities & Threats

STRENGTHS

- Balanced Educational Approach
- Alumni Network
- Curricular Flexibility
- Strong Connections To Industry
- Marist Campus
- Personalized/Whole Student Focus
- A True Teaching Faculty
- Community/Service-Oriented

WEAKNESSES

- Lacking Strong Value Story
- Name Recognition/Lack of Awareness
- Diversity
- Lacking A Galvanizing Core Asset
- NYC Footprint
- Limited Research Portfolio

OPPORTUNITIES

- Urbanization
- Higher Education ROI
- Geographical Diversity
- Professional Programs/Adult Learning
- New credentialing systems
- Interdisciplinary Degrees
- Applied Liberal Arts
- Technology Facilitated Education

THREATS

- Affordability Issues
- Public Policy
- Demographic Shifts
- Higher Education Alternatives/Disruption
- Questioning the Value of Higher Education
- Shrinking Market For Traditional Liberal Arts
- Cultural Polarization

Strengths

Balanced Education: Liberal Arts with a Practical Tinge

Communication Opportunity:
Showcase how Marist's foundational Liberal Arts approach, prepares students not solely for a job, but for long-term career success.

"I think Marist really has this special sauce. It's the perfect mix of this really strong grounding in the liberal arts...but also an experiential piece."

• • •

"We need people who can relate to other people, but can also take on projects and get things done. The successful universities will find a way to blend the skills the liberal arts produce, like critical thinking and the ability to write well, with skills needed for careers and professions."

• • •

"Marist will give you the world on your own terms, is the way I see it. By that I mean, Marist is going to meet you where you want to be met."

Curricular Flexibility: The Opportunity to Define Yourself

Communication Opportunity:
Emphasize how Marist students are empowered to inform and direct the trajectory of their own education and shape their own pathways of success.

"We're not a traditional Liberal Arts institution, by any means, but that combined with the professional experience, and the experiential type of learning opportunities that we provide in study abroad, internships and undergraduate research is really curricular flexibility."

• • •

"There's so much opportunity at Marist to do whatever you want to do. They've really broken down the barriers."

• • •

"Marist's strength is in the diversity of its curriculum. Marist has found its niche in its interdisciplinarity. Its students are experiencing interdisciplinarity in a way that's going to make them successful and well-rounded."

Marist Alumni Network: Committed to the Future Generations of Graduates

Communication Opportunity:
Amplify relevant alumni success stories and mentorship narratives to demonstrate the powerful influence of the Marist professional network worldwide.

"The connection of being a Marist grad immediately opens the door to other Marist grads that happen to be in all these other areas. So even if Marist can't help directly, they can put me in touch with somebody that's got my interest in mind, only simply because I'm a Marist grad. Where you wouldn't have that with Rutgers. "

• • •

"The Marist narrative is about how the college has helped students out of their struggles and elevated their position in some way. That's where the alumni's passion and commitment comes from -their Marist experience defined who they are today."

• • •

"That's how Marist really helped me -they connected me. They literally put in email contact with alums from Goldman Sachs, JP Morgan and all of those. I met them in the city and they told me about their days and their jobs."

Strong Connections To Industry: A Gateway to Professional Opportunity

Communication Opportunity:
Leverage student outcomes data and job placement statistics as part of messaging and benchmark against national averages from competitive institutions.

"If you want to be seen, if you want the opportunity to hear about opportunities for internships, future work opportunities - go to Marist."

• • •

"To me, the real selling point came when I learned about the IBM connect with the Marist computer science department, because I was already in the STEM field."

• • •

"I do feel very secure in the idea of getting an internship this coming summer and getting a job post-grad because of the opportunities that are offered at Marist."

Marist Campus: Discovering a Hidden Gem

Communication Opportunity:
Key call-to-action throughout the communications ecosystem should be to drive prospective students, parents and guidance counselors to visit the campus, take the tour, and shadow students in order to experience Marist firsthand.

"I definitely loved the campus the second I set foot on it. It was almost a couple of years ago today that I came to visit and I did fall in love with the school. The more I looked at it, the more and more I fell in love with it."

• • •

"The campus visit is critical. Marist comes off very well because student tour guides are real people and kids and families connect with them."

• • •

"I call Marist the academic country club. It's strong in academics, but it's a beautiful campus with facilities that are to die for."

Personalized/Whole Student Focused: Students-First

Communication Opportunity:
Highlight Marist's "student-first" philosophy and approach and promote faculty accessibility, involvement, and personal investment in students' personal development and professional success.

"Our emphasis has always been making it a very student-focused and student-centered institution that appealed to all students with some common values and some common outcomes."

• • •

"I think the biggest thing is the personal relationship with a professor, because that leads itself into you know whatever research opportunities or access to their network from their working days, things like that, and then also I think they have a more vested interest in seeing you do well in their classes and therefore learn the material."

• • •

"Students here get a lot of contact with us as mentors whereas at a larger research university, the difference is that the students are going to be working with the graduate student or a postdoctoral fellow."

A Teaching Faculty: Leading-Edge Pedagogy

Communication Opportunity:
Emphasize Marist's focus on teaching over research and demonstrate impact of teaching innovations on improved student learning and outcomes.

"And, so a lot of their success, I think, is because of the training that they get and the time that they get with us because we're a faculty that are invested not just in making a research program succeed, but also just in our ability to teach."

• • •

"Another big thing is the visual of those classrooms, where the faculty sit amongst the students and chat with them instead of standing up in front of the room and lecturing at them."

• • •

"We are a student-centered program. That makes us very different than research institutions"

Community/Service-Oriented: The Value of Service

Communication Opportunity:
Expand upon the concepts of community and service to illustrate the impact that living Marist's core values has on students' sense of identity, pride, purpose and, ultimately, their contributions to society.

"We do have a big focus on service here. And, so we would say that no matter what field they go into, that service in some format might be part of who they are."

• • •

"A big thing is campus life. I think if a student can get involved and active, and become part of that Marist family, the Marist community. I think that's incredibly helpful. They love the community. They love the sense of belonging."

• • •

"Students feel like they're valued by their professors. They feel they are in a place where people care about them, and people want them to s succeed. And by having that care and compassion, they then are more driven to succeed themselves because it's more of a family environment."

Weaknesses

Strong Value Story: The Value Is Choice

Communication Opportunity:
Communication Opportunity: Develop a value equation unique to Marist that favorably resonates with applicants, parents and the media.

"We don't talk about the value that students are getting. We should talk about graduation rates, career placement rates, satisfaction surveys. Where's that college-to-career bridge afterwards?"

• • •

"I think increasingly the emphasis will be around the question, can this substantial investment we're going to make as a family or a student is going to make through loans and other things justify the career paths that are available after college that will allow that significant investment?"

• • •

"When you think about the world in 5 to 10 to 15 years, most of the positions of these people are going to be having might not even exist. We have to think creatively on how to prepare them for the skill sets. I think that's the value of the liberal arts piece of it is you're combining the liberal arts with the innovation and the practical side of the house."

Name Recognition/Lack of Awareness: The Power of Positive Associations

Communications Opportunity:
Communications opportunity: Strengthen Marist brand associations with entities recognizable, valuable and desired by prospective students such as proximity to New York City, professional internships and opportunities.

"It's been a bit of a challenge going into these high-end schools and convincing the parents to send their kids to a school that is really not very well known."

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"We're not a very well-known school and I think even sometimes when a student is really, really excited about us I think sometimes the parent does have that final say."

• • •

"So the admissions officer came, and she was super great, but I had never heard about Marist. Because in foreign countries only those big Ivy Leagues, if you don't go to one of those, it's useless to study in the US."

Diversity: A Realistic Approach To Inclusion

Communications Opportunity:
Reflect on diversity from the student perspective, exercise caution in representation and focus on inclusivity narratives about individual students find their "fit" within the Marist community.

"The acceptance and tolerance of individual differences and diversity of the workplace, that's something Maris needs to work on because it is not a very diverse campus and we can always do better I think."

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"We are not in the business of just bringing in people for diversity sake, it is something that we still need to take into consideration that they are going be successful. We want them to enjoy their experience and do well here, so we have to take all of those things into consideration still."

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"I think that it continues to be a challenge and, especially as we continue to talk about given the customer base for many of the companies in which our students will be employed at, there is a goal within most institutions, corporations, to ensure that their employees reflect the diversity of their customers in the market. So we're not there yet."

A Galvanizing Core Asset: The Halo Effect

Communications Opportunity:
Identify and promote key assets of the college that embody the college's vision and purpose, both internally and externally, are differentiating and garner interest and attention from prospective students, parents, alumni, and the media.

"Where do we have these halos that actually can be scaled to create meaning for the institution, versus where we believe we're ahead just because we've been doing something for so long. What is the value add?"

· · ·

"Marist needs something, I think, to soar, and bring the whole place into an awareness for a great number of people from different communities. "

· · ·

"What are the markets we want to break into? And when we say new markets, there is we want to grow graduate programs. But, if you're going to start to talk about workforce development, micro credentialing, helping people advancing their careers, you actually have to have verticals that are attached to industry."

NYC Footprint:
The Long Hallway

Communications Opportunity:
Realistically portray NYC programs, internships, professional opportunities and executive center curriculum as an extension/enhancement to the Poughkeepsie campus experience.

"What is our relationship with New York City going to be? What are the programs we're going to be designing? How is that differentiating?"

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"My struggle is the transportation cost for students. For students with unpaid internships and for transportation to the city for career events, $50 round trip is a lot when you're a college student."

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"The Admissions office told me, he made it seem as if I could just go for a lunch and come back. They really do sell you on that. They really make it seem like it's closer than it is."

Research Portfolio: Amplifying Thought Leadership

Communications Opportunity:
Elevate the importance of faculty/student research as a core component of the Marist academic triangle and highlight instances of how faculty research and insight have impacted industry innovation.

"There is a very small research portfolio. Marist's liberal arts in many ways are applied liberal arts, its liberal arts to function in the world, not liberal arts to be thought leaders in the world."

