

**Roland Berger**  
Strategy Consultants

**RB Profiler** – a proven, neutral  
and quantitative methodology to  
develop, evaluate and implement  
brand and marketing strategies

Overview

December 2007

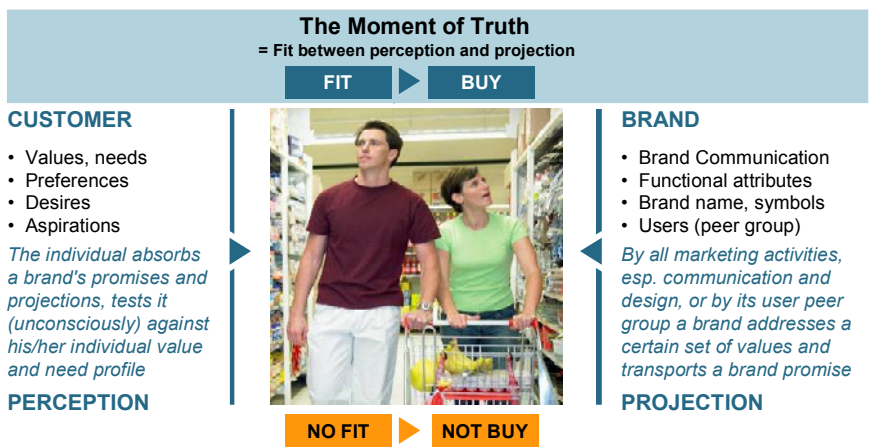
**RB PROFILER – NEW DIMENSIONS FOR MARKETING**

With RB Profiler, Roland Berger Strategy Consultants has developed a unique and internationally successful approach to strategic brand management and market development. The methodology applies the established theoretical principles of self-congruence theory. The consistent, quantitative instrument delivers answers to the key questions of brand management – from segmentation to brand strategy and operational marketing-mix implementation.

**THE LOGIC**

Everyone has their own complex, individual system of values and attaches different importance to different values. This results in individual value profiles – one person may be particularly emotional, playful and fun-loving, while another is completely rational in their decisions; a third person may feel that performance and prestige are especially important. On the other side of the coin, each brand conveys certain values in the form of a brand proposition. A brand projects a set of values into the market through its brand name and logo, communication, advertising, product design, services offered, price policy or choice of POS. At the moment when a consumer decides to buy a product – the "moment of truth" – these two value systems converge: the consumer tests the brand's promises against his or her own values and needs (usually subconsciously). The closer the fit, the more likely the consumer is to buy the product. Successful marketing is a matter of knowing as much as possible about your target group's value profile and aligning your brand proposition to the values it reflects.

**Fundamental hypothesis of the RB Profiler – our brand philosophy is based on the congruence of customer and brand values**



Source: Roland Berger, Brand Congruity Theory

MUC-81010-783-01-31-E.ppt | 1

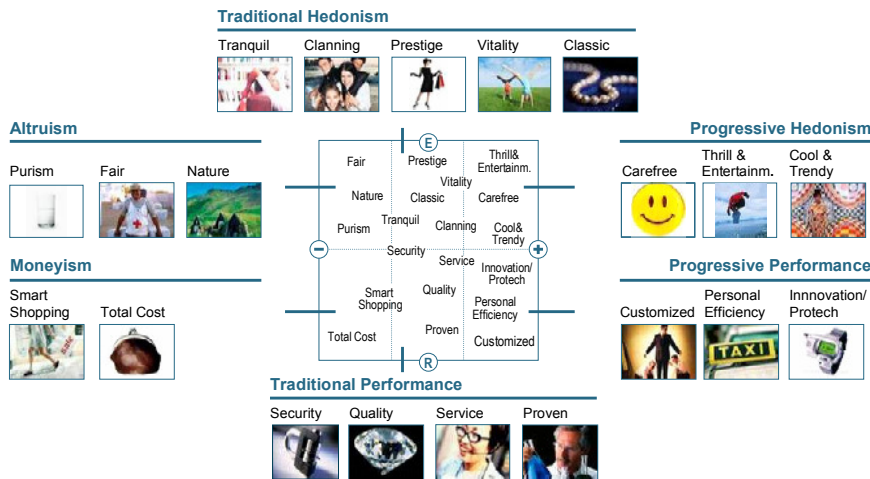
**FIG. 1: THE MOMENT OF TRUTH: DOES A BRAND'S PROMISE FIT WITH THE CUSTOMER'S VALUES?**

