Climb Meru: An Integrated Brand Experience

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Abstract

Small innovative design firm tackles the challenge of creating complex cross-channel brand experiences through the application of Experience Design methodology.

The key findings -

The development of an experience design methodology supports a rapid and cost effective brand marketing campaign focused on defining and delivering user experiences.

An integrated marketing campaign leveraging multiple marketing channels, proves extremely effective at reaching key, difficult to reach customer segments.

A Web site at the core of an integrated marketing campaign fosters participatory relationships with core customer constituents while prolonging existing relationships.

Testing user assumptions early and often is necessary to identify and negate detrimental usability variables.

The release of various media through complementary delivery channels at specific intervals of a project lifecycle, creates a holistic brand experience for target users.

Keywords

Brand development, Business strategy, Marketing communications, Experience design, Integrated brand experience, Information architecture, Interactive design, Visual design, Digital storytelling

"Just had a chance to spend some time on the Meru site. great work! Very fun and entertaining stuff. hats off to all of you. I spent close to an hour on the site. that is a good sign because I have a very short attention span for the web."

cheers,
Corey
User feedback on the Web site discussion boards proved valuable in shaping the design of later deliverables.

Episode 6, "The Act" tells the tale you've all been waiting for. Did the climbers succeed or didn't they? Find the answer illustrated with seven video clips, fresh photographs, and panoramic virtual imagery. The video is some of the most dramatic alpine climbing footage ever captured.

http://www.climbmeru.com - Check it out!

Best Regards,
Pete Takeda, Leader
2001 Meru Sharksfin Expedition

Industry/category

Climb Meru- The Sharksfin Experience is a multimedia documentary developed for three Client sponsors in the outdoor consumer products, apparel, fabric development, and publishing industries.

The project has many mutually supportive facets representing various aspects of the story. The Web site continues to serve as the central component of the project. From this core component, media is distributed broadly across a variety of platforms and channels – print advertisements, digital film documentary, television commercial, retail stores, tradeshows, and throughout the Internet.

The project continues to serve as a supporting informational piece, authenticating the spirit and essence of the Client brand. The project is simultaneously a sales tool, a documentary, an advertisement, and an identity piece.

Project statement

Climb Meru - The Sharksfin Experience is an episodic journal of a Himalayan expedition. Climbmeru.com portrays the efforts of two climbers on their third bid to be the first to climb the Meru Sharksfin in the Indian Garhwal Himalayas. This authentic interactive journal not only documents the drama of Himalayan climbing, but also captures the trials and joys of planning and executing a major expedition to an unclimbed mountain.

Figure 1: Opening Page, climbmeru.com Web site is the central component of the project, an episodic journal.

The mountain is sacred to Hindu and Buddhist cultures as the source of the Ganges River and as an iconic symbol in the Hindu/Buddhist cosmology. The Meru Sharksfin is a towering granite spire rising to over 6,000 meters. It is one of the world's great high peaks. (**See Figure 2: Mount Meru**.) An expedition team sponsored by Marmot and documented by texture/media, went in search of success in their 3rd attempt to summit the Sharksfin. In addition to arduous climbing on Meru the team was tasked with capturing the experience with digital media.

Figure 2: Mount Meru: The central spire is the un-summitted Sharksfin on the Meru massif.

"Between the idea and the reality, the motion and the act, falls the shadow"

- T.S. Eliot

This T.S. Eliot quote, which greeted users upon entering the site, served as a metaphorical guide for our project.

Climb Meru- The Sharksfin Experience, was a pilot project developed to gauge the effectiveness of a multi-channel marketing campaign based on storytelling. By portraying the Marmot brand experience as an engaging story, and extending the media throughout Marmot's marketing channels, the project created a Climb Meru brand community for the Client. A Web site, CD-ROMs, interactive kiosks, stickers, print ads in national publications, several feature articles, a short film, tradeshow booth imagery and multimedia presentations were some of the many artifacts supporting these efforts. **(See Figure 3: Artifact Relationship Map, p.4)**.

texture/media helped the Client leverage their investment in expeditions and athletes, a common practice in this industry. texture/media made the Client's investment into a valuable story with content asset supporting the brand and company values.

We encountered two related challenges in the development and design process of this project. The first was creating an initial ongoing user definition and methodology to test and confirm user acceptance and make project improvements.

The second challenge was creating a design and development process applicable across several disciplines. These included marketing and brand strategy development, Web and multimedia design and development, video production, and event production.

