

Manifesto for Experimentation

by
Joseph Jaffe



Save to disk [[HELP](#)]



Hide/Show menus

We are living through and operating in unprecedented times—exciting, challenging and anything but stagnant or predictable. Marketing as we know it (or knew it) is undergoing tremendous growing pains, embarking on a rather forced journey of both evolution and revolution from the shores of the status quo to the promised land of the future.

The overarching hypothesis is simple: the world has changed; the consumer has changed; the organization has not. Technology is, or as, change agent. The consumer is changing, but the marketing discipline resists or refuses to change.

The result is a disconnect. A gap. A chasm that has to be bridged.

To be successful, marketing organizations will need to foster and adopt an aggressive and intense culture of experimentation, risk-taking, change management (for communications) and creativity.

Anything less will result in relative business losses, competitive inferiority and inefficient allocation of resources (and therefore sub-optimal return on investment).

In my book, *Life after the 30-Second Spot*, I recounted the following study¹:

Four monkeys were put into a room, where in the center of the room was a tall pole with a bunch of bananas at the top. One by one, each monkey climbed to the top of pole and as they got in arm's reach of the bananas, they were doused with a burst of cold water from an overhead shower to the point where they gave up on their meal and scurried down the pole. After this had happened to each monkey several times, they threw in the towel.

One by one, each of the original four monkeys were replaced with a brand new monkey. As would be expected, the new monkey would start up the pole in search of the prize bananas. As this happened however, the remaining monkeys who had experienced the drenching first hand would pull down the climbing monkey. Soon, all the new monkeys got the message—don't go up the pole.

Ultimately, there were four monkeys in a room who were afraid to climb the pole although not one of them had ever been sprayed with cold water. Put differently, you had a bunch of monkeys all afraid to do anything (to take a risk) but none of them knowing why.

If it's not obvious, the term “monkey” is directly applicable to a media business based on staid assumptions and hypotheses dating back to the ark (or thereabouts). The central currency of measurement is so flawed and outdated, but is accepted “because everyone uses it, which makes it a standard—flawed but a standard nonetheless.” It is the classic story of the monkeys, the pole and the bananas.

¹ A study conducted by Gary Hamel and CK Prahalad as told in “Failing Forward” by John Maxwell.

Someone's going to get rather hungry. Here's one way you can take a risk and try something different:

The Four Key Principles to Changing the Status Quo

1 An **Experiment** is a set of actions and observations, performed in the context of solving a particular problem or question, to support or falsify a hypothesis or research concerning phenomena. The experiment is a cornerstone in the empirical approach to acquiring deeper knowledge about the physical world.

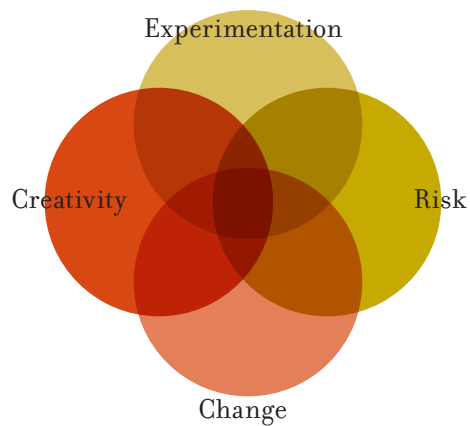
2 **Change**, the quality of impermanence and the flux, has had a checkered history as a concept. In ancient Greek philosophy, while Heraclitus saw change as ever-present and all-encompassing, Parmenides virtually denied its existence. Ovid produced a classic thematic handling of change as metamorphosis in his *Metamorphoses*. Change may require organisms and organizations to adapt (see also evolution).

3 **Creativity** (or **creativity**) is a mental process involving the generation of new ideas or concepts, or new associations between existing ideas or concepts. Unlike many phenomena in science, there is no single, authoritative perspective or definition of creativity. Unlike many phenomena in psychology, there is no standardized measurement technique. This mysterious phenomena, though undeniably important and constantly visible, seems to lie tantalizingly beyond the grasp of most people.