**THE METHOD**

RB Profiler is based on extensive qualitative and quantitative market research involving over 250,000 interviews in more than 35 countries and almost all B2C industries. In excess of 10 years' experience also went into its development. At the core of RB Profiler are 20 fundamental values describing all aspects of people's consumption behavior. These values were arranged in a two-dimensional space based on their statistical correlation, with related values close to each other and those seldom found together placed further apart. This results in a matrix with an inherently logical configuration of values. Its axes measure emotionality or rationality on the one hand and minimalism or maximalism on the other. The matrix is divided into six fields, each of which stands for a certain group of values, making it very easy to understand. The six value clusters are altruism, traditional and progressive hedonism, moneyism, and traditional and progressive performance.



20 general customer values, desires and aspirations are used to measure the needs of customers and values addressed by brands



MUC-81010-783-01-31-E.ppt | 2

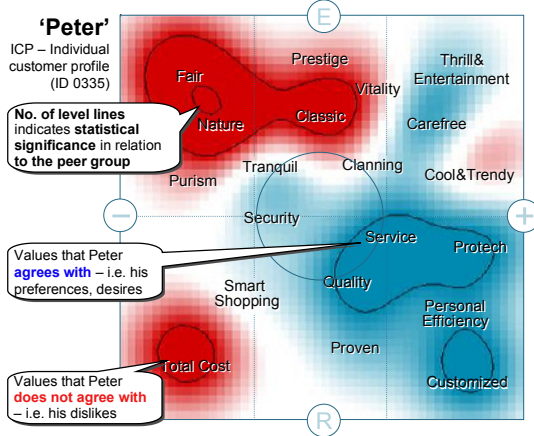
FIG. 2: RB PROFILER VALUE SYSTEM

Each of these six groups consists of between two and five practically tested, precisely defined and relevant fundamental values. The altruistic values, for instance, are Fair (high ethical standards, need for social justice), Nature (high ecological standards, affinity to nature) and Purism (minimalism, understatement, rejection of waste and excess). On the opposite side of the scale, the values of progressive performance are Customized (need for individuality, uniqueness, flexibility), Personal Efficiency (systematic comfort, efficiency, availability and speed) and Protech/Innovation (pioneering spirit, fascination for innovations and the latest technology). All of the values are elicited from consumers using carefully developed, tried-and-tested,

indirect statements. This largely rules out measurement fuzziness such as politically correct answers. All of the value attributes can be measured and validated quantitatively.

The RB Profiler methodology allows to measure, visualize and analyze the values and desires of individuals or groups of people

Example: Individual customer profile "Peter"



Interpretation

- Peter is a **very modern, progressive** person
- He finds new, **innovative technology very thrilling** and demands **customized, service-oriented** and **top-quality** products
- **Money is not an issue** for Peter – he is ready to spend
- **Classical or ethical values do not matter** for Peter – he is **open to new things** and does not worry about society or the environment

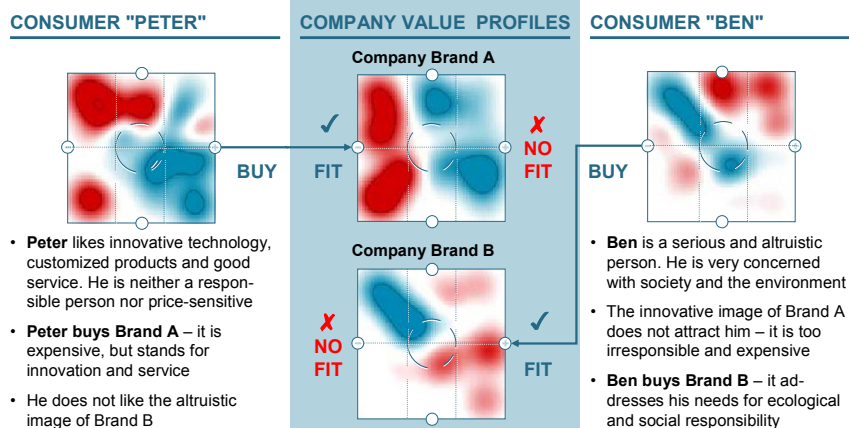
Source: Roland Berger

MUC-81010-783-01-31-E.ppt | 3

FIG. 3: VALUE PROFILE OF AN INDIVIDUAL

The values addressed by companies can be measured in the same way – this information allows to forecast consumption behavior

