

More efficient, more effective, more difficult to beat: Activating brand to make the leap from Product to Platform

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[This JumpGuide details how to build your brand into an asset that helps you make the leap from Product to Platform.](#)

Brand—the underleveraged growth tool

In the course of company-building, brand is too often viewed as a one-size-fits-all proposition without consideration for a company's stage, resources, and maturity. This leads many CEOs to under-invest in brand, ultimately risking defensibility, growth, recruiting, team cohesion, velocity, and market share. (Do we have your attention yet?)

Yet, when activated appropriately for your stage of growth, brand becomes a framework for decision making at scale that delivers less swirl, less burn, and less wasted reps. (And who doesn't want that?)

A quick definition of what we mean by “brand”

“Brand” can be broken down into three components that must change as your org evolves and grows:

01. Brand defines... How you* think

This is the mental model that runs the business. It defines what you're selling, who you're selling to, and who your competitors are. Leadership defines this thinking, but its job is to give each team member the clarity needed to make decisions that amplify the trajectory of the business, efficiently.

**that's the royal you*

02. Brand informs... **How you behave**

This is how you show up in the world. Internally, this means brand informs what you build (product), who you hire and how you treat one another and your customers (culture), and how you go to market (GTM).

03. Brand is reinforced by... **Your systems**

This is how you drive cogency and impact with your platform brand. As your organization uplevels, this is about the skills and capabilities that are needed to execute at scale.

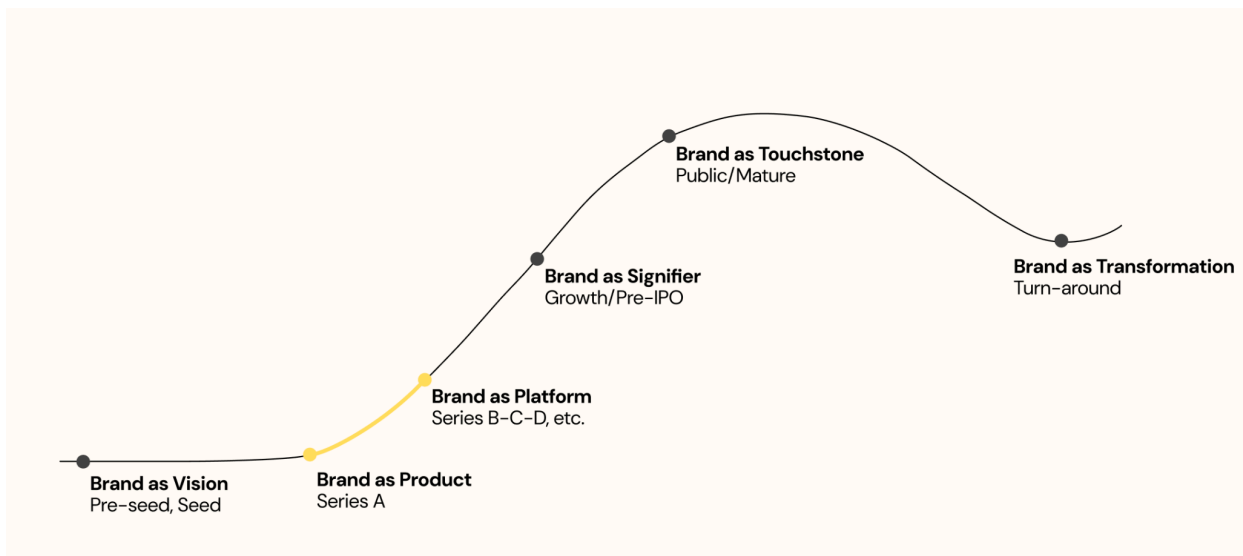
This jumpGuide focuses on how to activate each of these three elements as you move from Product to Platform.

Enter Brand x Stage

You're a CEO. You know that many aspects of company-building are unpredictable but brand building doesn't have to be one of them.

The Brand x Stage framework is designed to demystify and de-risk the role of brand as a company-building tool so that you can feel confident allocating the right resources at the right time in the right places with the right people.