"Creativity, it has been said, consists largely of re-arranging what we know in order to find out what we do not know." ~George Keller

3 Risk is the potential harm that may arise from some present process or from some future event. In everyday usage, “risk” is often used synonymously with “probability”, but in professional risk assessments, risk combines the probability of a negative event occurring with how harmful that event would be. Financial risk is often defined as the unexpected variability or volatility of returns, and thus includes both potential worse than expected as well as better than expected returns.

Sources: Wikipedia



Mashing-up the definitions of the four key principles (experimentation, risk, change and creativity), several key insights present themselves:

- ~ Experimentation is a process, or solution, required in order to solve a particular problem (which may or may not orbit around a particular hypothesis and/or quest for further knowledge).
- ~ Experimentation may also help to support or refute hypotheses, which may or may not be grounded in fact, conjecture, speculation, gut feel and/or intuition.
- ~ The need for—or existence of—change hinges around the ability and importance to adapt and evolve. It is both a survival instinct and part of natural selection.
- ~ Dating back to its very origins, there have been divergent opinions regarding change. From an organizational perspective, it's either going to be part of a company's core DNA or it isn't. That doesn't mean the company cannot learn to adapt over time.

- ~ Creativity strives to achieve a duality of “productivity” and “originality”—in other words new approaches to achieve an old objective
- ~ The very definition of creativity implies zero precedent and thus from a categorization or classification standpoint is elusive when it comes to compartmentalization and standardization
- ~ Risk taking is largely regarded as a negative act, with a commensurate opportunity cost associated with the downside of making a mistake, when in fact it should be looked at and evaluated as such, as a positive, constructive and progressive necessary investment

Put it all together and a new value proposition emerges.

To solve new and existing challenges associated with—but not limited to—the evolution and revolution of inevitable change, volatility and flux, organizations need to adopt new, unique, original, creative and/or different approaches.

This process through which these approaches are qualified, prioritized and activated is called “new marketing experimentation” and it is defined as the systematic and calculated ability to take risks, make mistakes and implement unprecedented solutions on a concurrent cultural, organizational, strategic and tactical basis.

Why the need for experimentation? Why now? The need for a new solution presupposes an existing composite problem that today includes any/all of the following imperatives:

- ~ keeping up to date with a fast-moving consumer that continues to harden and push-back against marketing messaging increased opportunities to skip, eliminate, fast forward or ignore marketing messaging an ever fragmenting marketplace with an ever proliferating subset of touchpoints and/or empowering choice an explosion of clutter both inter-content (ad messages) and intra-content (product placement)
- ~ hyper-competition amidst an ever *flattening* global landscape.
- ~ amplified need for measurability and accountability (ROI)

The model is broken:

- ~ It's not consumer-centric.
- ~ It has unacceptable levels of wastage built into it
(What is an index? Buying demographics on an index is just making the best of a bad situation.)
- ~ There is too much clutter.
- ~ It suppresses creativity.

“It’s what I’ve never seen before that I recognize.”

Photographer Diane Arbus

Consumers are the same. As long as we continue to expose them to the same old-same old, they will continue to ignore us and get better at obliterating us from their lives.

Take your kids to a restaurant and the waitress brings over the ubiquitous 3-pack of crayons: red, yellow, blue—the three primary colors. If you think about it, there’s an easy leap to media: red, yellow, blue: television, radio, print. Except that today, Crayola has their Big Box, containing 96 colors.

Are you still coloring in 3 colors?

Do you begin with the default 3-pack or do you treat each color equally?

Are you fully exploring the complete range of colors, with the full spectrum of permutations, combinations and possibilities?

Do you have a process in place to evaluate and select the variety of opportunities?

Putting it all together leads to a cohesive, integrated and measurable plan of action

10 critical components/insights to internalize and help you on your journey:

1. You can't be half-pregnant. Experimentation (like the word "test") is not about a half-hearted commitment. It's not about using negligible, leftover dollars...which ultimately puts too much pressure on a siloed and tactical one-off to over-perform disproportionately against existing efforts.
2. Call in the experts. If there's one thing worse than not experimenting, it's experimenting poorly. Fake blogs (frogs), contrived and controlled environments, overly moderated forums for expression and creation, inability to respond in a hyper-timely fashion are all common mistakes.