• • •

"I would definitely like to see more regarding research. I've been doing research with a professor here and Marist was really good with sponsoring our travel expenses and stuff. But something that I would, from my interests, would be Marist achieving something regarding research."

• • •

"The expectations for scholarship have risen and the faculty have risen to the challenge."

Opportunities

Urbanization: The Best of All Possible Worlds

Communications Opportunity:
Emphasize the developmental, academic and professional benefits of straddling the rural-urban divide.

"I continuously looked at a lot of colleges. I have older siblings, so I was looking at colleges since I was 14 years old when I went with them, and I hated these colleges in the middle of nowhere away from the city. I hated it."

• • •

"They've made a choice to be in this pastoral campus that we have, right. But, they also want the connection to the city. And, I think that's the kind of best of both worlds that we're trying to sell."

• • •

"We think we have a compelling argument, but part of that argument, a big part, is New York City. Easy access. So when you talk to a kid in finance, or fashion, or communications, it's like why would you not want to be near New York City?"

Higher Education ROI: Understand the Investment Value

Communications Opportunity:
Help prospective students and parents distinguish between the investment value and market value of a Marist education by highlighting both immediate and long term financial benefits of dedicating four years to a Marist education.

"Marist in four years, you have your bachelors, you have a year's work experience and you have a masters. What's your ROI? In effect, you've paid for three. The salary has offset the fourth year and at the end of four years, you're making more money with more work experience and a higher degree credential, than the traditional four year bachelors degree."

• • •

"Outcomes, return on investment for a private school is critical. We just don't want to pay even the net out-of-pocket cost after aid is still higher than the public. Your ROI and your outcome information have to be really strong."

• • •

"We need to help you figure out how to use that degree, where it's going to be valuable, and what to couple with it to make yourself marketable and present yourself with opportunities when you leave."

Geographical Diversity: Expand the Marist Fit

Communications Opportunity: Develop region specific value propositions and understand and diminish perceived barriers to attendance in order to expand diversity efforts at Marist.

"We need to spread our branches and find targeted geographic locations where we can pull students from that are good matches for Marist in a variety of ways, programmatically, socially, economically, socioeconomically."

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"We're trying to figure out that balance between how much geographic diversity do we want to have at the expense of our applicant pool, because everybody wants more applications, but keep the geography. We want to be more geographically diverse, but increase applications."

• • •

"I'll be at a college fair and I've got my Marist banner, New York and Italy, and the mom and the student walk by and the mom looks down and she goes, "Oh, too far." And I'm like, "For who? You or the student?" And it's mostly the parent. They don't want their kids go."

Professional Programs/Adult Learning: The Benefits of Life-Long Learning

Communications Opportunity: Promote Marist's flexible curriculum and responsive approach to meeting students' educational needs at whatever stage of personal and professional development they are at.

"Well, Marist, like most universities and colleges in the United States today, is making sure that it has a diversified foundation of programs and tuition revenue for the health and contribution an operations of the institution."

• • •

"There are opportunities for differentiation for working adults who really have to balance so many other things. It's critical to have the right programs that are attached to the right skills to help people distinguish themselves in their careers and open doors. But if you can't offer it in the right format, it doesn't matter."

• • •

"Our alumni, most of our students, are working adults. They have families. They have other priorities. Again, the cost, the time to completion, those are important to them because they have other priorities."

New Credentialing Systems: A Portfolio Approach To Curriculum Design

Communications Opportunity:
Demonstrate the range, variety, breadth and depth of degrees, credentialing, access and formats available students at every stage of their development.

"We need a really exciting portfolio. By portfolio, I mean credit bearing, noncredit bearing, undergraduate, graduate. There's a certificate digital badge. There's a whole suite, a whole ecosystem of credentialing and skills that can really service what individuals need to advance their careers, what employers need for their organizational success."

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"We're very freshman focused here. It doesn't help when you have something like a cliff coming. It doesn't protect you. We either have to change to try to adhere to the cliff or we have to try to change on top of also developing other things to generate revenue so that we can stay afloat."

● ● ●

"There's a whole suite, a whole ecosystem of credentialing and skills that can really service what individuals need to advance their careers, what employers need for their organizational success. I'd like people in five years say that, 'Wow, Marist really has a great portfolio of contemporary and relevant programs.'"

Interdisciplinary Degrees: Choose Your Own Path

Communications Opportunity:
Emphasize how Marist has been a leader in interdisciplinary education because of the strong integration between the college's different schools and low barriers to pursue electives outside of a degree focus.

"I think that kind of entrepreneurial spirit of new programs, and experiential learning is a big piece of what happens here."

• • •

"Another interesting degree that's growing is interdisciplinary, which basically means you create your own degree. It's such a cool degree and it fits with the world today of you don't really know what your job could be so build your own degree. To me, that's very innovative and creative and fun and independent."

• • •

"There's an opportunity for students when they come in as an undecided freshman having that time and opportunity to figure out exactly what it is that they want to do."

Applied Liberal Arts: The Foundation for Career Success

Communication Opportunity:
Demonstrate how a Liberal Arts education, at Marist, provides students with a multi-disciplinary and holistic problem-solving approach that uniquely prepares them to address complex local and global challenges.

"In many ways, its applied liberal arts, its liberal arts to function in the world, not liberal arts to be thought leaders in the world. "

• • •

"The liberal arts training, but this whole idea of actually being a working professional, isn't just theoretical like it is in a lot of liberal arts institutions, where we're going to discuss theory and then hope that somewhere at the end there is a job. You see people in the city who are actually working, who are Marist alum that have the background that you have."

• • •

"That's a balance between technical skills, as well as those important communication skills and leadership skills that adults also need to bring to bear to open doors for their career advancement."

Technology Facilitated Education: Towards a Culture of Accessibility

Communication Opportunity:
Promote Marist rankings and leadership in blended education and distance learning innovation.

"We're a leader in the technology facilitated education learning space, so we have that to leverage. We have faculty who are skilled in using that particular format for making programs effective in learning through distance education. And we have career-related focused content that will help people with specific skills to distinguish themselves."

• • •

"I think the biggest opportunities are not going to be in high capital areas, but will be in new initiatives driven by technology and new ways of packaging degrees."

• • •

"I love that Marist has all these rankings about innovation and technology and classroom, and such."

Threats

Affordability Issues: Actions, Consequences and Paralysis

Communications Opportunity:
Address student/parent debt anxiety head-on by surfacing key data points such as student outcomes and job placement data.

"I think the real rub is it comes down to two things: net cost, how much out-of-pocket am I going to have to kick in, and if I'm taking out loans, what's that going to look like four, five years? How much debt am I going to have? The key is, is it worth it? Am I going to get a job? Am I going to be competitive in the marketplace? Will I make enough money to pay that back?"

• • •

"It's a more price-conscious consumer, so affordability is a greater part of the conversation."

• • •

"I remember affordability was one, my desire, my personal desire to go somewhere was another, and I would rank them like that. And I think degree pedigree was certainly up there because I had some bigger names that I could have chosen over Marist."

Public Policy: Confronting the Power of Free

Communications Opportunity:
Lessen the grip that the "power of free" has on choice factors by developing a value equation specifically to address threat from public competitors.

"Public policy is working against us. Free public tuition is now being offered in certain states for public colleges."

• • •

"When you look at UCONN, Canton, College of New Jersey, and Delaware, those four publics are our key competitors for us. Not necessarily because of the programs, it's just that they're in the geographic area, and they are seen as really good colleges, right. So, SUNY Canton, you can't go wrong there. It's extremely difficult to get in. It's a very good school. And, if you live in New York State, it's like half the price.

Demographic Shifts: A Responsive Ecosystem

Communications Opportunity:
Promote and demonstrate how Marist's flexible curriculum and responsive approach allows the college to meet students's educational needs where, when and how they need them.

"Markets are shifting dramatically now in terms of what families want for their children, what they can afford, even if they want something, fewer and fewer every year can afford private colleges. Students now are clearly much more career-oriented. They want degrees that have clear paths to employment and ultimately longterm careers. So there's just a whole shift in the demand from our client groups. "

• • •

"Its different cohorts of people coming to complete their degree. They're looking for different kinds of training. It's just the demographics shift."

• • •

"I think if we're looking for more aggressive growth, it's not with the challenging demographic of high school graduates. They're not making a lot more high school graduates for the next 18 years. On the other hand, adult undergraduate students and professional graduate students, that's where opportunity lies."

Higher Education Alternatives/ Disruption: Liberal Arts With Purpose

Communications Opportunity:
Demonstrate how Marist's balanced, flexible and responsive approach education is the solve and equation to address higher education dilemmas.

"The market is disrupting itself. This is Marist's greatest challenge."

• • •

"People are putting pressure on post-secondary education to have more job training, but that's not the origin of the university. The origin of the university is to provide people with skills for a lifetime, for intellectual development. "

• • •

"The higher ed problem is, how do we go from bachelor's to work, people aren't feeling the value of the bachelor's degree, let's minimize the liberal arts core. Right? To get students more credits and apply the courses and business courses and their majors. Marist has made a commitment to that strong, critical thinking core that they blended it well, right? How do we take what is special about that and reflect it in new forms of programming? "

Questioning The Value of Higher Education: An Investment In Personal and Professional Development

Communications Opportunity:
Emphasize the importance of "formation" as a vital stage of development that is necessary for the cultivation of personal qualities, professional skills and resilience to succeed in the dynamic workforce of the future.

"There's lot of talk about what's the point of an education. You have two sides to the coin. You have a graduate degree is the new bachelors and then you have, you don't need a degree. Look at Steve Jobs, he didn't have a degree."

• • •

"You can't even get into entry level without a Bachelor's in this city. A 35-year-old mid-level manager without baccalaureate degree is like a ghost walking into New York city."

• • •

"Sometimes I think parents and students don't really understand what 'liberal arts' means."

THREATS

Shrinking Market For Traditional Liberal Arts: Heritage In Progress

Communications Opportunity: Promote how the standards of critical thinking, which are foundational to Marist's liberal arts history and heritage, are creatively infused into all of the college's educational programs and credentialing initiatives, elevating the effectiveness of its teaching style and approach.