After two decades of brand building, we have identified six knowable moments of transition where a right-sized brand delivers outsized results:



The Product to Platform moment

Commonly, a “platform” is 2+ related products that enhance one another. The function of brand at this stage is to fundamentally alter the trajectory of your business by tying your disparate products together in a way that both clarifies and amplifies the value that you deliver. Often, this means you need to rebalance the relationship between your products in order to make space for a brand idea that connects them.

A platform brand often manifests as category creation, though it may also mean leaping ahead of the competition within an established category.

For those who still don’t believe in “brand,” it’s probably important to mention that when you get this right, it often leads to:

- Increased LTV
- The ability to demand a price premium
- A clearer, more cogent path to growth
- Greater efficiency in selling to new audiences
- Less internal conflict (by a mile)

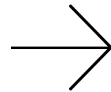
This looks like the below shift:

From:

Brand as

PRODUCT DIFFERENTIATION

“We do X better than anyone else.”



To:

Brand as

COHESIVE PLATFORM

“We see the world differently and our products unlock previously inaccessible value, both tangible and intangible.”

SELF-EVALUATION

How do you know if it’s time to evolve your brand from Product to Platform thinking?

- Your product set is proliferating, bringing in new audiences and expanding market potential.
 - Competitive pressures in your existing market are heating up and you need to differentiate in new, meaningful ways.
 - Your priorities, messaging, and resources are splintering across multiple products and services.
 - Investors are asking where the next tranche of growth will come from and you are on the hunt for ways to increase revenue and LTV.
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Voice of Experience

As the CEO, you have the most robust and comprehensive view of the company. While you see growth opportunities in shifting from product to platform, without the same purview, your team might be sensing changes that they don't fully understand, stirring angst and uncertainty. This dynamic can rapidly torpedo progress if not managed proactively. It's important to be aware of the unspoken human dynamics while moving with conviction.

How to build a platform brand

> 1. Think like a platform brand

The shift from Product to Platform requires a fundamental reframing of what you're selling, who you're selling to, and, often, who and what your competitors are. This demands that the org—across teams and functionalities—elevate its thinking and begins to see itself in a new light—as a platform.

STEP 1

Engage in deep inquiry with yourself, your leadership team, and your broader cross-functional team.

Begin with yourself. Run through the following questions and give your honest answers. Jot down where you feel there is room for improvement or where you don't have enough information. Bring these questions to your exec team. Ask them for their honest assessments in a judgement-free zone.

MENTAL MODEL

Exploratory: inputs, not answers

TIME INVESTMENT

60 minutes of deep work on your own,
90-120 minutes with the exec team with
expected follow-on tasks.

KEY QUESTIONS

- Where are we finding traction? Where are we meaningfully differentiated? Think about: product, process, team, macro conditions, etc.
- Where are we missing out on opportunities? Where are we wasting time?
- If there's a gap between our internal perception of our value and external articulations, how might we bridge that gap?
- We know what we do but do we know why it matters? What should our team, our customers, and our investors understand about why what we do matters?
- What connects our range of products and services, both current and future? Think: technology, category, benefit, end user, etc.
- Are we living up to our current mission? How might we revise our mission to reflect the ambitions of our business today? What are we willing to let go of to grow? What is worth fighting to keep?

STEP 2

Host conversations with your customers—current, potential, and lost.

Every CEO is fluent in data. While that fluency is (of course) helpful here, it is not sufficient. In order to unlock the most transformative brand insights, you(r team) must speak with the people you are selling to, in real time. This is particularly critical at moments of transition.

MENTAL MODEL

Neutral curiosity. You must be willing to take in new information in this process—stay open-minded. If you're only looking to confirm your internal assumptions, it's better to move with confidence and skip this step.

TIME INVESTMENT

Give the team 4-6 weeks for exploratory conversations. It takes time to get on customer calendars and your inputs here determine the quality of your outputs. Reserve 30-60 minutes per conversation.

