



How to Use Archetypes for Differentiation and Internal Alignment

This transcript was lightly edited for clarity.

Chris: Today I am very happy to have David Chapin on the program. David is the CEO of Forma Life Science Marketing. We will be talking about company archetypes and how they can be used as a tool for internal alignment, which is probably a great first step that will help with your marketing efforts but also a lot more than that. David, welcome to Life Science Marketing Radio.

David: Chris, thank you so much for having me on.

Chris: Yeah this is going to be a good one. First of all, please explain for the audience whoever is listening, what do you mean by an archetype and can you give some examples?

David: Great question. What do I mean by an archetype? Archetypes are common character types that we see in stories and myths in culture. Examples include the detective, the hero, the jester, the scientist. But there are thousands of archetypes including many that we'd never want to use in business. Such as the sloth, the mean girl, the evil dictator, the bully, we all recognize examples of archetypes.

Luke Skywalker is an example of a hero. Dana Scully from the X-Files or Olivia Benson from Law & Order are examples of the detective. Einstein and Neil deGrasse Tyson are of course examples of scientists.

When we come across a new character or a person, how do we know what archetype they are? We recognize the patterns of their attributes. For example, heroes are strong,

courageous, self-sacrificing. Heroes frequently undergo some sort of transformation and they can be arrogant. If you saw a character or even a company that exhibited these attributes you'd understand that they are exhibiting many of the characteristics of the hero and you would expect them also to have the other characteristics of the hero like stamina or a strong sense of faith because all of this goes together.

You expect the pattern to be complete and so you complete the pattern in your own mind. People are pattern matching animals. People are wired to recognize patterns of attributes and then to complete that pattern, even if it's based on incomplete information, that's what makes archetypes so powerful.

You see the audience completes the pattern for us and when audiences do this, they're actually doing some of our marketing work for us. They are completing the pattern, so that we don't have to. Archetypes got their start in the study of culture, but they were brought into marketing in the late '90s, early 2000s by some of the members of Young & Rubicam, famous ad agency.

Chris: Right. I love the whole concept which I hadn't really thought of but it makes total sense about completing the pattern. Of course, people do that and I've recently been thinking about talking more about audio content. I went to a conference last week and Alex Blumberg, who you may know from This American Life, talked about how with audio content you complete the pattern. If you hadn't seen a picture of him, you feel that you know him, in your head.

David: Absolutely.

Chris: That's a powerful thing because now it's something inside of you talking to you.

David: That's exactly right and you believe it more because it comes from inside. In fact, there's a wonderful term called apophenia, which means the condition in which you see meaning or see a pattern when there actually is no pattern there. For example, you look up into the sky and you see the shape of an elephant. We all know there's no elephant in the sky. The Virgin Mary isn't in the piece of toast or the grain of wood, but we have this pattern matching ability and in fact, you could argue that all life is pattern-seeking. Viruses are looking for the pattern to which they can attach and infect a cell. So all life is pattern matching, is pattern-seeking and we can harness this in marketing and in communicating and aligning our employees to help achieve our goals.

Chris: I love that. Let's start how can archetypes be used...first just generally, both internally and externally and then we'll dig in on one side of that. But go ahead and talk about how they can be used by a company.

David: Archetypes have many uses and many benefits. If we're going to use archetypes in marketing some of the external benefits include a clear articulation of what the company stands for. A consistent personality, clear expression and tone of voice, and then audiences recognize and resonate with our archetype if we've picked it well, which means that they see us as differentiated. And this will drive pricing power and profit. Now that's a really bold claim, isn't it? That archetypes can drive pricing power and profit. But the employees of Young & Rubicam in the late '90s and early 2000s actually looked at fifty very large organizations and they found that organizations that picked and stuck with a single archetype were actually more profitable than organizations that either didn't have an archetype or varied that archetype overtime. Now those are some of the external benefits but internally archetypes also have many uses and many benefits.

Again, you get clear articulation of what you stand for, you get a consistent personality, you get clear expression and tone of voice and you get better decision-making. Because we're empowering our employees to make decisions using the archetype as a touchstone or a pole star and this will bring alignment of the entire employee base. And that last one is measurable. We've actually done some interesting work measuring alignment of employee groups around archetypes.

So archetypes have many benefits, both internal and external.

Chris: I think, the usage for branding for this audience at least...I won't say they're doing it, but they can see how that can be beneficial and I'm hoping in the future we can do a whole separate episode of this podcast on that because I think that will be very helpful. Today I'm curious about how companies can use these archetypes as an internal tool and as you say as a touchstone because, you know, I've read some of your stuff and when you talk about companies and their mission statements and their values most people can't recite them let alone use them to guide decisions. So you mentioned it a little bit but what kinds of problems can you solve company-wide with an archetype and how do you know when it's working?