"We are putting all of our eggs in a basket of 18-22 year olds. That's not a growth strategy. There is a limited pool and we will have to be better than the rest."

• • •

"We can't adhere to institutions of the past. The academic cycle in which you have a sequestered 4-year experience away from the world in medieval castles is outdated. We are beyond that archetype now."

• • •

"Students don't have time to take 3 years to get an MBA and 36 credits. The curriculum needs to be more responsive in an environment where there are more adult learners -25-30 years -who are moving to urban areas. The traditional liberal arts market is shrinking."

Cultural Polarization: Unity Through Diversity

Communications Opportunity:
Promote the Marist campus as a microcosm of the macrocosm (and not a sequestered bubble or country club) and emphasize how discourse, dialogue and debate contribute to the learning throughout the Marist ecosystem.

"Our society has become so fractured with the political debates and the politics today, and everyone's got to choose sides and a lot of people become more tribal in how they view the world. I think that's carried over to Marist a little bit. And I think some people are concerned about that based on our, that sense of community that we were all so successful at creating here, and so I think that's a concern."

• • •

"Some families, have very particular goals. We're very conservative and we don't want to be around liberals. I don't party. I don't want to be at a place where Greek life's going to make me miserable. I have had families come in and say, "Won't go to a red state." I've not had any say they wouldn't go to a blue state but they're probably out there too. "

• • •

"You have a mix of students, some that have lived all over the world and others who are not exposed to diverse individuals, by that I mean diversity in the broadest sense, religion, ethnicity."

Getting to Know the Adventurous Upstart

"When we make the choice to dare greatly, we sign up to get our asses kicked. We can choose courage or we can choose comfort, but we can't have both. Not at the same time."

—Brené Brown

Research Approach

Analysis of student and industry data to connect our in-depth interviews with national-wide student attitudes.

2019 Admitted Students Survey
2019 Prospective Students Survey
2018 Student Sentiment Survey
2018 Adult Prospect Survey
EAB Enrollment Services Studies
Higher Education Demographic Index

Mindset Matters

An attitudinal cohort will more effectively grow a larger, richer and more diverse applicant pool by recruiting the personalities that embody the "Marist way," agnostic of the faces of the student body.

Why an Attitudinal Cohort?

Attitudinal segmentation uncovers student beliefs, needs and motivations about higher education, and specifically Marist. Traditionally using demographic and psychographic segments leads to more fractured cohorts, and don't represent someone's values, only what they are.

Attitudinal cohorts allow us to understand what they all agree on that is unique to them - their unifying rallying cry - and how they see themselves different from others - whether emotionally, culturally, intellectually.

The Adventurous Upstart

Students with the inherent desire to challenge themselves are more willing to step outside of their comfort zone. Adventurous Upstarts are the courageous students who want to take advantage of all that Marist offers - academically, socially and through access to opportunities - with a safety net to fall back on.

They are the aspirational mindset that will drive national recruiting against the impending demographics cliff. Attitudinal-centric recruiting will encourage other student cohorts because of their shared desire for academic quality and student outcomes.

Critical feeder pool to growing a diverse, high-quality and national applicant pool

Adventurous Upstarts Attitudes
Related to School Selection Process

WHO THEY ARE

Independent & adventurous personalities that drive school selection
Strong academics
More involved and self-directed in school selection process

Seek schools with greater demographic and geographic "diversity," and are more likely to "go away" to school

Represents Marist's national targets outside of the Northeast region
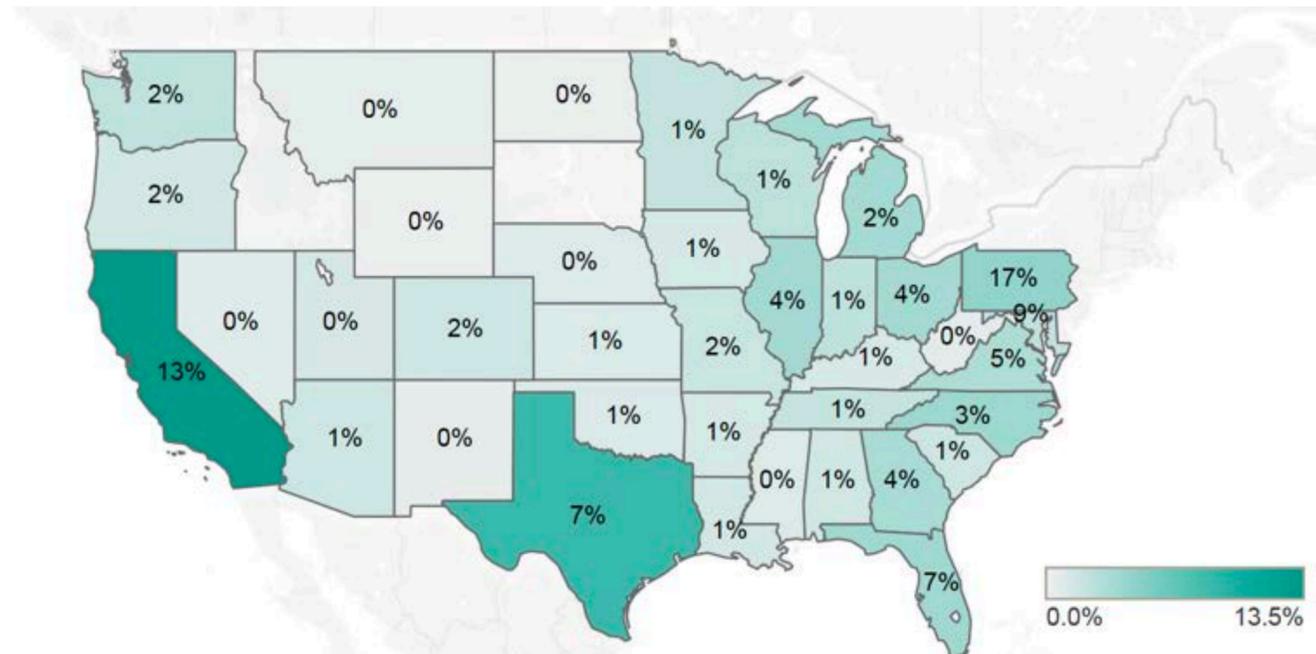
Represents
1.06M students
(6.3% of non-NE students)
applying & attending private NE schools 2020-2029

SELECTION CRITERIA

Most Important Reason for Selecting School:
- Quality (reputation/academic quality): 19% (#1)
- Feeling that I would fit in: 9% (#4)
- Affordability (tuition): 7% (#7)
- Proximity (close to home): 1% (#13 of 15)

Describe their Selected School as:
1. Intelligent/Intellectual (67%)
2. High-Quality (66%)
3. Challenging (58%)
- Comfortable (38%, 19 of 32)

Student Pain Point

Students feel pressure to find a balanced school consideration set
at the beginning of the selection process.

"Students put enough pressure on themselves and the other students, and their parents put enough pressure on them that the majority of their lists are filled with reach schools. I feel like I need to be the one that's actually playing it safe and bringing them back down to reality."
—Guidance Counselor in NY

"Students present themselves like they're ready for the world but they become very fearful when you start talking about, 'if you're five hours away you might not be able to come home as easily.' I've had students commit to an institution but they've come back home within that semester."
—Guidance Counselor in CT

Choice Factor: **motivated by selection criteria that give them assurances**
amidst the risk associated with the uncertainty of their educational experience

Non-Northeast Students Attending School in Marist Region
Adventurous Upstarts

Most Important Reason for Selecting School:
- Quality (reputation/academic quality): 19% (#1)
- Feeling that I would fit in: 9% (#4)
- Affordability (tuition): 7% (#7)
- Proximity (close to home): 1% (#13 of 15)

Describe their Selected School as:
1. Intelligent/Intellectual (67%)
2. High-Quality (66%)
3. Challenging (58%)
- Comfortable (38%, 19 of 32)

Represents **1.06M students** (6.3% of non-NE students) applying & attending *private* NE schools 2020-2029

Northeast Students Attending School in Marist Region
Delayed Achievers

Most Important Reason for Selecting School:
- Affordability (tuition): 17% (#1)
- Quality (reputation/academic quality): 13% (#3)
- Proximity (close to home): 7% (#7 of 15)

Describe their Selected School as:
1. Friendly/Inclusive (56%)
2. Comfortable (53%)
3. Diverse (51%), Fun/Exciting (51%)
- High Quality (47%, 7 of 32)
- Intelligent/Intellectual (46%, 8 of 32)

Represents **623K students** (80.5% of NE students) applying & attending *private/public* NE schools 2020-2029

Adult Learners
are more concerned with the financial risk and value return of continued learning. 70% of adult learners seek skills and knowledge directly relevant to the workplace. They want programs with flexible options to balance personal and career obligations.