In addition to the unique processes inherent in creating useful media, we faced the additional complexity of following several concurrent and unique delivery timelines. Our challenge was to take the accepted methodologies governing these disciplines and integrate them into a single, cohesive project framework. At the same time, we faced real-world constraints based on the Client's product development and sales cycle. Deprived of the luxury of defining a methodology in the abstract, but forged broad guidelines at the outset. These guidelines were refined and evolved as the project proceeded.

The Web site served as the nexus of the campaign. It became a community-gathering site for climbers, providing an in-depth and interactive experience of the expedition. All supporting artifacts were developed to drive traffic to the site. In addition, the site encouraged visitors to register and receive updates of the project as the story progressed. With the publishing of each episode an HTML email was sent to users registered in the database. **(See Figure 4: HTML Email)**

The documentary style site spanned seven episodes. Each episode, presented as a feature residing within the traditional site architecture, offering the user multiple experience elements to self-explore. Episodic features included 4-7 separately titled video segments, panoramic movies **(See Figure 15)**, photography, and a chronological textual narrative. **(See Figures 8-11, 13, 14, 18, 19: Episodes 1-7 opening pages of climbmeru.com)**.
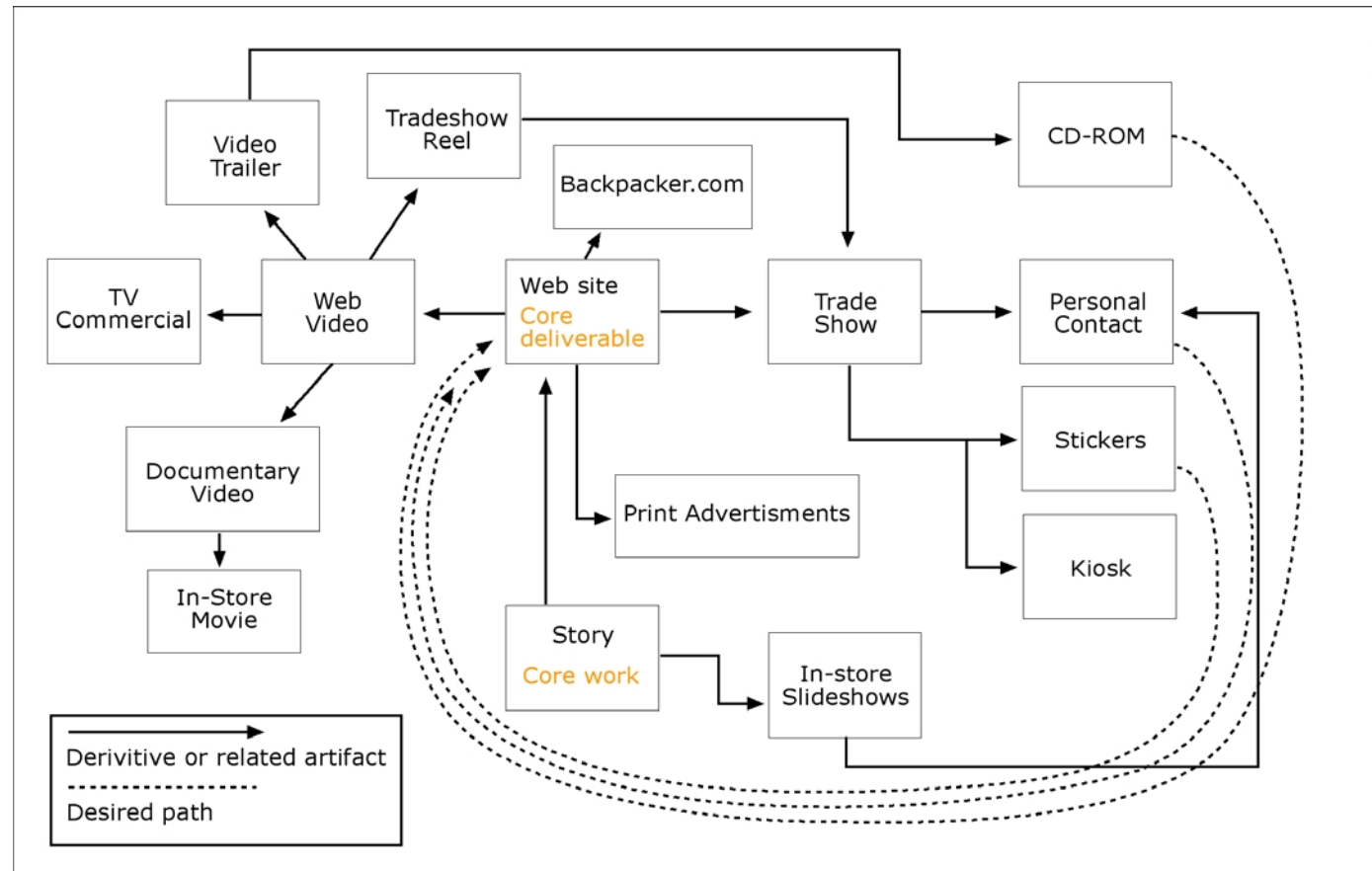
Figure 3: Artifact Relationship Map This diagram illustrates the various artifacts of the Climb Meru experience brand and their relationships to one another.
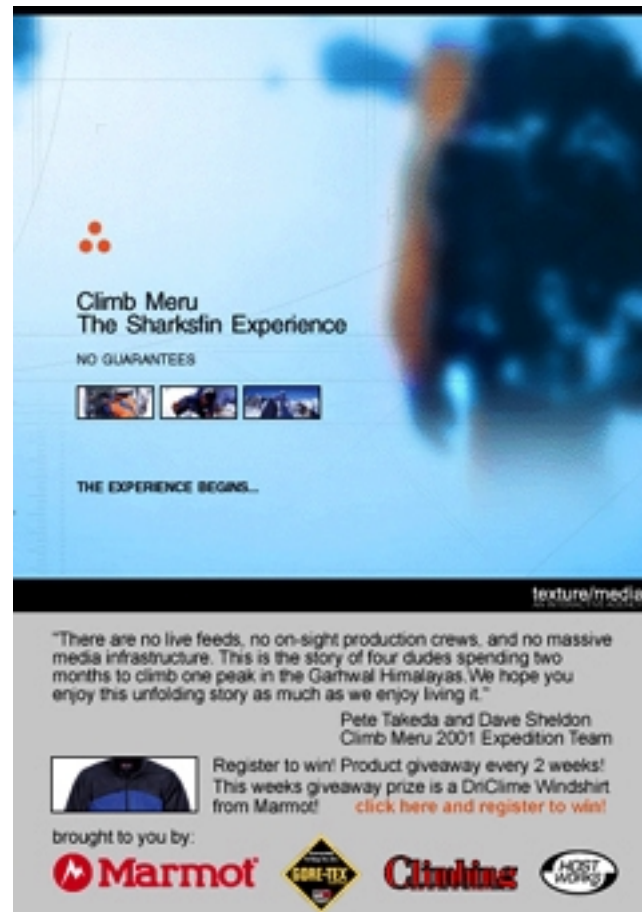
Figure 4: HTML email Example of HTML email sent to community members for each new episode.