David: Great questions. There are lots of benefits, internal benefits to using archetypes and one of the biggest is that archetypes align employee behavior. For example, let's say we picked an archetype for our organization...I don't know, a detective. Then we would want to train our employees that this was our archetype, the detective. And specifically, we'd explain, that there was a very small focused set of attributes that come along with this archetype. Now I'll take a brief aside there. You think about the detective, there are lots and lots of attributes of the detective, right. All of them tend to be curious, some of them use more brute force, some of them are more sophisticated. And when you just start to actually write that down, the word cloud that you get is pretty big.

So we have to narrow that down for our employees and pick a finite number of those attributes. And we make it clear to our employees that we expect them to behave according to these attributes. And we could set up systems that allow and encourage employees to recognize the proper behavior in others and reward them for us, reward them for that proper behavior.

In this way, rather than try to the police behavior from above, we are deputizing our employees to help protect our organization. And then there's a famous example, look at VW. There was a small group of people internally that was gaming the software that was used for emissions inspection. And I bet that when the historians go and write the business case study for future business school students, we will find out that some employees knew what was happening and said nothing.

That's a textbook case of misalignment. We've got to deputize all our employees to help protect our organization and archetypes are a powerful way to do that. When they are used correctly, archetypes provide clarity of what we stand for common expectations for our employee's behavior, alignment of actions, goals and objectives and clear communication.

Chris: I said I wouldn't get into the branding side of it. But I have to...on that note, I have to bring it up because...and I'm sure you see this as well that, companies that have a brand police which is a very effort-intensive way of ensuring your...even visual branding let alone anything else. And I guess I just want to comment or you can comment about how this

might save a lot of effort if people understood this archetype of your brand and sort of police themselves and point out to each other, "Hey, that isn't the way we would say this."

David: Chris that's exactly right. The brand police came from the late '80s, the '90s, and it was an attempt to try to control the growing number of channels and avenues of expression. Because marketing 101 says, you want to be consistent. Look, we all...everyone is facing this barrage of noise in the environment. Marketing messages are coming at us from all sides. And so what do we do? We develop these noise cancelling filters in our heads to try to keep out the din and so to cut through those noise cancelling filters we've got to be clear and consistent and so consistency is part of marketing's fundamental toolkit and archetypes help drive consistency. Because we can either try to impose consistency from above, which means that no communication can happen unless it's been through the brand police.

Well today, that's impossible right? Everybody's got a Twitter feed, everybody's got a Facebook page, everybody can say basically whatever they want out loud on the internet and so we can't impose it from above. We've got to get our employees to help monitor other's behavior and help everyone head in the same direction and that's one of the values that archetypes can bring and I put all of that under the giant title of employee alignment. It's not only alignment in what we say but in how we say it.

Chris: I love that. In my experience the brand police situation happens more in larger companies and they are the very ones who are already slow by nature and they are adding one more thing to slow them down.

David: Exactly.

Chris: This is a place where they can get some of that advantage back by implementing an archetype. Can you point out some examples of companies that have an easily identifiable archetype even if it's not within the Life Sciences?

David: Yeah, there are lots of examples of easily identifiable archetypes. One of the big benefits of archetypes particularly from an external view is a differentiation they provide. So archetypes are most often seen and in fact, in marketing they were first seen in sectors where differentiation is really difficult, such as consumer goods. Look at Coke and Pepsi.

The difference really isn't inside the bottle. The difference is really outside the bottle. The same is true for toothpaste and laundry detergent for your clothes, the difference really isn't inside the tube or inside the bottle. It's outside the bottle. Archetypes show up there as a way to clarify what you stand for and how you express it and so if we look at some of those consumer products.

Chick-fil-A, it's a jester brand right? They are using clumsy inventive cows to invite you to join in the fun and Wendy's on the other hand, goes to market as an Everyman which is part of the citizen family of archetypes. Nike as a hero brand, their call to 'just do it' is a call as Shakespeare said, to screw your courage to the sticking point. It's a call to conquer your own limitations, to concur your competitors. It's a call to be a hero. REI they sell much the same equipment that Nike does. But they go to market as an explorer, their call is to go find paradise. In B2B Life Sciences the use of archetypes is very young and this actually means that companies to choose an archetype now will have a **wider choice of archetypes than companies that wait**. Because you don't want to choose an archetype that's exactly the same as your competitor but was in fact that would be non-differentiating.

Chris: And you don't want the leftovers either.

David: That's exactly right. So another example is that everyone will recognize this one is GE with their tagline 'Imagination at Work'. They're going to market as an innovator and they've done that for years. So there are lots of examples and once you start to tune into this, it's not hard to see.