Insight

Adventurous Upstarts are willing to take risks and open themselves up to new experiences **IF** they are confident that there is something to emotionally fall back on.
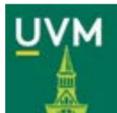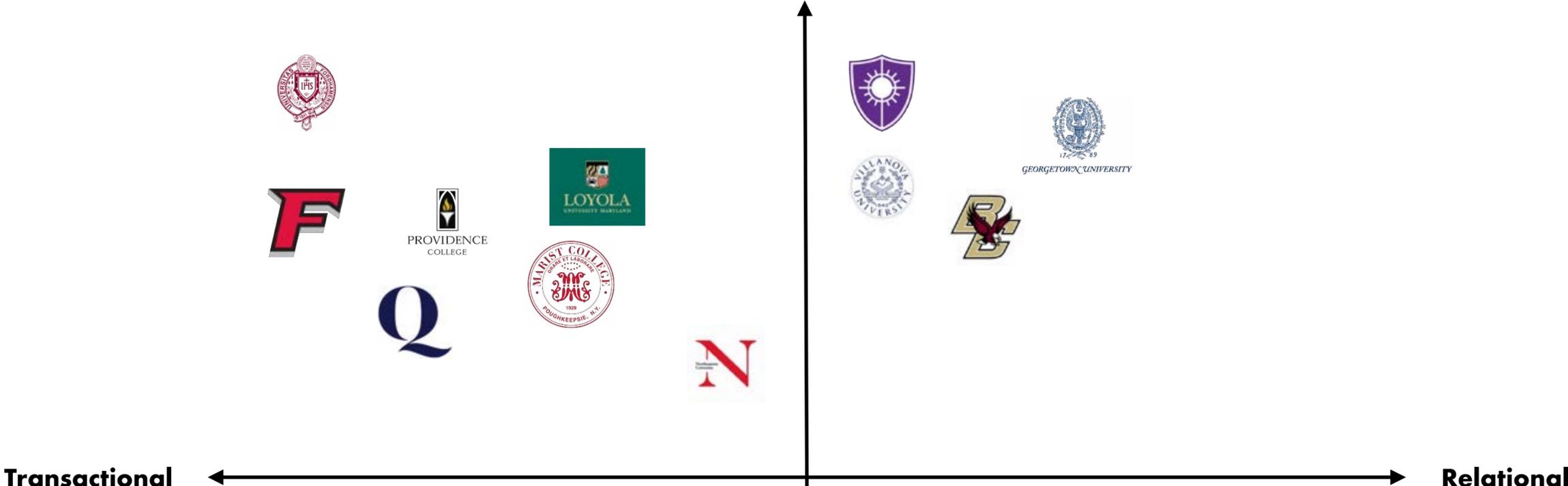
"We're just far enough away that students feel they're getting more of that independent experience, but they have the safety net of being able to get home really easily or see their parents on a weekend."
*–Guidance Counselor in NY*

"I did a whole pros cons exercise at the end, and Marist was the one that came out on top, and I decided the adventure was what I was going to go for and get over here, and go out on my own for a bit."
–Current Student from West Coast

Marist Brand Positioning Evolution

Academic Quality Challenged By
The Massifiction of Higher Education

The massification of higher education has meant that students have more influence within the system, but that this influence is necessarily empowering for students is contested.

When students act as consumers the traditional models of education, pedagogy, and mission are continually being assessed and reassessed, often morphing from practices of critical inquiry to passive participatory experience. Rather than empowering students their futures start to become transactional.

Finding a balance between these shifting power dynamics can help colleges and universities empower students to build stronger relationships with their schools as they continuously pursue higher education throughout their lives.

A university's strongest asset is the deep bond that we form with our students – through our faculty, guidance counselors, student activities organizations, corporate partners, career counseling consultants and alumni organizations.

–Chris Dellarocas, Inside Higher Education

TRANSACTIONAL

RELATIONAL

"When we make the choice to dare greatly, we sign up to get our asses kicked. We can choose courage or we can choose comfort, but we can't have both. Not at the same time."

—Brené Brown

The Adventurous Upstart

Students with the inherent desire to challenge themselves are more willing to step outside of their comfort zone. Adventurous Upstarts are the courageous students who want to take advantage of all that Marist offers - academically, socially and through access to opportunities - with a safety net to fall back on.

They are the aspirational mindset that will drive national recruiting against the impending demographics cliff. Attitudinal-centric recruiting will encourage other student cohorts because of their shared desire for academic quality and student outcomes.

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Traditional
Liberal Arts Education

Transactional

Relational

Pre-professional
Vocational Education

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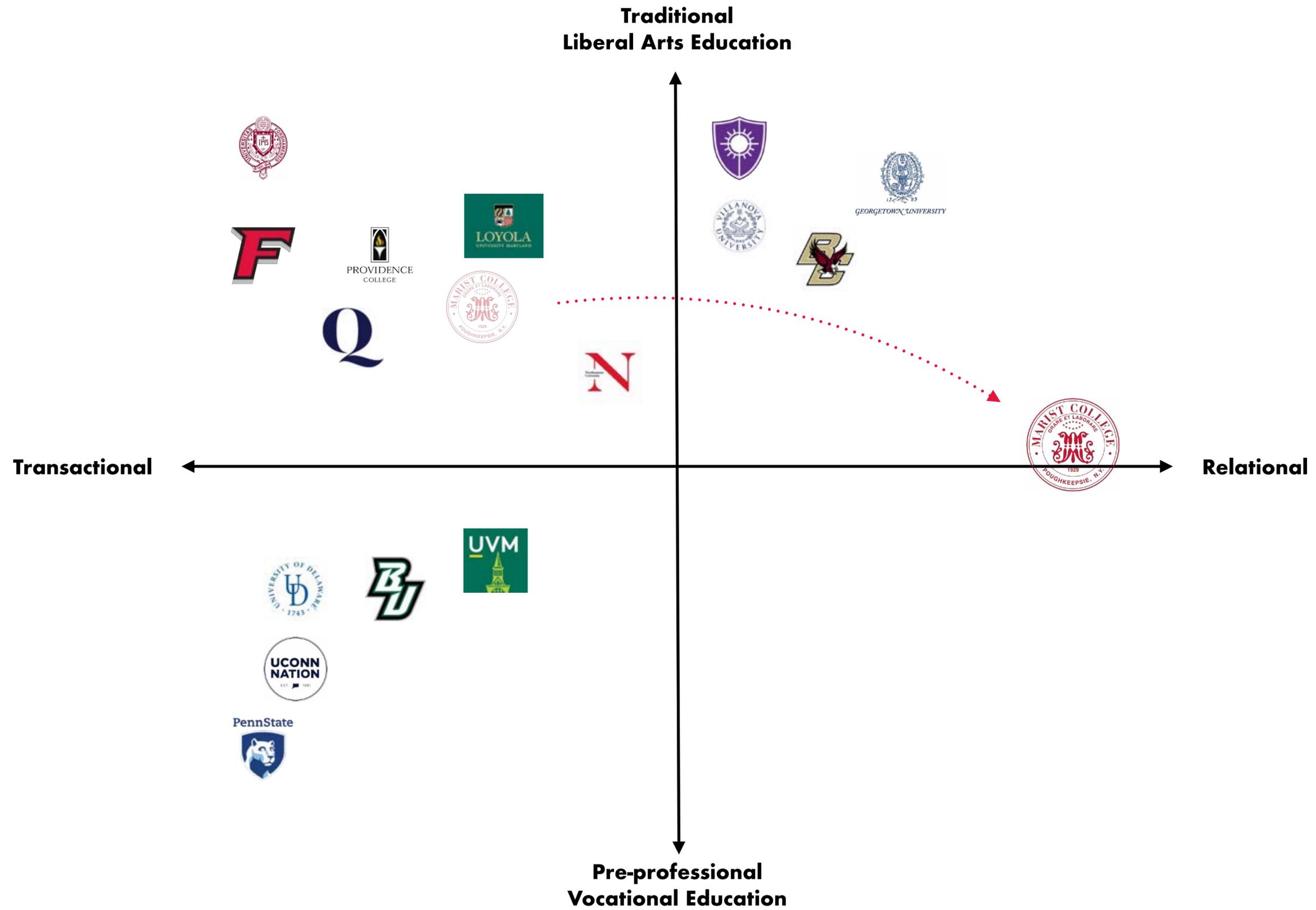
Marist's Secret Sauce:
A Deeply Felt Sense of Commitment

"Marist has that reputation of being a good school, I want to carry that reputation with me. I do want to appear, not only educated but successful, really, in what I'm doing. I would hope that once I graduate, five, 10 years afterwards, people are like, "You were part of the group of students who helped make Marist what it is today." People think that the students that are leaving Marist are not only educated, but just well-rounded good people want to do good and have good values."

• • •

"If you come to Marist, you will always be a reflection of Marist, and Marist will always be a reflection of you. You're going to be representing this place, and we're going to be representing you. We are in a partnership together and it's not four years, it's lifetime."

Marist College:
A Lifelong <u>Commitment</u> To Your <u>Purpose</u>

Dynamics of Commitment

- Enduring
- Future-Focused
- Connected
- Relational
- Socially engaged
- Supportive
- Focused
- Invested
- Action-Oriented

"The two most important days in your life are the day you are born and the day you find out why."

—Mark Twain

Brand Narrative: Lifelong Commitment To Your Purpose

Marist Is Learning For Life

Becoming oneself is a group activity. We encounter the world through relationships. Forming relationships and establishing a sense of community and belonging are inextricably linked to personal and professional development. Encountering people who see us, stick with us, value us and bloom us, effectively mirrors us into being. The impact of our contributions is a direct result of the character and resilience of the communities that we choose to be a part of.

For over a century, Marist College has recognized that the process of personal formation is impacted by the forces of real-world experience, diversity of thought and communal learning. The college's emphasis on radical student centricity, relational pedagogy and social support exposes students to a rarified model of social engagement that encourages students to take risks and awaken to their sense of place and purpose, while being afforded the strength of support that extends beyond academics to the professional realm. Whether studying domestically or abroad at one of the college's international campuses, the felt experience of Marist's lifelong commitment to each and every students' development is indelible.

Marist is learning for life. No matter what age or stage of personal/professional development, learning to successfully navigate life's many transitions demands a fortitude and resilience that can only come from engaging both head and heart. The face of lifelong learning has changed. In the breath's pause between achievements, reflection and reassessment are critical for ongoing formation. Marist's continuing commitment to supporting its students, alumni and faculty in awakening and evolving their sense of purpose is evident in its investment in innovation and curricular flexibility that facilitates students' enduring process of self-directed discovery.

The expectation is that the sense of purpose that is awakened in each student through their Marist experience will be carried forth into the world and actualized through meaningful vocation and contribution to the social good. Becoming a Marist student means being inducted into a passionate network of lifelong learners that support one another personally and professionally. Becoming a participant in this collective achievement in professional risk-taking, personal development and persistent pursuit of purpose is what defines the true value of a Marist education. A commitment to lifelong learning and deeply felt sense of purpose translates to a life lived singularly, supportively, and meaningfully.