Each episode was a story within a story. The titles for each episode were based on a thought provoking T.S.

Eliot quote, accompanied by sound selected to support the episode.

Supporting content elements included interactive maps, panoramic pictures, team bios **(See Figure 5, 7)** with video interviews, a glossary of climbing terms, and a Marmot gear section showcasing equipment and products used on the trip. **(See Figure 6)**
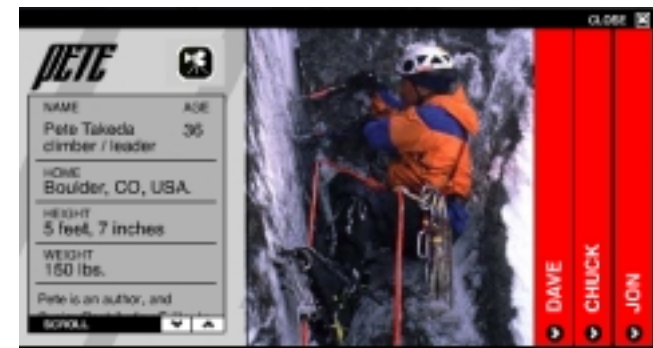

Figure 5: Team Bio Example of the video-based Team Bio Section.

The Meru chat board facilitated community participation. Users were encouraged to post messages and submit questions directly to members of the expedition.

As an additional promotional incentive to draw repeat visitation, the site conducted a free product drawing. Brand constituents received prize awards for community participation. Each episode release saw a random drawing from a pool of database registrants. Prizes with retail values of $150 - $350 were awarded. Seven episode prizes and a Grand Prize were awarded

in total. Winners resided across the globe including locations in the United States, Europe, and Asia.

Figure 6: Gear Section Example of a selected piece of Expedition Team gear.

Project participants

- Client Stakeholder – Tom Fritz - VP of Marketing Marmot. Determined brand positioning and key user messaging.

- Brand Strategist – Andrew Davison - Envisioned, designed, and developed project concept. Responsible for client communications and the development of future projects.

- Project Manager – Brendan Kiernan - Managed all aspects of the production process - discovery, design, development, and deployment.

- Art Director – Kameron Kerger - Developer of graphical standards across all mediums.

- Technical Developer – Jennifer Northway - Developer of chat boards, Web site, and CD-ROM programming.