THE 4 LAYERS AND LEVELS OF EXPERIMENTATION



a new marketing company

3. Swim upstream—Tactics in search or absent of strategy are no better and no worse than the status quo. The earlier in the process the discussion and evaluation of alternatives and the more aligned to brand and strategic equity, the better the chances of success.
4. Strive toward implementing an integrated plan in which your experimental components are allowed to feed off all possible opportunities and touchpoints, in which your untried and untested alternatives are allowed to flex their true potential.
5. Develop fluid and non-linear processes to allow a dynamic and opportunistic planning and development process. Find a balance between Fire-Ready-Aim and laborious and drawn out conceptualization and ideation. Embrace a process where everyone is involved and allowed to contribute—and that of course means consumers as well as every department of your organization. Reject territorialized and compartmentalized hierarchies and fiefdoms.
6. Cultural Buy In—This is critical and cannot be accentuated and emphasized enough. There has got to be buy-in from the highest level and a commitment to aggressively upping the spending/budget allocation based on results.
7. Measurement—Nothing escapes without a layer of evaluation. Be sure to spend consider time developing key metrics and fair evaluation criteria in order to fully encapsulate the benefits and pitfalls of your plan. Remember: Lessons learned—whether positive or negative—are equally valuable. Depending on your level of risk, you might even want to err on the side of qualitative “proof of experiment” above quantitative. Handicapping your experimentation may be exactly what you need to help move from embryonic to independent status.

In order to get the right answers, you need to ask the right questions.

8. Trust your gut—and trust that your competitors are keeping their successes close to their chests. This is about doing the right thing—this is about truth—and you **will** know when you're on the right path or not (and rest assured, your consumers are only too happy to help you back on the path should you stray...).

9. Be responsive, be humble, be open to co-creation and open-source contributions from freelancers, bloggers, consumers. You will get feedback (whether you like it or not)—you will get a lot of feedback. Make sure you respond. Build in processes where you reward contributions with a combination of Fame (recognition) and Fortune (compensation).

10. Be prepared to make mistakes (embrace your ability to strike out). This may seem disingenuous, but it's not. There's no way you're going to hit the ground with a "Hall of Fame" ratio of hits: misses. Facilitate a culture, in which bold decisions are made by risk-inclined teams. This is not a license to let loose with a series of "Hail Marys", but an earnest attempt at encouraging a culture of change, in which the brand is continuously mixing it up and adapting to the dynamic and organic environment in which it lives and breathes.

“Safe advertising is the riskiest advertising of all.”

Bill Bernbach

As laid out in *Life after the 30-second Spot*, here is a 5-pronged process for discovering, embracing and living an ethos of experimentation.

R	Reject the Status Quo	Commitment
E	Embrace Change and New Marketing (the 93 colors)	Discovery and Audit
A	Accept a Higher Level of Accountability	Evaluation and Measurement
C	Challenge Yourself/Your Partners to Adapt or Die	Expectation Setting and Risk Management
H	Hire/Train like There's no Tomorrow?	Hiring/, Training, Closed Loop Learning

Making Experimentation a Reality: A 5-Step Plan

The following is a 5-step guide towards determining an experimentation roadmap or path forward:



Organizational Structure

Experimentation should not be charged to any existing internal or external partners. Anyone with an existing mandate, with a day-to-day portfolio that is tied-to and grounded to short-term metrics and/or deliverables, is going to be biased, clouded or at the very minimum distracted.

SPECIAL TEAMS VERSUS BLACK OPS

Experimentation is best conducted by a separate(d) team; a nimble, independent, empowered and intense group of individuals that report straight to the top.

Depending on your anticipated level of risk and comfort level, this team could be assembled as a Delta Force or Black Ops group... unaccountable throughout but ready and prepared to pay the ultimate price upon failure.

SOURCING YOUR DELTA FORCE

- ~ Model 1: Internal Existing (a mash-up of individuals from various internal departments)
- ~ Model 2: External Existing (a mash-up of individuals from various partners/agencies)
- ~ Model 3: External Specialists (a company specializing in experimentation/new approaches)
- ~ Model 4: Mash-Up (a taskforce consisting of a combination of the above 3 alternatives, led by an external specialist—individual or team)

REPORTING STRUCTURE

Your experimentation team will report to the Chief Executive Officer, Chief Marketing Officer or appropriate counterpart.