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Human Truth:
Emotional Assurance

Cultural Context:
From Transactional to Relational

Point of View:
Personal and Professional formation supported through diversity of thought

Behavior:
Awaken self sufficiency and emotional resilience

Key Differentiator:
Responsive curricular solutions

Organizational Structure:
Connected learning institution

Value Proposition:
A lifelong commitment of support

**Transformation:**
Purpose driven action

Brand Architecture

Brand Positioning Statement

For [target audience] who [target challenge/unmet need], [brand] is [category frame of reference] that provides [main benefit/POD] because [reason to believe].

For Adventurous Upstarts who require emotional assurance in order to take risks, Marist is the scholar-practitioner focused college that provides a lifetime commitment of support for its students' ambitions, because only Marist offers responsive curricular solutions informed by the evolving needs of its flourishing community of alumni, industry partners and students.

Marist Brand Positioning
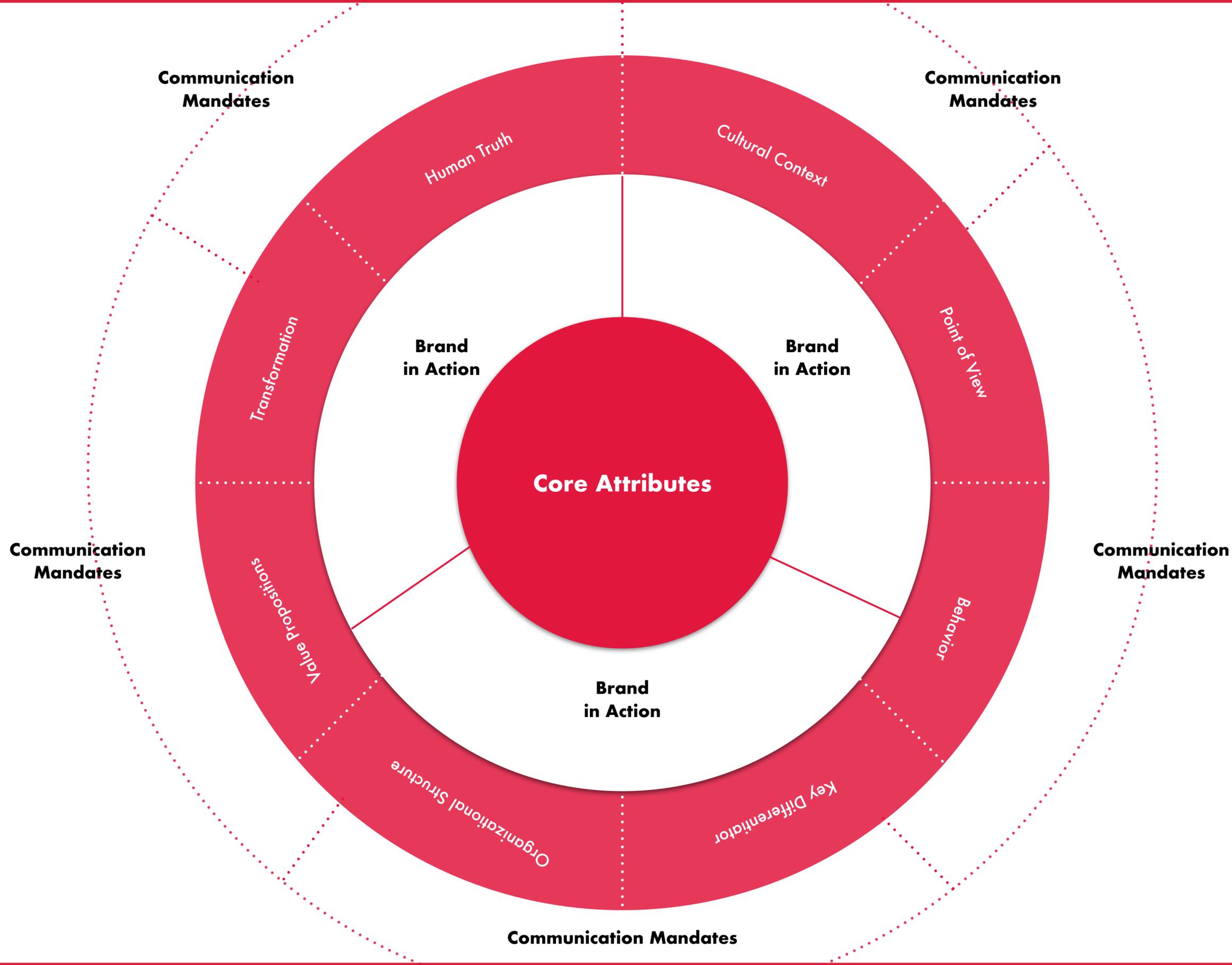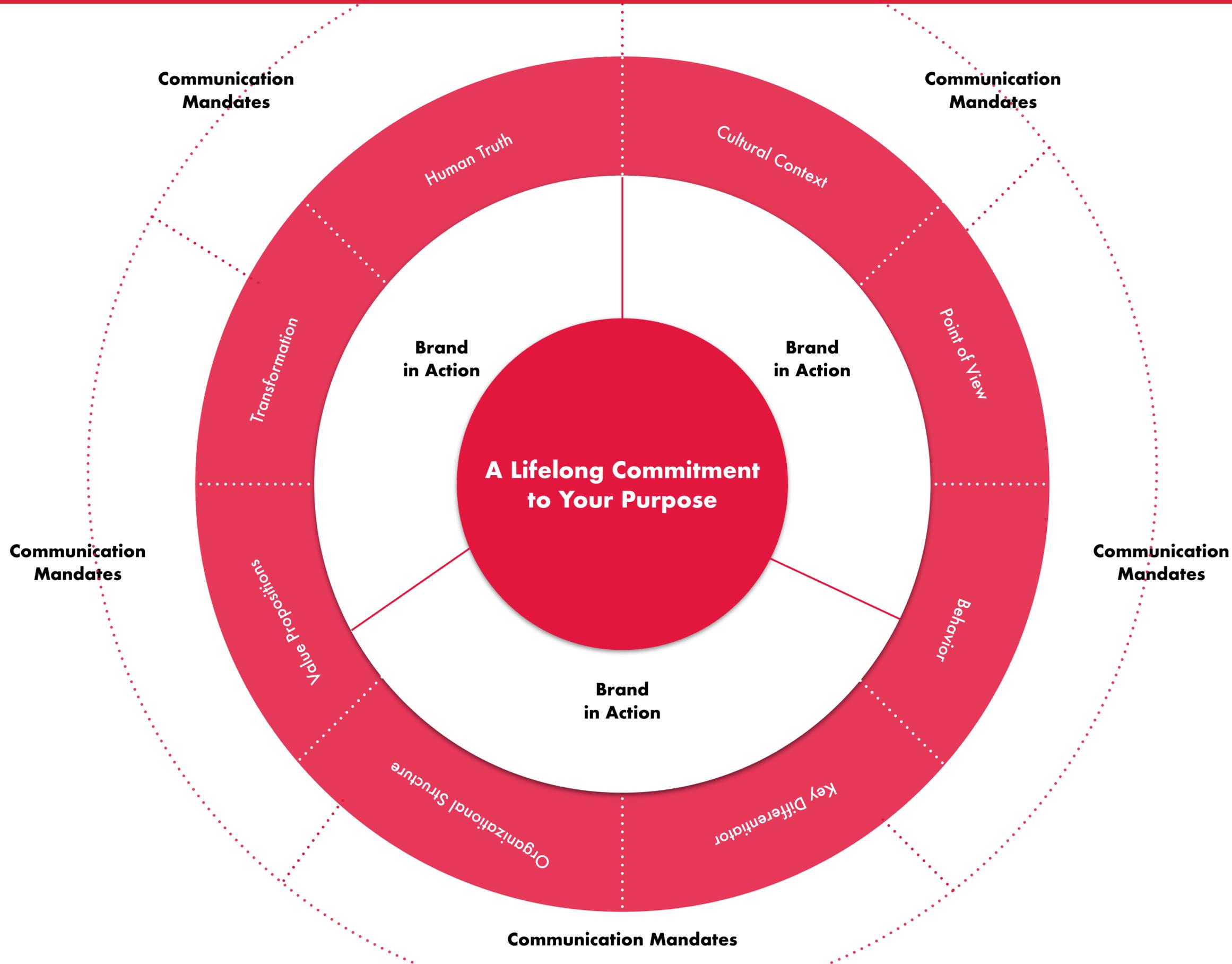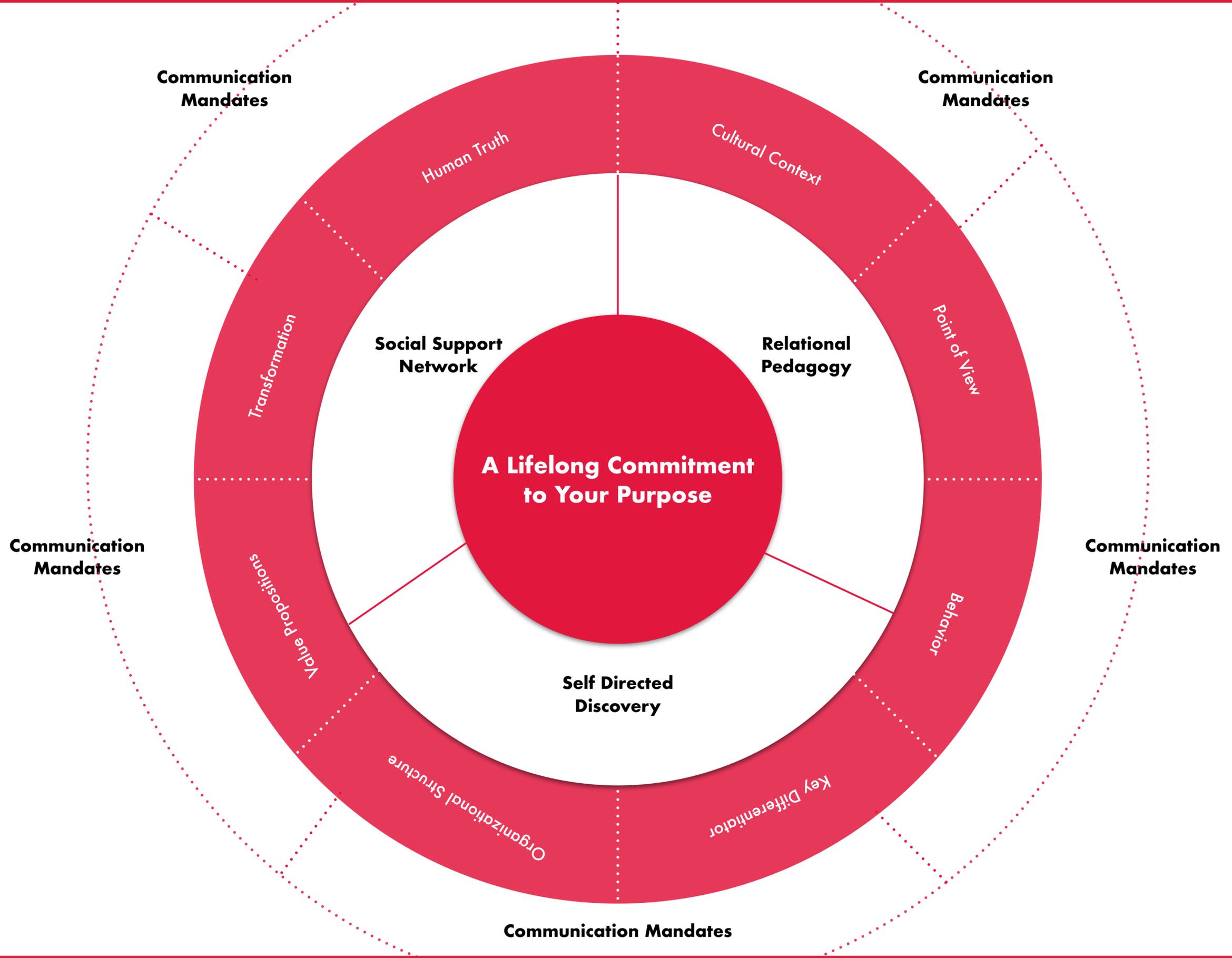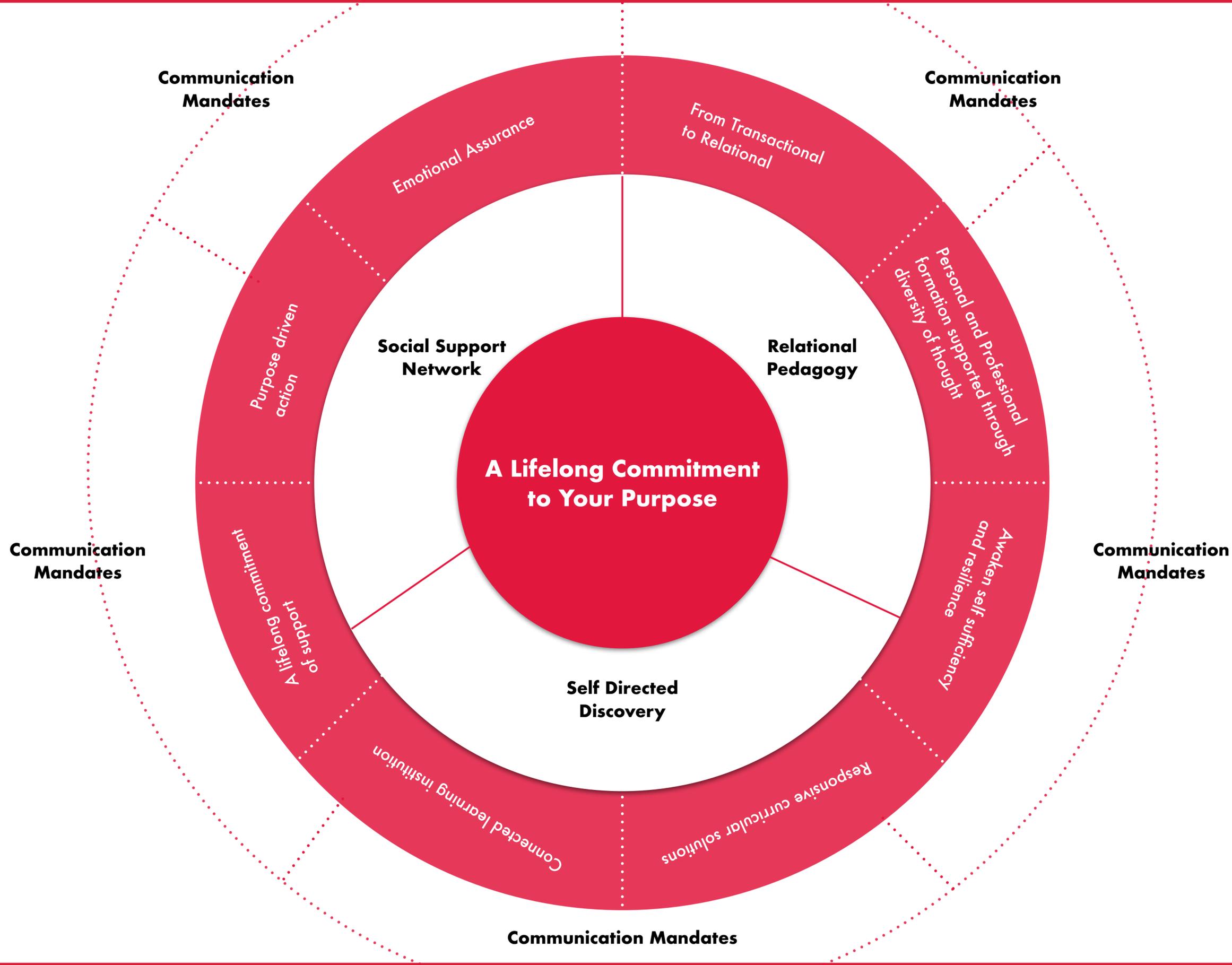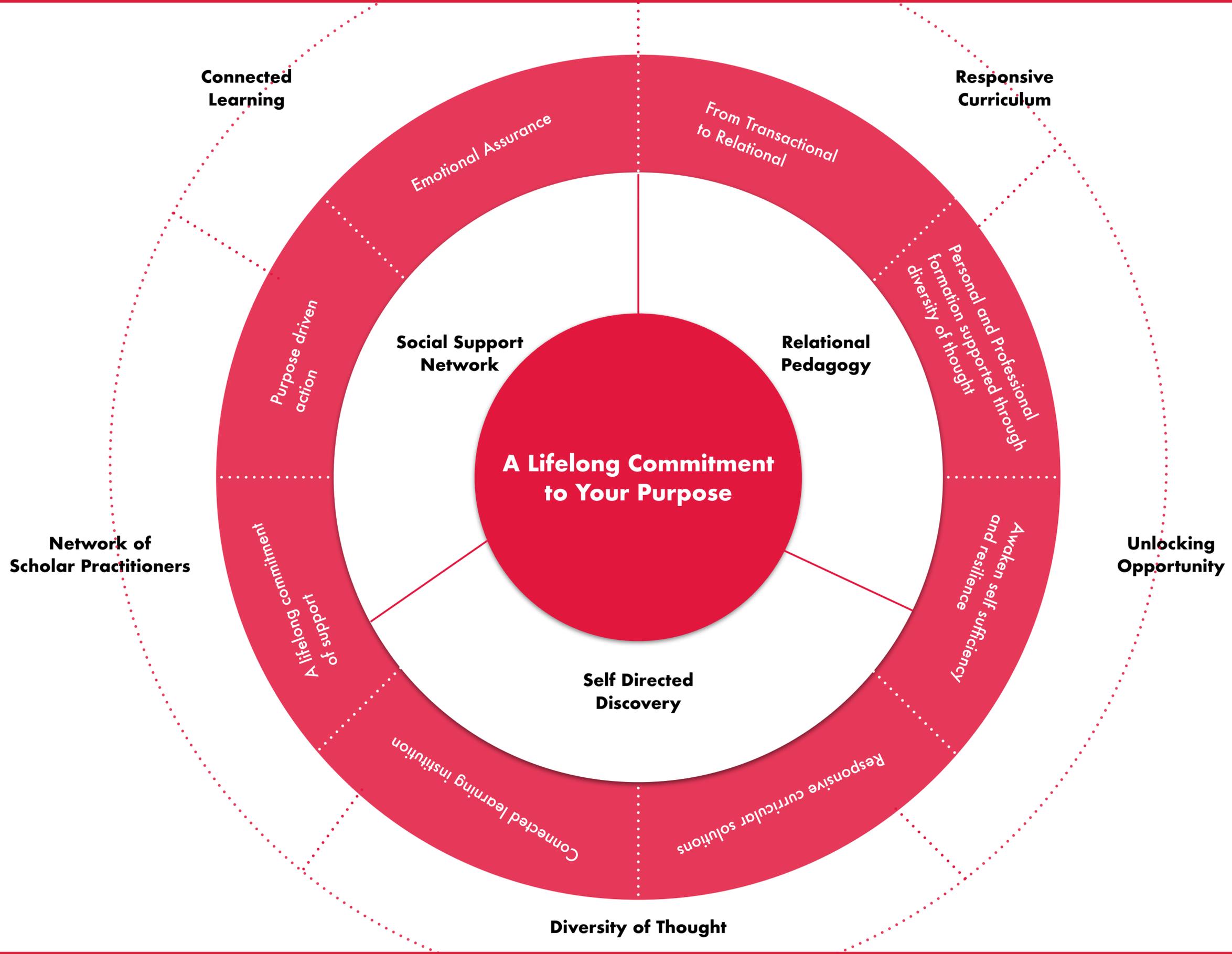
Marist is a pioneering private college founded upon the tradition of the scholar-practitioner model and a leader in connected learning innovation.