- CD-ROM and Map Developer– Max Chadwick - Developed CD-ROM specifications and interactive maps.

- Graphic Designer – Brian Wilson - Created visual concepts and design.

- Graphic Designer – Matt Ludwig - Created visual concepts and design, still imagery and QTVR production.

- Video Producer – Frank Pickell - Directed video production, editing and Web compression.

- Managing Editor – Pete Takeda - Developed content, participated in user research, and field production.

- Expedition Team – Pete Takeda, Dave Sheldon, Jon Degenhardt, Chuck Bird

- Brand Constituents – The athletes, retail sales professionals, and many users of Marmot products and core audience members who lent their time and insights to help guide the process.

NOTE: Information architecture and interactive design were created through a series of team meetings including all project participants. Subsequent refinement of architecture and design was based on user feedback throughout the project.

Figure 7: QTVR Menu Index of Panoramic images presented in QTVR format.

Project dates and duration

The project was initiated on March 28th 2001. The site was launched May 20th 2001. The final Grand Prize drawing was posted October 5th, 2001. Climbmeru.com, with no promotional support, continues to attract visitors 5 months after the posting of the last episode, with over 3,000 unique visitors in January of 2002 alone.

The story continues to expand beyond the initial scope of the project. It will soon be distributed as a television commercial on the nationally syndicated show "Anyplace Wild". From May 2002- June 2003, Climb Meru will reside as a core content element on Backpacker.com, a digital property of Rodale Press.

Design and development process

We faced two key design and development process challenges through the course of this project. The first challenge was developing an appropriate user-focused discovery process necessary to successfully design the overall project scope, timelines, and components. Once we had created this methodology and completed our

Figure 8: Home Page Opening page, climbmeru.com.

Figure 9: The Idea Opening page, Episode 1.

initial discovery, we faced a secondary challenge. How would we bring together diverse strategic and creative development efforts under the rubric of a single design and development process? The answer lay in authenticity.

Project roots can be traced to texture/media's guiding belief in engaging storytelling as a critical component in creating a brand experience and building a brand community. Early discussions with Pete Takeda, a Marmot sponsored athlete, created the opportunity for texture/media to document the Meru attempt. However, neither the primary Client nor texture/media desired involvement in an over-hyped Web-based extreme sports spectacle. The question: How to document the Meru climb experience through multimedia to create a unique, mediated and episodic experience of the Marmot brand?

Answering this question required a user-focused discovery and project design methodology implemented through both the initial discovery and developmental phases. Such a tactic allowed us to gather ongoing user feedback to evolve and improve the project as it progressed.

We designed our approach based on a traditional storytelling model of communication. We conducted a series of experience workshops starting with the climbing team and working outward to include Marmot athletes, local retail employees, and climbing enthusiasts. The goal during our informal sessions was not to gather a comprehensive snapshot of the Client's entire brand constituency. Such a project was neither possible nor desirable given the Client's budget and goals. We chose to follow the thread of an unfolding story and determine who the audience was and how it could best be told.

Our first workshops involved documenting the climbing team during a typical day. We used video to record their personal and professional interactions and activities. By reviewing this footage in the experience workshops, we were able to locate the meaning of the expedition in the larger context of the brand community. We also leveraged some of this early footage in the first, pre-trip episodes of the Web site.

By combining primary data with secondary market research data, we determined that the overall brand constituency was quite varied. Most significantly, we discovered that the key user group, though relatively small, exerted vast influence over the balance of constituents. The members of this group - retail shop owners, managers, and employees - are the brand authenticators and disseminators. These individuals showed the greatest interest in the plans of our climbing team. Based on their position as the conduit for the consumer experience of the brand, these authenticators and disseminators proved the greatest "carriers" of the story to the larger audience.

Our goal was to reach this audience by providing a compelling story effectively "influencing the influencers". The story created value as a marketing tool and provided a cost-effective method of customer acquisition and retention.

After determining our focus user, we defined the *brand experience*. We divided the elements of experience into two primary categories: Sensory (Tactile, Visual, and Auditory) Intellectual (Emotional drivers, functional drivers, and cultural drivers). (**See table: Experience Matrix**).


Figure 10: The Reality Opening page, Episode 2.

Figure 11: The Motion Opening page, Episode 3.

Table: Experience Matrix

Sensory	
Tactile	Responsive, flowing
Visual	Pleasing, current colors, lush photographs
Auditory	Mystical, enticing, hip
Intellectual	
Emotional	Adventurous, intimate, authentic
Functional	Resources, geographic information, product information
(Cultural) Self-actualizing	"Core", non-pretentious, aspirational, personal image

We tested our assumptions with a sampling of key users garnered from some of Marmot's key retail outlets. Again, we kept these sessions as informal and story-based as possible. We kept our questions focused on their interest in the project. We taped the session as a means of recording and later analyzing participants responses. This process led us to our final Experience Matrix and facilitated objective decision-making regarding project direction.