NOTES ON EXECUTION

The lead interviewer should be a neutral party (i.e. not the customer's sales rep) and must be responsible for bringing insights back to the team.

KEY QUESTIONS

- What problem are we solving for you? How has that evolved over time?
- What other options did you consider and evaluate before choosing us? What was on the line for you as you made the choice?
- What stopped you from implementing this solution sooner? What stops you from doing more with our product/service? Probe for new/more recently launched products and services.
- Where are we excelling in delivering our product/service? Probe outside of core product features—think customer service, flexibility, value...
- What would you be doing if we/our category did not exist? How would you solve the problem?
- What are we missing? About what you want, about what you need, about what makes an impact in your business?
- If you could create your own solution, what would that look like? (Assume you have no financial, technical, or organizational constraints.) Probe for details.
- What else should we be thinking about?

STEP 3

Interrogate and work through tensions.

Building from steps one and two, take what you've learned and start to surface and work through key tensions with your exec team. Use the questions to the right as a starting point.

For each of these four questions, try to get to either resolution or acceptance. If the tension isn't hamstringing the business, it's okay to leave it be for now—but keep an eye on it. If any of these tensions are inhibiting growth, progress, and velocity, it's time to make a decision.

MENTAL MODEL

Productive conflict, clear decision making.

TIME INVESTMENT

Tactically, you must give your exec team the mental time and space to work through these tensions. Typically this step requires 2-3 focused meetings with clear objectives and outputs with the goal of articulating answers to these fundamental questions.

NOTES ON EXECUTION

Exploring tensions is not always natural for leadership teams, so it requires both focus and space to uncover them. To do that, it is helpful to deputize someone from outside of the org to A) identify and B) moderate the discussion around these tensions.

KEY QUESTIONS FOR INTERROGATING TENSIONS

- Internal vs. internal perceptions: where are we stuck?
- Internal vs. customer wants/needs/priorities: where are we missing opportunities to drive value for our customers? Where are we doing well and could be doing even better?
- Internal vs. competitors' trajectory: Where are we meaningfully differentiated? Philosophically? Pragmatically?
- Internal vs. future? Where is our current behavior misaligned with our future ambitions or the trajectory of the category/culture/tech?

STEP 4**Identify and try big ideas on for size.**

Thinking through what you uncovered in Steps 1-3, begin to capture the big ideas that surfaced. It's important to note that big ideas are rarely explicitly said by customers. Identifying them requires a close examination of the higher-order benefit customers gained from our product and the emotional resonance of those benefits. Use the questions to the right to kickstart the idea generation process.

MENTAL MODEL

Generate and investigate

TIME INVESTMENT

Half-day work session
with cross-functional
leadership team

NOTES ON EXECUTION

An outside moderator/
facilitator is often helpful
here to structure and
push thinking

KEY QUESTIONS FOR IDENTIFYING BIG IDEAS

- What is the emotional or philosophical benefit we're delivering that cannot be summed up by (only) product specs?
- What can we extrapolate as the higher-order benefit customers unlocked by using our product? How might we be able to lay claim to it?
- Where is there an unmet need that we could confidently fill?
- Where does our worldview diverge from the competitive set in a meaningful way?

Once you've identified the most compelling big ideas for the brand, it's time to decide which one should become your brand's platform idea. This selection doesn't mean abandoning the other elements—it simply means turning up the volume on a singular aspect and allowing the others to play a supporting role.

In order to "try on" a big idea, ask yourself and your team a series of probing questions, such as the ones to the right.

KEY QUESTIONS FOR EVALUATING BIG IDEAS

- Does this idea help make sense of our rapidly-expanding product set?
- Does it build from the strengths of our existing product(s) while making space for our future?
- Does this idea give us permission to play bigger, charge more, and fight more effectively?
- What would this idea mean for our culture, our business, and our long-term ambitions if we leaned all the way into one aspect of our brand over another?