Marist Brand "Mission"

Earlier Explorations

Pre-COVID

2019-2015

Silicon Valley Bank
Capco

Silicon Valley Bank (SVB) built its vision and strategy from the ground up through client engagements and internal feedback. Over the years they have experienced strong revenue growth even while investing little in their people or products; and as they continue to grow SVB aims to be the most sought-after financial partner to founders, companies and their investors in the global innovation economy.

The Capco team was focused on two primary objectives: organizational enablement and transforming the digital experience, both informing scalable technology, product designs and services. Our design practice incorporated customer-focused elements, design thinking, rapid prototyping and testing elements of lean startup methodology in a seamless flow from design to agile development. The proposed approach was designed to align with the overall cadence for agile development teams, while ensuring that features were researched, designed and tested several sprints ahead of development. In parallel to digital experience efforts organizational development was also ongoing, creating the foundation for SVB to evolve tools, skills, processes, and culture.

By executing this bank-wide transformation SVB strives to strengthen its growth by offering clients an entire suite of value-added services and seamless digital experiences that complement their financial products.
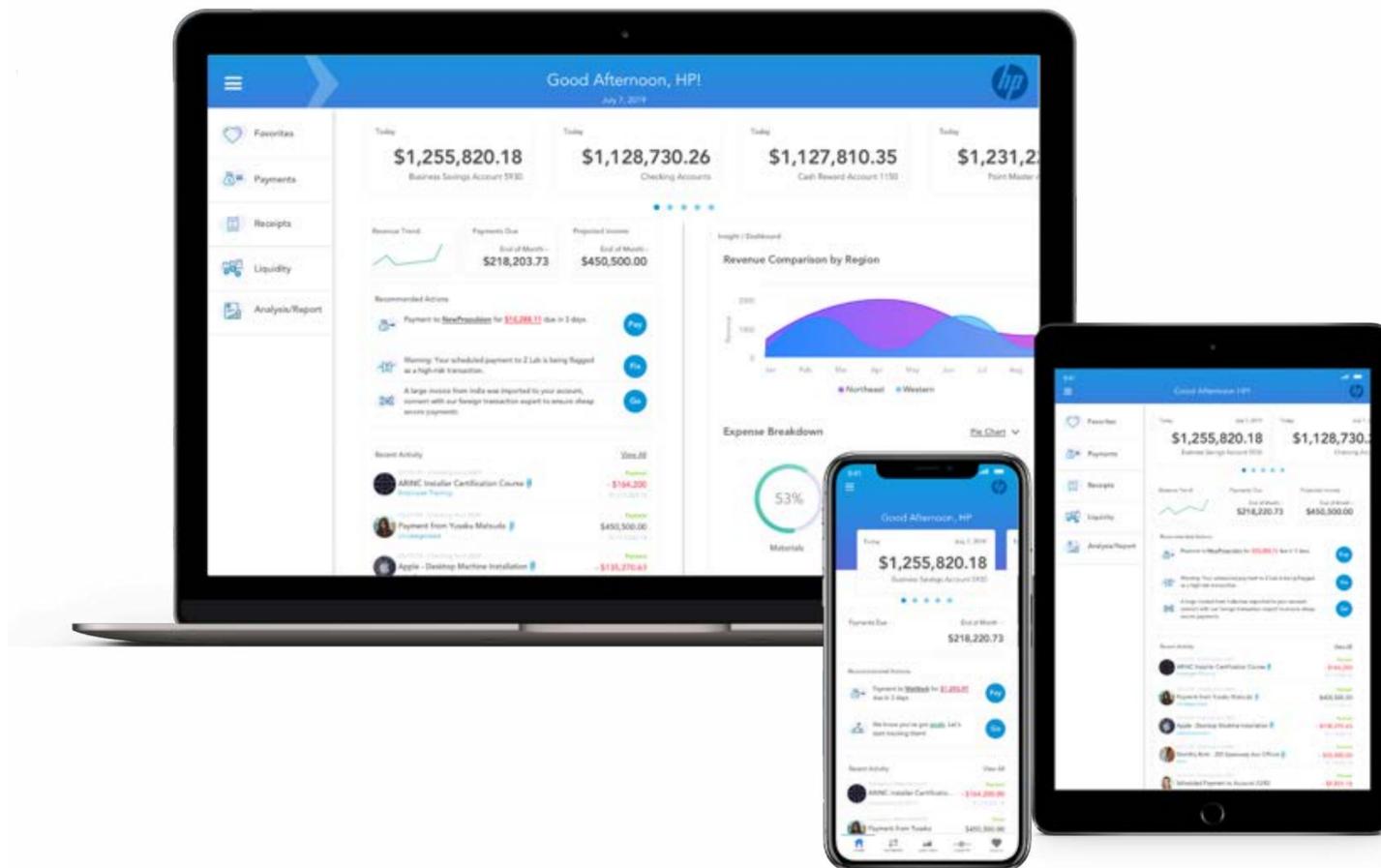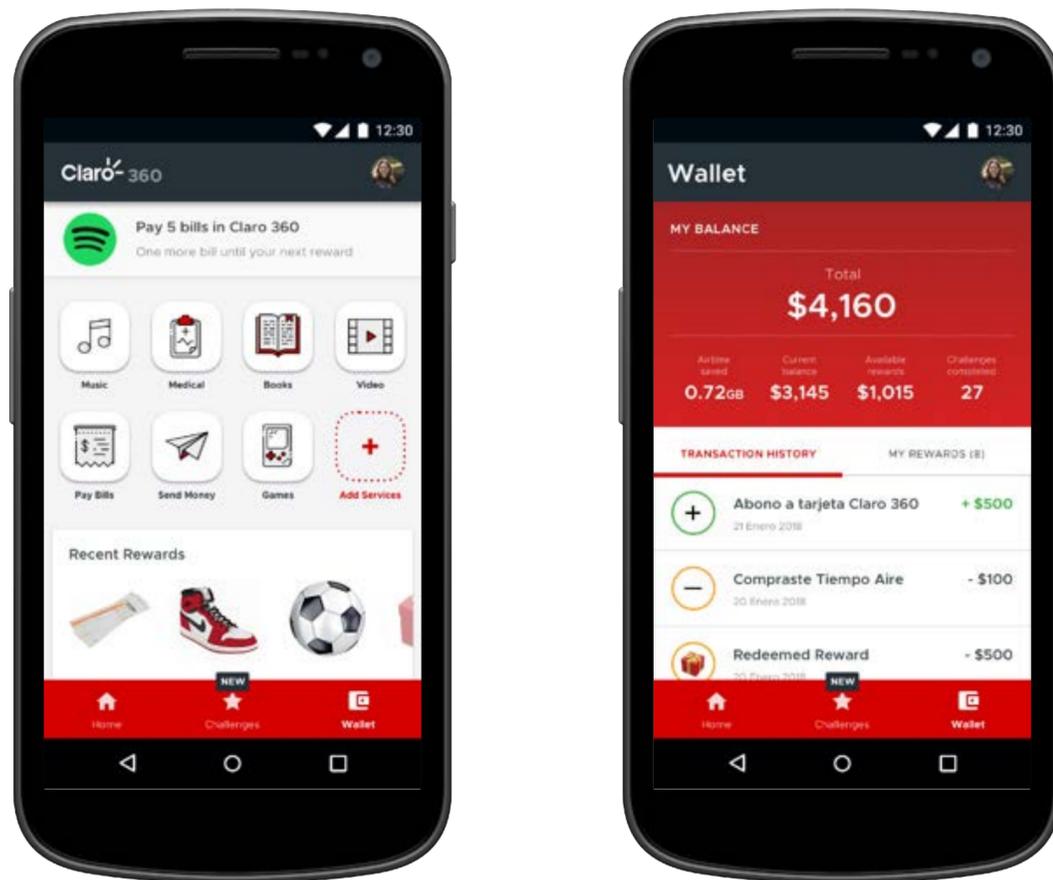
Claro 360
Varius, DMI, Inc

Claro is part of América Móvil, a Mexican telecom group serving 289.4 million wireless subscribers in Argentina, Brazil, Chile, Colombia, Costa Rica, the Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Nicaragua, Panama, Paraguay, Peru, the United States (Puerto Rico), and Uruguay. Claro 360 was designed as a platform service to support unbanked populations in Latin America by creating a credit system based on unused minutes.

Varius and DMI partnered with Claro to concept, design and pilot the first Claro 360 services in Mexico City. Unbanked Mexicans generally distrust banking systems and have opted to remain unbanked over the years. Some of this attitude has been shifting with the convince and transparency of digital. This population sees digital tools and Airtime as a tool for empowerment, one that can help them negotiate more value out of the everyday.