Chris: I love those examples you've given in particularly where...for example, the REI versus Nike, where they do sell similar things but they pick different archetypes. And with GE who's already done this and been doing it for years. So when we talk about the advantage of doing this, if I'm a company, someone in a company listening, what does it take for a company to develop an archetype? How do you go about picking smartly what your archetype should be?

David: It is not a trivial process. Archetypes are similar to a marketing position -- that thing that you stand for. You don't want to change it every week, every month, every quarter, every year. In fact, you want to think about the lifespan of an archetype or of a position measured in decades. So five things that organizations must possess to effectively implement archetypes, first, organizations need courage. You need a clear sense of what you stand for and why you're different and better so in marketing speak you need a unique

position and if your position is going to be unique you have to have the courage to say 'no' to the pressure, to try and be all things to all people.

So to implement archetype successfully, you need courage and second, you need to have creativity. You need creativity to select and articulate your specific archetype. And this is really difficult for most organizations, in part because they don't have a lot of experience or practice doing this. It's hard for organizations to see their own situation clearly. To put it a little more colloquially, it's hard to read the label from inside the jar.

To make archetypes successful, you need creativity and then you need clarity. You think about the detective archetype, right? We already talked about the fact that there were dozens of examples. Sherlock Holmes is hyper-rational, Dirty Harry uses much more brute force and you have to define your archetype very, very clearly. Because what you stand for and how you articulate it has to be simple enough and memorable enough so that all employees can internalize it and behave consistent with that archetype. So to implement archetypes successfully, you need clarity. Fourth, you need commitment. Your choice of archetype has to be long-lasting. You got to pick one and stick to it. Having a different archetype every year is much worse than having no archetype.

And training your employees in what your type is and what you stand for is not a one-and-done affair. To make archetypes successful you need commitment and last, you need consistency. Getting through to audiences is really hard, whether we are talking about internal or external audiences. Look, they're focused on their own challenges. And there's just so much noise in the environment that it's really hard to cut through. So to cut through those noise cancelling filters we have to be consistent. To summarize, to choose an archetype successfully you need to have five things: courage, creativity, clarity, commitment, and consistency.

Chris: Nice. How do you recommend that a company gets started to really make this stick? I mean, you've said what it takes to develop it but what does it take to get started? How does someone first of all make the case and then what does it take inside the company to make sure that this is actually going to happen?

David: That's a great question. How should organizations get started with archetypes? You need to understand that every sector in the Life Sciences has common archetypes. These are almost the de facto choices. For example, instrument companies often use that tone of voice of the innovator as in "We're leading the pack" or the engineer, "Oh, we build great

instruments." And service companies in the Life Sciences like labs, they often use the tone of voice of the scientist, "We know how to run experiments." Or the caregiver, "We'll take good care of your data."

And these sector defining choices should be avoided because they're so non-differentiating. So if you're going to choose an archetype you have to understand what the common sector defining archetypes are so that you don't choose the wrong one. And organizations have to understand that all archetypes have negative parts of the pattern called 'the shadow.' The shadows are collection of negative attributes. Part of the shadow of the scientist is the tendency to focus so much on the details that you missed the larger meaning. That's just part of the scientist archetype. You can't ignore it, and so you have to make plans to deal with it. And so when you're implementing an archetype you have to take the shadow into account. So that you don't choose an archetype whose shadow can as it were come back and bite you.

Organizations shouldn't pick a standard archetype. I'll say that again because that's so important. Organizations shouldn't pick a standard archetype.

Chris: Meaning the scientists or the innovator because those are kind of the default go to.

David: That's one interpretation of that. That's correct. The other way to think about it is...well let me tell you how other creative services firms implement archetypes. They'll try to describe an organization by using combination of archetypes. "Oh! You're a primary caregiver with two smaller wings, a concierge, and a sage." And that's crazy, that's so muddled, that your internal audiences won't know how to behave and therefore they won't know how to talk about themselves. And what's that going to mean? That means that your external audiences are going to be totally confused.

So if you're going to pick an archetype, what we do with our organizations, is we pick a general archetype, like the caregiver or the concierge or the sage or the scientist. And then we customize the set of attributes that for that organization this archetype will represent. So it's not an un-customized archetype.

You shouldn't pick an archetype that is "Oh! We're just going to be the scientist or we are just going to be the detective." You have to localize and narrow the set of attributes. Because each archetype is really so complex a set of attributes that it's too complex for employees to internalize. For example, if all I said was, well we're going to be the detective,

then some people might think, "Oh! I'm Dirty Harry, so I get to go around and sort of brute force my way through problems." Whereas someone else might think, "Oh! I am Miss Marple or Hercule Poirot and I can finesse my way through issues and those are two very different kinds of behaviors. What we need to do is, we need to come together and have a single understanding and that has to come from the leadership team.