AN INTEGRATED SILO

The ideal experimentation team remains separate (in terms of autonomy and independence) and yet connected (in terms of integrated and holistic) to the organization. It is integral (and should be self-explanatory) that the ideal Special Teams will interface regularly with the day-to-day departments in order to execute “experiments with context”.



Process

If experimentation is like the systematic tossing of pasta against the wall to see if it sticks and is al dente, then there had better be a recipe in mind to cook up a storm or there's going to be a hell of a mess left over.

Butchered mixed metaphors aside, you're going to need to “connect the dots” and put it all together with some kind of a structure and process that will help imbed and integrate the experimentation imperative into the very fiber and DNA of the organization.

You'll need a solution in place that helps you do the following:

- ~ determine which brands are regions and right and ripe for experimentation
- ~ set the intensity level of experimentation in terms of budget/sufficiency commitment (q) against number (x) of experiments over a defined time period (y), as well as some kind of multiple (z), which will allow you to scale and step up accordingly
- ~ evaluate WHICH experiments should be utilized in which order
- ~ choose your rules of engagement against which all key constituencies sign off
- ~ find evaluation/measurement criteria to determine efficacy and key learnings/insights
- ~ establish knowledge management methodology to help capture and share “different practices”

Put simply, experimentation without purpose, overarching objectives, defined metrics, organizational structure/process and cultural buy-in will inevitably run out of steam and momentum and will run the risk of being marginalized or minimized from a priority, investment and commitment perspective.

Experiment or be experimented on.



Allocation/Investment

Yesterday (circa 2005): What percentage of my budget should I allocate to Interactive?

Today (circa 2006): What percentage of my budget should I allocate to Search or Video?

Tomorrow: What percentage of my budget should I allocate towards Experimentation?

Unless you're Neil Armstrong, you're not going to achieve exponential results by taking incremental steps.

There is some precedent BUT we are in uncharted territory here. Can you imagine Christopher Columbus asking for a map before embarking on his discovery of America?

How much should you be spending on Experimentation? Via triangulated anecdotes*, that number is in the low-to-mid 20%'s.

** Sources: Blackfriars Communications and McKinsey Reports*



Categorization

What should you be experimenting ON?

Layer 1: Tweaking the existing paradigm (Communication)

Applying new/non-traditional techniques to existing/traditional approaches/media. Example: KFC's hidden coupon code in a 30-second spot which was only visible in slow-motion mode (and ultimately via the Web)

Layer 2: Deploying a new paradigm (Conversation)

Incorporation of new techniques, approaches and alternatives. Simply put—using an approach you've never used before. Example: V.O.D. or Social Media (Blogs, Podcasts etc)

Layer 3: Creating a new paradigm (Transformation)

This is “Windows Registry” territory (proceed with an experienced guide, with caution and at your own risk), namely focusing on your business model, your overall and overarching relationship with your consumers, going beyond media, communication and even conversation into a “transformation” or innovation space.



Evaluation/Measurement

A. Timeframe

Overheard in the halls of an advertising agency: *“Staffer 1: This stuff is hard; it’s too complicated. I’ve been doing the same thing for 20 years; all I want to do is just see out the next 3 years and then retire.” “Staffer 2: “Don’t you understand?, By embracing [new marketing], you’ll keep your job for the next 3 years”*

THE 3-YEAR* PLAN:

One suggested path forward is to put together and execute a phased 3-year plan that is focused on installing and integrating a systematic process geared around experimentation into the very core of the organization.

Said process would follow a “focused chaos” methodology, i.e. being clear and rigorous on managing expectations, ascertaining the real ROI (learnings, metrics, insights), integrating programs into the larger “mother ship” and ultimately closing the loop on each iteration in order to evolve, improve and innovate on the next go-round.

In other words, managing expectations through an appropriate investment of time, money, energy and efforts (together with cultural and corporate buy-in) over a sustained period of time.