Next, we explored the constituent/brand relationship using a visual tool we called the brand relationship diagram. The diagram helped us determine how key brand attributes, constituent expectations and perceptions interrelate within the overall brand experience. **(See Figure 12: Brand Relationship Diagram, p.9)**. This visual model provided the bridge between the discovery phase (user research) and the design phase (visual, information, and technical design). At this point, based on the Brand Relationship
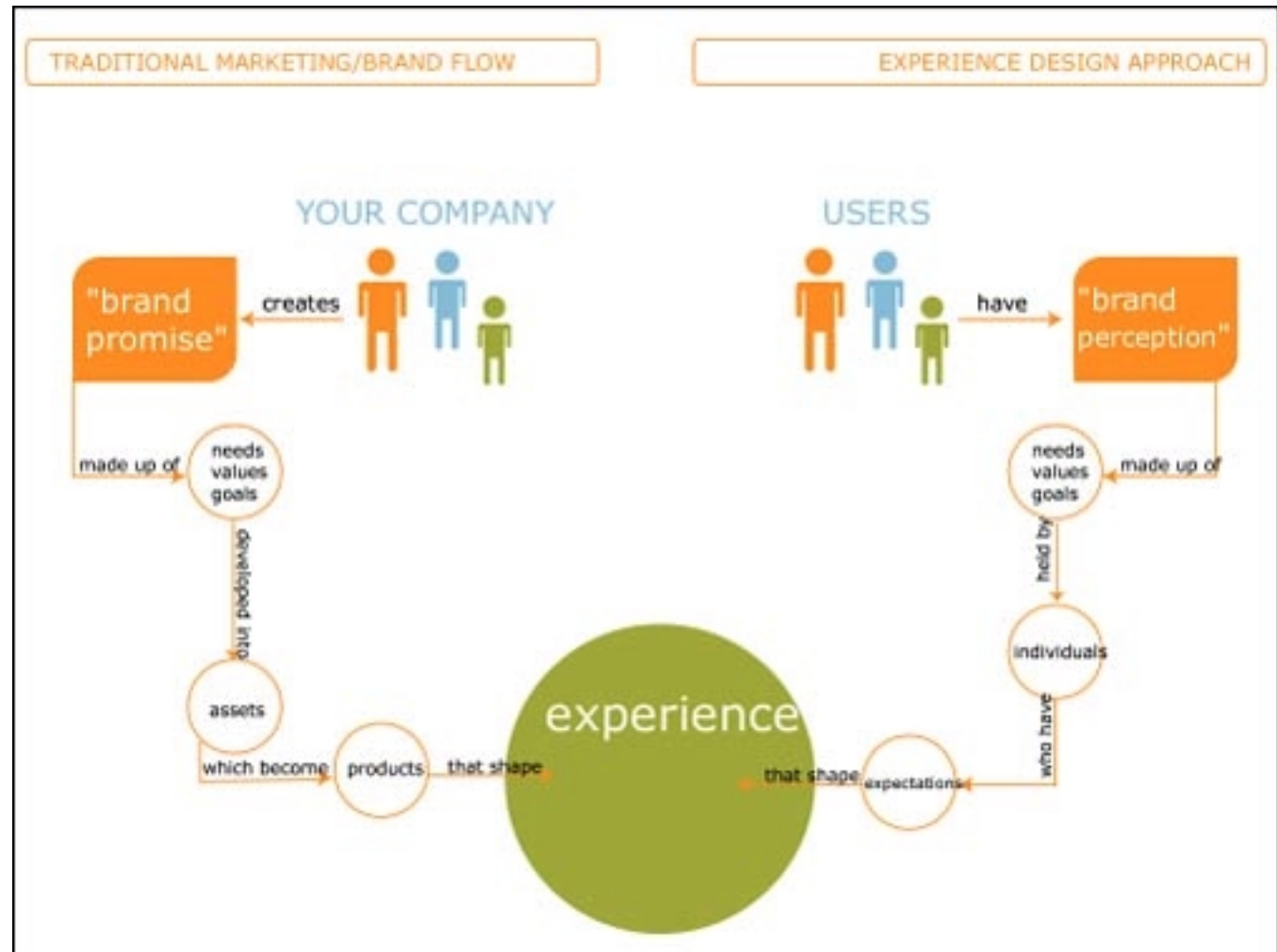
Figure 12: Brand Relationship Diagram This diagram displays the parallel yet opposite approach of both the brand promoter and that audience at which it is aimed.