The leadership team has to drive the adoption of an archetype. This is not a choice that's layered on top like a coat of paint. When archetypes are implemented correctly, they affect the culture, they affect hiring, they affect employee behavior, they affect lots of things within an organization. They're powerful. We've got data that show that they can bring employee alignment but like all powerful tools they can do as much harm as good.

Chris: Is there any customer input into, you know, how you're already seen? So something that might help someone align themselves with their customers' existing impressions rather than...I am fascinated by the whole idea of it and I completely understand not picking the scientist or the innovator but then the set of choices is so wide and so many interesting, attractive things you just say "I want to be Columbo" or whatever it is. But, how do you start to narrow the idea and do customers ask some things and then get some ideas while they're sort of seeing us like this, how can we amplify that characteristic?

David: Yes. That's a really great question. So when we help organizations to pick archetypes, not only do we talk to customers and find out what attributes they ascribe to a particular organization but we also talked to employees. Now you have to be careful, because just because employees say, oh we see ourselves as the sage, that doesn't mean you should be the sage. That's a little like asking your kids what do you want for dinner and the 3-year-old says, "Well, I want ice cream." But you don't get ice cream until after dinner. Ice cream is dessert.

So we do find out what customers think and we do find out what employees think but that's a backward looking assessment and marketing is a forward looking activity. So you don't want to let the past drive or control excessively where you're going in the future. The classic example is mergers and acquisitions. Yesterday we were this company, now all of a sudden, we are bigger and we have the chance to be different. So looking backward is fine but you have to understand that what you're doing is you're driving down the road looking in the rear-view mirror. The chance for catastrophe is high. So really what you need to do is

you need to not look backwards, you need to not look at where you are, i.e. down at your feet.

You need to lift your eyes and look out at the horizon because that's where marketing can take you and marketing is not typically the kind of activity that brings immediate results i.e. measured in minutes. Marketing is trying to win the mind share of your audience and that doesn't happen overnight. So you need to take the long view. That's why content marketing is so important, right? Because that's the long view.

Chris: I love that long view, obviously, as a content marketer. I also like the idea of looking out to the horizon. Is the choice really that wide open? If I'm a company and I don't want to do the backward looking thing at what do my employees and customers say about me, I really have the whole...well, a large section of the menu available for me to pick along with some strategy about how we want to conduct ourselves in the future and...?

David: Yes, the choice is in essence wide open. And there are really two parts of that choice. And we are fond of labels, right? We're marketers and so we talk about the detective. But you could define the detective in a dozen different ways and what would make them different? Isn't at the top level, the level of the name. What makes them different is the collection of attributes that you assign to them and so the name is less important than the collection of attributes. Now it's very convenient to have a name because that enables employees to use shorthand with each other. "Hey! Joe. I saw you acting as the caregiver. That's our archetype. Good for you, I'm putting you in for a part of this employee recognition program and you're going to get a Starbucks gift card." Those kinds of programs can be really effective in helping employees police monitor and police each other's behavior.

And I bet VW wish they had spent a little money on that rather than the \$15 billion they are going to have to pay just in the U.S. to take care of this issue.

Chris: Ouch. Yeah, indeed.

David: So the name is important but what is more important is the shared understanding of what that collection of attributes is and the name is a shorthand pointer to that shared understanding.

Chris: David, this whole thing has been absolutely fascinating and I'm really excited just to learn for my purposes or anyone's purposes, what I really like is that this is a wide-open choice because differentiating is hard and I might have thought before this conversation that there were right choices and wrong choices for any company but it sounds like it's more about making a choice and sticking to it and then and making that happen.

David: That's correct. It's about making a choice and sticking to it. But, of course the choice has to be made very carefully. You can choose something that's really...that's just plain wrong. So archetypes for a while and marketing [inaudible 00:29:07] were the flavor de jure.

They were the quick thing that people would latch onto and then a year later they were gone. I think the way archetypes can be used and the way we're using them with our employees, we're following up with measurement. And so we're seeing the increase in uptake among employee groups and that's really changing the culture of a company and that I think is where marketing can be most powerful.

I really appreciate the opportunity to come on your podcast. Thank you so much.

Chris: My pleasure. So where can someone go, whoever's listening, where can that person go to learn more about this?

David: So there are a couple of places that I can point you to. First is our website www.FormaLifeScienceMarketing.com. That's a long one but it's really good for SEO and secondly you can take a look at my book, "Making the Complex Compelling: Creating High-Performance Marketing in the Life Sciences." It's available on Amazon. Chapter 10, I believe is about archetypes.

Chris: Okay, I will put links to both of those in the show notes and once again, thanks very much for joining us.

David: Chris, thank you so much for the opportunity. Best of luck.

Chris: My pleasure.

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