Setting Expectations

TIME INVESTMENT
10-14 weeks

OUTPUTS
Revised mission statement
Redefined brand positioning
(the platform idea)
Brand value propositions

> 2. Behave like a platform brand

Now that you've identified your big idea, it's time to begin shifting market expectations. Every interaction and every touchpoint matters. When your brand is clearly reflected in what you're building (product), who and how you hire (culture), how you treat one another and your customers (values), and what you say and how you say it (marketing and comms), you become increasingly easy to buy and more difficult to beat.

At the earlier stages of growth, brand is often owned exclusively by marketing yet, as your org matures at the platform stage, it's essential that the work of activating your brand be disseminated and owned cross-functionally.

CULTURE

Activating brand through company culture

Culture is the gatekeeper to change and your values are the foundational expression of your company's culture. Your values also act as a powerful differentiator at the platform stage, helping to attract the right hires and the right customers:

ACTION

Refine your values after evaluating what no longer fits at this stage of growth, what should remain, and what you need to add to guide your team's trajectory.

LEAD

HR with collaboration from key functional leaders (this is critical!)

PRAGMATICS

- A short internal survey to understand employee sentiment on current values can be helpful here as you seek to build momentum internally and ensure execs are aligned with the broader team.
 - Update values and share widely
 - Update job descriptions to reflect your platform's values
 - Update KPIs to ensure your teams are incentivized to deliver on platform brand priorities
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PRODUCT

Activating brand through product

A strong platform brand will unite your disparate range of offerings into a single, compelling narrative that speaks to where you are today and where you're headed tomorrow. That is only possible if your product and brand teams work in deep collaboration. Misalignment between brand promise and product reality is a surefire way to degrade customer trust and make you an easy target for competitors.

ACTION

Programmatize deep collaboration between product and brand so that product roadmap reinforces your platform brand, and vice-versa.

LEAD

Product leads, brand informs

PRAGMATICS

Identify the appropriate cadence for meaningful collaboration between teams to identify near-term priorities. Monthly or quarterly product x brand syncs are a good place to start.

Voice of Experience

Many CEOs believe that Product comes first, always. We don't disagree with that. If the product isn't great, there is no business. Yet, the danger of that thinking comes when "product comes first" becomes "nothing else matters." Building a culture of

collaboration between product and brand early on helps to build more defensible products and more resilient companies.

GTM

Activating brand through go-to-market (GTM)

The function of GTM is to shift market perceptions and telegraph to the outside world that you're playing by new rules. Don't be afraid to try out your new platform brand across channels as you learn what's resonating and what needs further refinement.

ACTION

Kickstart a cross-functional GTM workstream with the goal of executing as a cohesive platform brand

LEAD

Coordinated effort between marketing, comms, and sales

PRAGMATICS

Target audience

- Re-define your ideal customer profile (ICP) to capitalize on your new platform positioning and expand relevant use cases.

Pricing

- Conduct a pricing audit to identify how your new positioning allows you to command a higher price point and/or different pricing structure.

Messaging and content

- Update website with new value propositions
- Revise your boilerplate and comms narrative
- Test messaging via paid campaigns and other executions
- Revise content strategy
- Revise your product positioning(s) and value proposition(s)

Sales

- Update your competitive playbook to ensure the sales team is clear on the new competitive set and key differentiators.
- Re-craft the sales narrative with the new brand platform value at the core

Design/Brand Expression

- Activate tone of voice, brand personality, and design to begin to differentiate beyond rational product features
- Evaluate your brand identity system—does it represent this stage of growth? If not, a design update can be a powerful symbol of major change, both internally and externally and will help to amplify your new messaging.

Voice of Experience

How to move through the design process requires its own jumpGuide. Watch out for aspects of the brand that “worked” early on that are being given outsized importance. Often, these early points of brand traction transform into edicts that limit the brand’s necessary progression. Strong creative and design work requires singular vision, not a chorus of approvers.

Setting Expectations

TIME INVESTMENT

Shifting organizational behavior takes a bit of time. Expect to see meaningful progress by 3 months and for your new platform brand to launch within 6 months. Ongoing work through the one-year mark is often required to complete the shift.