** 3 years is a placeholder. Your optimal timeframe will be directly influenced by your category, corporate culture, objectives, business cycles and propensity or openness to change*

B. R.O.E.

Short term (more direct response oriented) goals should not overpower and cloud the real reasons why you are experimenting in the first place. Your goal is to learn. Your goal is to learn (and learn from your mistakes) before your competitors do. Your goal is to move on to the next level/experiment when your competitors are making the same mistakes you made long in the past.

Instead of a linear and binary “traditional” R.O.I. focus, employ a R.O.E. layer of evaluation: Return on Experimentation.

This is an opportune time to put flesh and directional guidelines around both new metrics (such as time spent, engagement, influence, organic referrals, behavioral shifts, etc), as well as more qualitative and sometimes intangible gauges of success, including—but not limited to—buzz, press coverage, relevance, resonance, motivation (internal), etc.

Do It While You Can Before You Have To

Those were nine words of wisdom spoke to me at a conference in Toronto by a fellow blogger and new marketing evangelist, *Kate Trgovac*.

The bottom line is that you simply cannot afford to be in the chasing pack (the ones that *have to*). You need to be in the *while-you-can* clan. You've been given an unprecedented array of bold, new approaches, alternatives to the tried-and-tested, and arguably staid mainstream outlets.

Along the way, you're going to make mistakes—plenty of them—but make sure you make the *good* kind of mistakes, as opposed to the *bad* kind.

Good mistakes are the kinds of mistakes you learn from, the kind you get smarter from as a result, the kind that you'll be making before your competitors and when they get around to make the same mistakes, you'll be way ahead...possibly making new mistakes, but probably not. Bad mistakes are the kind that leave a lasting stain, the kind that may very well poison the waters for future drinking, the kind that you simply cannot afford to make.

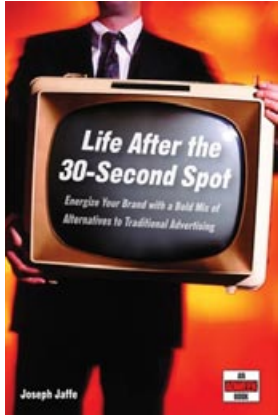
So how does one differentiate or determine how to make the *right* kinds of mistakes? This is the “art” and expertise aspect of the new marketing experimentation equation.

With a nod to Monopoly, your options are characterized by a mash-up of risk and return, which spans the full gamut of success and failure. The point of this article is that there will be two phases of new marketing investment, hallmarked against the two types of mistakes (see chart below).

	WHEN YOU CAN	WHEN YOU HAVE TO
Good Mistakes	Free Parking	Just visiting
Bad Mistakes	Get out of jail (relatively) free	Go to jail

At the end of the day, it really comes down to the importance you're placing, or will place, on the various change elements associated with the business and brand building worlds, the ever-increasing challenge of reaching-connecting-effecting today's elusive, marketing-weary and increasingly empowered consumers and the ability to utilize and incorporate these approaches in order to stand out, resonate and convert.

Whether you look at it from a tactical (blog, podcast, consumer-generated content, gaming, virtual world, etc.), strategic (experience, permission, involvement, conversation), organizational (process, non-linear responsiveness, fluid contingencies) or cultural (part of the company's DNA, the 360-commitment across every single internal or external constituency or touchpoint; R&D; innovation) perspective, you control your future. If you truly believe that the health, growth and prosperity of your brand will pivot around the extent to which you are able to seize and capitalize on the limitless possibilities out there, then it comes down to **when** you're going to do something while you can, rather than when you have to.



BUY THE BOOK

For more details or to buy a copy of Joseph Jaffe's, *Life After the 30-Second Spot*, [click here](#).

ABOUT THE AUTHOR

One of the most sought-after consultants, speakers and thought leaders on new marketing, Joseph Jaffe is President and Chief Interruptor of crayon, a new marketing company (www.crayonville.com). crayon is a mash-up of 5 key areas: strategic and creative agency services, consulting, M&A Advisory, thought leadership/custom publishing, and finally training/education. crayon's initial clients include The Coca-Cola Company, GSD&M and SpiralFrog.

