

stormid

*How to Run
a REAN
Workshop*

What you will need

- 1. A flipchart**
- 2. Post-it notes (enough for each attendee to have at least one pad)**
- 3. Marker pens (one for each attendee)**
- 4. About an hour and a half**

What will happen in the workshop

Part One - Determine the actors

1. Who are the financial actors
2. Who are the business actors
3. Who are the technicians

Part Two - REAN

1. By what methods do you reach users
2. By what methods do you engage with your digital channels
3. By what methods do users activate (i.e. become a leader or customer)
4. By what methods do you nurture leads and customer relationships.

Preparation: Determine the actors

Recreate this template on a new page on the flip chart...

FINANCIAL ACTORS

BUSINESS ACTORS

TECHNICIANS

Determine the actors

1. Who are the financial actors

A financial actor is a decision maker in the business who might withhold or release budget for business activities based on data reported. Financial actors are often director level, usually financial directors or marketing directors. Sometimes they might be CEOs or business owners.

Typically financial actors require overview data, such as overall Return on Investment.

The data they receive helps them justify the financial decisions they make, and helps them to validate the budget requests made to them from the rest of the business.

Work shop task: Mapping the financial actors

Nominate one member of the group list financial actors on the flip chart as the group suggests and accepts who the financial actors in the organisation are.

Discuss financial actors as a group, and list all of those that you can on the flip chart.

This should take about 5 -10 minutes, depending on the complexity of the organisation.

Determine the actors

2. Who are the business actors

A business actor is a decision maker in the business who decides on elements of business strategy, although they might not have the authority to sign off budget (this is the responsibility of the financial actors.) Business actors are often marketing directors or marketing managers.

Typically business actors require overview data, such as overall Return on Investment, coupled with segmented data, such as customer segments, channel data, and day-to-day performance data.

The data they receive helps them justify the strategy they are responsible for, and to make arguments to financial decision makers for additional resources are required.

Sometimes a business actor is also a financial actor (i.e. they determine strategy as well as having budget authority).

Work shop task: Mapping the business actors

Nominate one member of the group to list business actors on the flip chart as the group suggests and accepts who the business actors in the organisation are.

Discuss business actors as a group, and list all of those that you can on the flip chart.

This should take about 5 - 10 minutes, depending on the complexity of the organisation.

Determine the actors

3. Who are the technicians

A technician is anyone in the organisation responsible for executing marketing (and therefore making tactical decisions).

Typically technicians require detailed channel data, such as segmented channel data, and day-to-day performance data.

The data they receive helps execute the prescribed digital marketing channel efficiently, such as optimising performance of channels, or identifying opportunities and threats to performance.

Sometimes a technician is also a business actor (i.e. they execute as well as determine strategy).

Work shop task: Mapping the technicians

Nominate one member of the group to list technicians on the flip chart as the group suggests and accepts who the technicians in the organisation are.

Discuss the technicians as a group, and list all of those that you can on the flip chart.

This should take about 5 -10 minutes, depending on the complexity of the organisation.

Preparation: REAN Diagram

Recreate this empty diagram on a new page of the flip chart...

REACH

ENGAGE

ACTIVATE

NURTURE

REAN

1. Reach

Reach is any method that your organisation uses to reach out to new users.

As we are focusing on new users here, things like email newsletters and so on are not reach methods, as the user must already be signed up to a newsletter to receive it.

Typically, reach methods might include things like PPC ads, radio, TV, print advertising and such like - i.e. places where a user might encounter your brand for the first time.

Work shop task: Mapping the reach methods

The group must work individually and list all of the reach methods they are aware of that the organisation uses to reach new users.

They should write these down on post-it notes, one reach method per note, using a marker pen.

The group should spend no more than five minutes doing this, and there should be no conferring.

Once the five minutes are up, each user in turn should stand up and add their post-it notes to the top left quadrant of our REAN diagram on the flip chart.

***This should
take about 10 -
15 minutes.***

REAN

2. Engage

Engagement describes any action that your users undertake that indicates they are beginning to engage with your organisation.

Visiting the website in itself is not engagement, but navigating to certain kinds of content might be. Additionally, actions such as following on social media or sharing content might be considered as engagement.

Engagement does not mean anything that creates a relationship with your organisation, such as becoming a lead or customer. Therefore, things like "contact us" or "buy now" might not be engagement, depending on their context.

Work shop task: Mapping the engagement methods

Nominate one member of the group to list engagement methods on the flipchart in the top right quadrant of the REAN diagram.

The group should suggest different ways a user might engage, and decide as a group if these suggestions genuinely do represent engagement by a user. Those that the group agrees do this should be added to the list.



***This should
take about 10 -
15 minutes.***

REAN

3. Activate

Activation describes any action that your users undertake that indicates they are forming a potential customer relationship with your organisation.


These actions should be more definitive than those described as engagement. You would be more confident in a user becoming a customer as a result of an activation than from an engagement.

Activation will most likely create some kind of qualified lead, or even a closed customer. Common activations include ecommerce checkout, lead generation forms and such like.

Work shop task: Mapping the activation methods

Nominate one member of the group to list activation methods on the flipchart in the bottom left quadrant of the REAN diagram.

The group should suggest different ways a user might activate, and decide as a group if these suggestions genuinely do represent activation by a user. Those that the group agrees do this should be added to the list.



***This should
take about 5 -
10 minutes.***

REAN

4. Nurture

Nurture is any method that your organisation uses to nurture and maintain good relationships with leads and customers.

By their nature, nurture methods are targeted at existing relationships, but this does not preclude channels where it is difficult to determine a customer relationship, so long as the nature of the activity in that channel is focused on nurture.

For example, TV ads might be a nurture method if the nature of the advertised offer is "existing customers get 25% discount".

Typically, though, nurture methods are commonly through channels that can identify individual users, such as email, social and postal methods.

Work shop task: Mapping the nurture methods

The group must work individually and list all of the nurture methods they are aware of that the organisation uses to nurture existing leads and customer relationships.

They should write these down on post-it notes, one method per note, using a marker pen.

The group should spend no more than five minutes doing this, and there should be no conferring.

Once the five minutes are up, each user in turn should stand up and add their post-it notes to the bottom right quadrant of our REAN diagram on the flip chart.

***This should
take about 10 -
15 minutes.***

What next?

The workshop is now complete.

Thank your attendees, they will have given you a lot of useful information.

After the workshop, review the output and determine:

What reporting needs do each of the actors have. Are there any gaps in the existing reporting that need to be filled, or is existing reporting perhaps not adequately meeting the needs of the actors. Create an action list of how reporting could be improved to meet actors needs.

Are all the REAN methods being accurately and uniformly measured. Create a measurement plan to ensure the reports you generate are accurate, reliable, and true, as well as being a representation of all REAN methods.