Diagram, we developed the strategy and timetable for media release of throughout the project lifecycle **(See Figure 16: Project Lifecycle, p.11)**.

At this point, the parameters for user experience were set and the discovery phase concluded. The next step, the design phase, was initiated. Technical design, visual design, documentary-video process development, and information architecture ran concurrently. All design phases were continually judged against our experience guidelines. Much of this work was ongoing as initial feature segments were developed while the expedition team was in India.

Throughout the project lifecycle we continued our informal user experience research by effectively infiltrating the community - listening and asking questions. Some of the most valuable feedback we received came from overhearing coffeehouse conversations and going to local rock gyms and climbing events on a regular basis. Our location in one of the United State's best well known climbing communities - Boulder, Colorado - and the presence our on-staff climbers and outdoor enthusiasts aided in this process. Feedback received through these channels was brought back to the weekly team meetings and discussed. Several times during the project, feedback from seemingly disparate sources came together to create a catalyst for a major architectural or content revision.

At the conclusion of the initial discovery phase, we faced our secondary challenge — managing the project as a cohesive campaign. We were faced with up to six different design efforts in different media occurring simultaneously on varying timelines.

For example, while involved in user and functional testing of the Web site interface, we simultaneously designed the first episodic features including interactive maps. At the same time we deployed the initial aspects of the traditional advertising campaign and also planned the tradeshow efforts**. (See Figures 15 and 17)**

In order to ensure the integrity of each component while maintaining an overall cohesion of visual and information design, we created a brand strategy task group to oversee the project. This task force included the Brand Strategist, Project Manager, and project Art Director. Each individual project component such as the Web site, the video segments, the CD-ROM, etc., was staffed with its own project team (due to resource constraints there were several overlapping teams).

Figure 13: The Place Opening page, Episode 4.

Figure 14: The Test Opening page, Episode 5.

Figure 15: Interactive Map Map 3 of 4 within the Interactive Map Section of climbmeru.com.
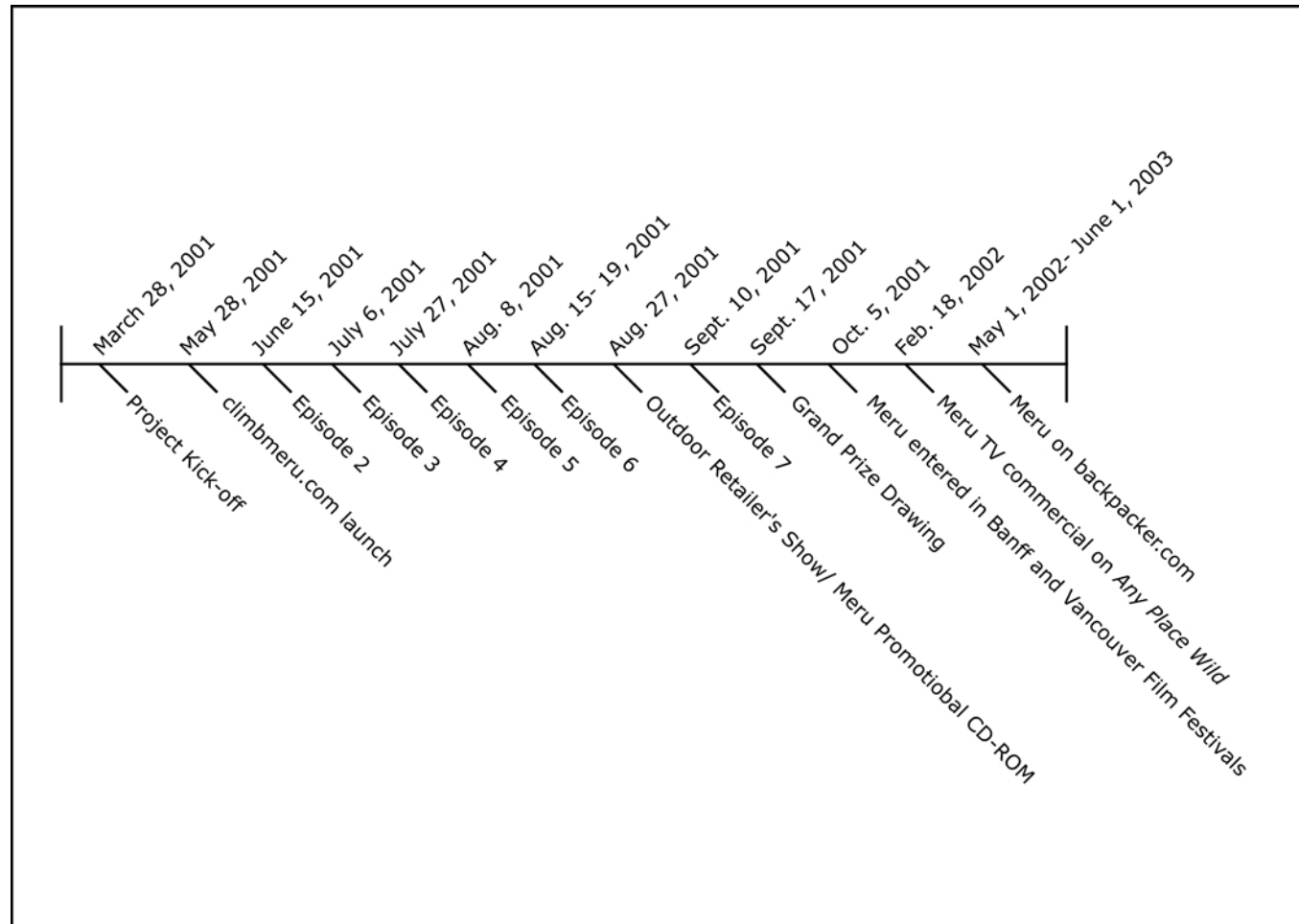
Figure 16: Project Lifecycle The Climb Meru lifecycle involved the launch of several Media experiences targeted to meeting key user demographic and psychographic traits.