OUTPUTS

Values, updated ICP/personas, new pricing strategy, refreshed website, new boilerplate, product positioning(s), and value proposition(s)

> 3. Systematize your platform brand

Fundamentally, the product to platform shift demands that you move from ‘good enough’ hacks to sturdy systems that can sustain the pressures of a growing and increasingly complex business.

Systematizing success means thoughtfully hard-coding the platform brand into the way the business functions. Largely, this is about maturing tools and teams to drive efficacy and efficiency over time.

TARGET CAPABILITY	HOW TO	RESULTS	KEY QUESTION TO ASK YOUR TEAM
Actionable customer understanding throughout the organization	<ul style="list-style-type: none"> Consumer research to understand behavior Refine ICP personas and user journeys Test and learn with win-back campaigns 	<ul style="list-style-type: none"> A customer-led/ informed company Clear product roadmap and feature prioritization Rapid iteration of sales pitch KPIs: <ul style="list-style-type: none"> Increased customer engagement/satisfaction metrics Increased win rate Decreased CAC 	How are we staying close to our customers to systematically feed insights into our product, brand, and sales team workflows?
Motivating incentives aligned to platform ambitions	<ul style="list-style-type: none"> Revise incentive structures to support platform sales Arm teams with talking points to cross-sell products 	<ul style="list-style-type: none"> Moving up the value chain to higher-margin businesses/activities Vertical sales integration Competitive differentiation KPIs: <ul style="list-style-type: none"> X% platform sales Increase LTV by X% 	How does our training and incentive structure need to change to ensure our sales team is selling platform value, not just individual products?

<p>Category trust and legitimacy</p>	<p>Earn marks of trustworthiness such as Gartner Magic Quadrant and employee or enterprise certifications</p> <p>Showcase “trusted by” partner logos on website and in sales materials</p> <p>Gather testimonials and case studies that highlight the promise of your platform brand</p>	<p>Third-party awards, accreditations, and other industry-specific measures of maturity and trust</p> <p>Inclusion in industry rankings and content</p> <p>KPIs: Increase in NPS trust score Increase referral traffic</p>	<p>What are the most critical signals of legitimacy within our category?</p> <p>How might we leverage trusted advisory sources to demonstrate that our platform has matured?</p>
<p>Deep + productive relationships with your customer base</p>	<p>Build relationships with key category/industry influencers</p> <p>Host events with relevant IRL and online communities</p>	<p>A community of evangelists with powerful WOM</p> <p>KPIs: Increase awareness by X%</p>	<p>Where are our customers gathering today and how do we authentically reach them?</p>
<p>Generate goodwill with right-fit investors</p>	<p>Engage investors in the process of moving from product to platform</p> <p>Quantify value add/lift from brand-led initiatives</p>	<p>Momentum towards future fundraising efforts</p> <p>Attract ideal investor interest</p>	<p>How can we demonstrate that our transition from product to platform clarifies and amplifies the value we deliver?</p>
<p>Begin to shape the category</p>	<p>Leadership speaking engagements</p> <p>White papers</p> <p>PR</p>	<p>Leading the category conversation</p> <p>KPIs: 1-3 high-impact speaking engagements 1-3 high-impact PR profiles</p>	<p>What are the most potent outlets to generate momentum? How might we deploy our CEO to articulate our vision of the future to shape the category to our advantage?</p>

Looking ahead

Investing in a cohesive platform brand serves to elevate your thinking and make space for your existing and future products, fundamentally altering your growth trajectory. Yet, we know that your brand's ability to act as a partner in company building does not end here.

As you plan for your next growth phase, it's critical to continue leveraging your brand to foster goodwill before you need it—and that time will be here before you know it.

About the authors: Gabby Muse, founder of brand firm Studio Mococo, and Angela McLeod, principal at the firm, bring deep expertise in brand positioning and execution for high-growth companies. Recognized leaders in brand development, they will lead a workshop this October at IVP's European CEO Summit on the critical shift from product to platform.