While access to unlimited services was the largest driver for adoption, the greatest incentive to return to the platform at regular intervals was is the ability to make payments for services such as Gas, Electricity and even Airtime itself. Claro 360 introduced a digital economy to over a million people by fostering trust through transparency.
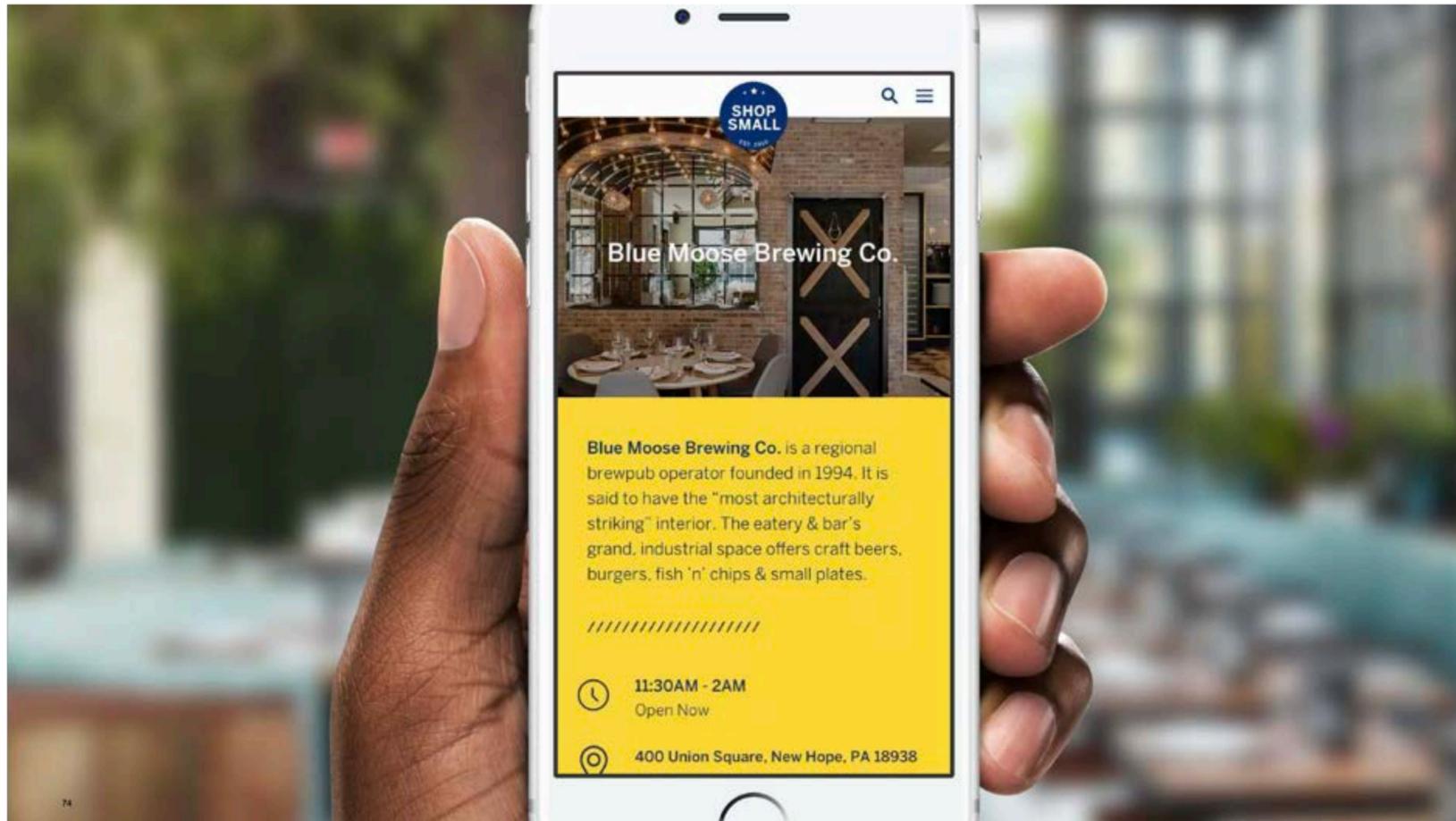
Shop Small, American Express
DigitasLBi

American Express is the proud founder of Small Business Saturday, a day dedicated to supporting small businesses that help create jobs, boost local economies, preserve neighborhoods, and unite communities, online and offline, across the country. As they approach the 10 year anniversary of Small Business Saturday the strategy evolved to create a customer-centric integrated program.

In 2010 consumer confidence in the economy was at a notable low and consumers were managing spend closely, largely overlooking local favorites. Now shoppers are looking for a different shopping experience, one that is worth sharing with others. From personalization on channels, like Facebook, to creating their own maps to reimagining their digital experience, connecting shoppers to small businesses was becoming a local discovery challenge.

Evolving the Shop Small Campaign into an integrated program, started by reimagining the campaign to defining community as inclusive and by fueling new connections in every touchpoint American Express let's SBO's, shoppers and neighborhood champions, alike, unlock the full connected, collective power of the shop small network. The ShopSmall.com website redesign was an integral part of the program's evolution as it synthesizes the Small Business Saturday shopping experience with a system for visual exploration and community.

TRIBECA
FILM
FESTIVAL.

HACKED by DEF CON & Mr. Robot
Tribeca Film Festival

Inspired by film and current events, festival goers were invited to explore and participate in hack-type scenarios to further illustrate the importance of understanding technology, surveillance and digital security within our society.

Sponsored by MR. ROBOT, USA Network's Golden Globe® Award winning series, DEF CON, the world's premier hacker conference founded by information security expert Jeff Moss, returned to the Tribeca Film Festival in April 2016 with their famous Villages, interactive spaces stocked with gear, projects, and brilliant humans. The world of HACKED by DEF CON and Mr. Robot allowed visitors to step into the realm of the hacker. Tribeca Film Institute's partnership with DEFCON and their hallmark of fellowship became an inspirational pillar within the larger hacker program. Village offerings ranged from entry-level talks and film culture tie-ins to immersive hands- on challenges and open-ended experimentation.

In 2016, the initiative was expanded to include fully immersive exhibitions and programs such as the fSociety Recruitment immersive skills based circuit challenge, The Argus Project and Notes on Blindness. In addition the analytical minds of Mr. Robot and Tribeca Film Institute expanded to include conversations which tackled the authentic representation of hacker culture, tools, and techniques within film, TV and on the screen.
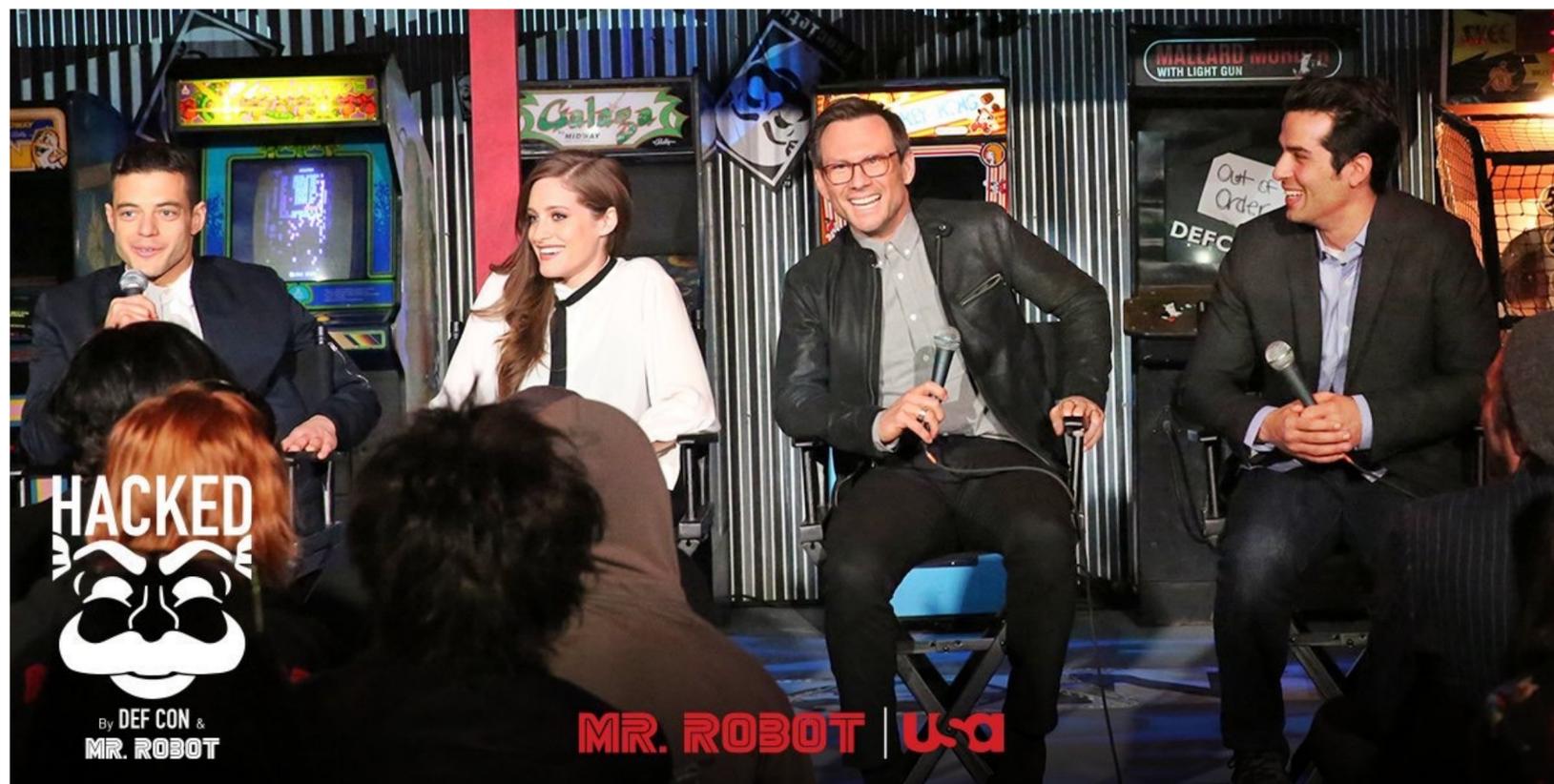
Tire Gauge
Pirelli, Carçula de Pneus

The Tire Gauge is a system designed to measure the tread of tires on a vehicle frictionlessly, requiring no special instructions or precision driving. The Tire Gauge's custom made sensor provides data about displacement within a defined area, using the surface of the ramp as the reference point. The system provides relevant information about the status of the tires to the driver of the vehicle.

A resolution of 0.08 mm, the sensor utilizes an array of 48 minute pins to measure the height of tire patterns from the outside surface of a tire. Based on a spring loaded mechanism, a linear potentiometer registers the distance between two layers of tread as tires push against the array of pins.

If the measured values reaches the defined threshold, the system prints a ticket with the four tire measures, branding and offering a discount in the purchase of new tires. The ticket acts as a call to action through the use of the discounts and a language that reminds drivers of the dangers of driving with worn off tires.

The Tire Gauge can easily be integrated within normal traffic and parking flows and provides the means to measure a large number of vehicles. With logged and properly analyzed data, The Tire Gauge provides a deep understanding of the market and created a competitive advantage for Caçula de Pneus.

Namreta Kumar

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