Figure 18: The Act Opening page, Episode 6.

Figure 19: The Shadow Opening page, Episode 7.

Figure 17: Interactive Map Map 4 of 4 within the Interactive Map section of climbmeru.com.

Each project team was provided with scoping, scheduling, and intermediate deliverable documentation as appropriate. For example, the CD-ROM process included wireframing and functional prototyping while the video segments included music and sound design reviews. The brand strategy task group held weekly meetings to review individual project deliverables.

Review criteria included satisfying individual deliverable requirements as well as meeting overall project objectives. The parallel development of phases within the overall project created certain distinct advantages. The benefits included continual refinement and improvement, combined with evolving design and functional elements based on ongoing user feedback.

For example, based on statistical and qualitative analysis of early Web site use, we were able to

determine that movie length proved less than optimal for key users. Therefore, we shortened the length of the movies for subsequent episodes, achieving an appreciable rise in overall visitors to the site.

Direct user feedback through the Web site also influenced the design of subsequent media released in the later stages of the project lifecycle. Based on popular discussion forums, user response to an information kiosk, and direct interviews at a key industry tradeshow, we decided to produce a documentary style film for submission to film festivals and retail store distribution. This film has since evolved into the production of a national broadcast television commercial.

Solution details

By its conclusion, the Meru project included a host of elements. These included the following:

- A Web site with over 270 minutes of edited video footage spread across seven episodes.
- 2,500 CD-ROM's containing a cliffhanging four-minute trailer.
- A documentary-style 14-minute film submitted to the Banff and Vancouver Film Festivals and distributed to over 100 of the Client's key retail partners.
- A television commercial on a nationally syndicated program. The commercial will be run for 30 episodes through June 2003.
- A content element on the Web site of a large nationally distributed magazine.
- Several print advertisements in major consumer industry magazines.

- A tradeshow booth display that included a Web-driven kiosk, looped promotional trailer displayed on a flat panel television.
- A feature article in an international magazine.
- A traveling slideshow and video presentation.
- A departmental write-up in Sports Illustrated magazine.

What was the cumulative effect of this integrated approach? The primary Client, Marmot, continues to receive overwhelmingly positive response from their retail store partners, managers and employees, sales representatives, international distributors, and from the national media.

The project was the centerpiece of Marmot's booth at the major industry tradeshow of the year, the Summer Outdoor Retailer Show in August of 2001.

"It gave me some insight of what an expedition is like, and the reality and frustration in planning a trip in the third world."

-dan-downunder, Meru Chat Board User

The "tell it like it was" mentality resonated with key users worldwide.

Figure 20: Promotional CD-ROM CD case artwork and face of promotional CD-ROM.

The documentary film was submitted to several film festivals. The site is being considered for a number of interactive design awards. The Web site to date has received over 55,000 unique visitors, a number that continues to grow each month. With the development of the television commercials and the licensing of the content to Backpacker.com the lifespan of the Climb Meru story extends through June 2003, more than two years after the posting of the original episode.