Prior to launching crayon, Joseph ran jaffe, LLC, where he worked with companies including P&G, The Coca-Cola Company, American Airlines, Dunkin' Brands, TiVo, Motorola and Fox Interactive Media. Before that, Joseph was Director of Interactive Media at TBWA/Chiat/Day and OMD USA, where he worked on Kmart, ABSOLUT Vodka, Embassy Suites and Samsonite.

Jaffe's popular blog, "Jaffe Juice", provides daily commentary on all things new marketing. You can join the conversation at www.jaffejuice.com. He also hosts a weekly new marketing podcast called "Across the Sound", recently voted a Readers' Choice Award as "Best Marketing Podcast" by MarketingSherpa.

His first book, *Life After The 30-Second Spot: Energize Your Brand With A Bold Mix Of Alternatives To Traditional Advertising* (Wiley/Adweek) was released in June 2005 and focuses on how advertising is evolving in a world ruled by an empowered consumer and no longer governed solely by the 30-second spot.

Joseph is a Senior Fellow at the Center for the Digital Future at the USC Annenberg School and he has also lectured part-time at NYU's Stern School of Business, Cornell's Johnson School of Business and Syracuse University.

Hailing from South Africa, he lives with his wife, daughter and son in Westport, CT.

Arguably the best place to begin your search is with search (engines), as well as the rich blogosphere, podosphere and social mediasphere in general.

- ~ The Blogosphere—Jaffe Juice (www.jaffejuice.com)
- ~ The Podosphere—Across the Sound (www.acrossthesound.net)
- ~ The Bookosphere—Life after the 30-second spot (Amazon.com)

DOWNLOAD THIS

This manifesto is available from <http://changethis.com/30.06.Experimentation>

SEND THIS

Click here to pass along a copy of this manifesto to others.

<http://changethis.com/30.06.Experimentation/email>


SUBSCRIBE

Learn about our latest manifestos as soon as they are available. Sign up for our free newsletter and be notified by email. <http://changethis.com/subscribe>


WHAT YOU CAN DO

You are given the unlimited right to print this manifesto and to distribute it electronically (via email, your website, or any other means). You can print out pages and put them in your favorite coffee shop's windows or your doctor's waiting room. You can transcribe the author's words onto the sidewalk, or you can hand out copies to everyone you meet. You may not alter this manifesto in any way, though, and you may not charge for it.

NAVIGATION & USER TIPS

Move around this manifesto by using your keyboard arrow keys or click on the right arrow (→) for the next page and the left arrow (←). To send this by email, just click on. 

HAVING PROBLEMS SAVING TO DISK?

First, make sure you have the latest version of Acrobat Reader 6 which you can download from <http://www.adobe.com/products/acrobat/readstep2.html>. If problems persist, it may be due to your Acrobat Reader settings. To correct the problem (for Windows), a reader, J. Hansen, suggests going to your Acrobat Reader Preferences > Options > Web browser Options. Check the "Display PDF in Browser" option. Then click on Save to Disk. 

KEYBOARD SHORTCUTS

	PC	MAC
Zoom in (Larger view)	[ctl] [+]	[#] [+]
Zoom out	[ctl] [-]	[#] [-]
Full screen/Normal screen view	[ctl] [L]	[#] [L]

info



BORN ON DATE

This document was created on January 9, 2007 and is based on the best information available at that time. To check for updates, please click here to visit <http://changethis.com/30.06.Experimentation>.

COPYRIGHT INFO

The copyright in this work belongs to the author, who is solely responsible for the content.

This work is licensed under the Creative Commons Attribution–NonCommercial–NoDerivs License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc-nd/2.0/> or send a letter to Creative Commons, 559 Nathan Abbott Way, Stanford, California 94305, USA.

Cover image from www.istockphoto.com

ABOUT CHANGETHIS

ChangeThis is a vehicle, not a publisher. We make it easy for big ideas to spread. While the authors we work with are responsible for their own work, they don't necessarily agree with everything available in ChangeThis format. But you knew that already.

ChangeThis is supported by the love and tender care of 800–CEO–READ. Visit us at our main site www.800ceoread.com or at our daily blog <http://800ceoread.com/blog/>.