Climb Meru– The Sharksfin Experience is a mediated reflection of the values and dreams of the target user. Though very few climbers have the skills, courage, or tenacity to attempt a climb like the Sharksfin, almost all climbers dream of it. The primary Clients for the project, especially Marmot, have built, and continue to grow their businesses on this premise. Our target user was an insider in the tight knit climbing community. He or she was someone who knew the difference between Hollywood and the Himalayas and would sniff out sensationalism and hyperbole.

As much as possible, we "told it like it was"- from our branding tagline of "No Guarantees," through all the media we produced. We gave as much weight to the strains of team dynamics and the altitude sickness as we gave to the views. Our climbers showed fear and, in the end, they failed to achieve the summit. In short, they were accessible, real, and human.

Over and over again, in our user research, Web site and email communications and personal interviews, we were surprised by the passion our target user held for what they considered the "reality" of outdoor adventure.

By breaking the hero mold, we successfully mediated the experience of the Sharksfin to resonate with the brand authenticators and disseminators. At the same time, we leveraged storytelling, (endemic to the climbing experience), creating a highly functional and aesthetic artifact reflecting Marmot product and brand attributes.

Significant challenges occurred throughout the process. Two of the most intense were the technical limitations of Web-based video and striking a balance between creating a user interface transcending traditional interface design without hampering navigation.

The inclusion of rich-media, namely video, as a primary vehicle for communication of the story carried the inevitable bandwidth and plug-in concerns currently plaguing this type of media on the Web. **(See Figure 21)**

Figure 21: Video Interface Example of a Video Interface used in each episode.

To mitigate these issues, we created a settings application using the most ubiquitous platform (Real Player/low bandwidth) as a default. By doing so, we guided new users, making their experience as seamless as possible. More experienced users had the ability to change and save their settings to provide them with the best possible user experience. **(See Figure 22)**

The user interface question became an issue of hot debate among the project team. Some team members suggested a "guided" approach more akin to television or movie viewing than a Web site. Other team members accurately pointed out that at its core, Climb Meru was still a Web site and as such should be judged by traditional Web navigation and usability values.

Initial designs tended towards the "guided" approach. Ongoing user testing led the site to evolve significantly towards a more traditional user-driven Web site architecture. By continually testing usability, we were refined our approach to these two challenges. Even at its completion new approaches were discussed to create additional improvement.

For example, our discussions included re-designing the scrolling text letter that plays on launch to become a lightweight Flash-based presentation. We hoped to provide the same information in a more interesting, less demanding format. The team also considered the inclusion of a scrolling timeline to better illustrate the time continuum and aid in site navigation.
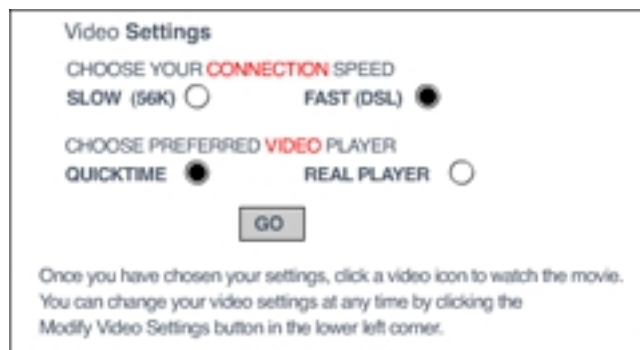
Figure 22: Video Settings Interface This shows the screen allowing a viewer to customize their video performance.

Figure 23: No Guarantees Hangtag

Post-launch result

The content and artifacts continue to live on and be refined and distributed through new channels to reach even broader audience segments. The Client has also initiated a new undertaking for 2002. The Client's decision to initiate a new project rested on the proven success of the Meru Sharksfin experience in reaching the core target audience and retaining a longer-than-expected brand experience lifecycle.

The new project branding builds off of the success of the "No Guarantees" theme and representing the next level of integration of media elements into the Client's marketing and sales channels. Adding to the successful distribution efforts of the Climb Meru project, the next "No Guarantees" story will be a first ascent and ski descent of a remote mountain in Southwestern China.

The project media will be fully integrated into all of the Client's retail channels. Rack-top displays, promotional product hangtags, and counter-top point of sales displays will be distributed to over 200 top retail accounts. Three hundred thousand promotional

hangtags will support the 2002/2003 Fall/Winter product line. **(See Figure 23)** Each hangtag offers the consumer a trial subscription to our partner Powder Magazine. Counter top displays will promote the grade prize giveaway offered by a partner resort. All of these efforts expand the reach of the campaign beyond the valuable retail employee segment to directly touch each store customer as well.

For texture/media, the project clearly demonstrated the value of developing integrated branding campaigns built off of an exciting and engaging story. Using realm of integrated digital media guided us in creating an enduring community and brand experience that continues to thrive and grow.

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