Understanding consumption behavior



Source: Roland Berger

MUC-81010-783-01-47-E.ppt | 12

FIG. 4: UNDERSTAND AND FORECAST CONSUMPTION BEHAVIOR

This integrative method measures, visualizes and analyzes the value profiles of people and groups as well as those of brands. The value system of one or several persons can therefore be tested directly against a brand's value proposition. This enables the question of how well brands address certain target groups to be answered and quantified objectively. The general tendency is easy to make out straight away as a result of the clear visualization. Directly comparing the brand proposition of your own brand(s) with those of competing brands is also very straightforward. Analyzing the value profiles of brands and target groups allows the consumption behavior of individual target groups to be predicted reliably. As a result, RB Profiler gives you an important basis for developing successful brand and marketing strategies.

**APPLICATION IN PRACTICAL MARKETING**

RB Profiler delivers objective, quantifiable insights for the entire process from segmenting the market and target groups to developing and evaluating the brand strategy, implementing it in marketing and sales concepts, and measuring success. Combined with detailed demographic, economic data as well as on buying and consumption behavior, it opens up a whole new world of possible applications by directly linking the strategic and operational aspects of market development.



The RB Profiler provides one integrated methodology and language along the complete market strategy process

Areas of application

**MARKETS & CUSTOMERS**

- Market, customer and competitor analysis
- Market and customer segmentation
- Economic assessment of market and customer segments/ potentials
- Customer insights – comprehensive customer understanding
- Competitor analysis

- Analysis of effectiveness and efficiency in marketing & sales
- Marketing Controlling: measurement of Brand & Marketing KPIs
- Business planning
- Campaign & response tracking

**MEASUREMENT & CONTROLLING**

Source: Roland Berger

**BRANDING**

- Analysis of actual brand perceptions of own and competitor brands
- Development of future/target brand positioning

- Review and development of brand strategies
  - Brand portfolio/ architecture
  - Brand extension

- Review, development and evaluation of marketing communication, pricing or sales/POS concepts
- Strategic campaign management
- Product and service design

**MARKETING & SALES**

- Sales activation concepts
- Loyalty concepts

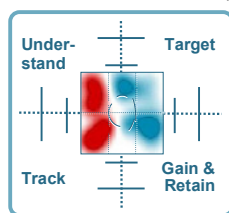


FIG. 5: RB PROFILER AREAS OF APPLICATION

MUC-81010-783-01-31-E.ppt | 5

## ADVANTAGES OF RB PROFILER AT A GLANCE

- High quality brand strategy: The challenge of every brand strategy is to make sure that the brand meets the customer's needs. RB Profiler provides the necessary know-how – objective and quantifiable.
- Basis of the entire market strategy: With RB Profiler, all the elements necessary for developing the market (e.g. brand, communications, pricing and POS strategy) can be evaluated in substantive and economic terms. The monetary effects of brand and marketing strategies can be validated using the comprehensive consumer data.
- Strategy and implementation from one source: The market approach can be directly followed up with implementation. Extensive data on customers' consumption and media use makes it possible to effectively design and implement the marketing mix.
- Integration and greater efficiency: The entire process from segmentation to the brand and marketing strategy followed by implementation is highly complex. Various corporate departments and external providers are involved, which automatically leads to inefficiencies and interfaces. The cooperation between RB Profiler and Burda community network ensure that all involved parties use the same database and speak the same language, thus saving time and money.
- Greater application flexibility: With RB Profiler, you can analyze existing segmentation approaches (e.g. using socio-demographic criteria such as best agers or women), easily add value profiles or develop entirely new, value-based segments.

Interested in the RB Profiler? In case of any questions or further need for information, please do not hesitate to contact us. We are looking forward to get in touch with you!

# Interest, comments or questions?

We look forward to get in touch with you!

## Roland Berger Strategy Consultants



**KAI HOWALDT**

Tel. +49 (0) 89-9230-8219  
Mobil +49 (0) 160-744-8219  
Fax +49 (0) 89-9230-8569  
kai\_howaldt@de.rolandberger.com

## Roland Berger Strategy Consultants



**RAINER BALENSIEFER**

Tel. +49 (0) 211-4389-2158  
Mobil +49 (0) 160-744-2158  
Fax +49 (0) 211-4389-2256  
rainer\_balensiefer@de.rolandberger.com

## Roland Berger Strategy Consultants



**ADELE HUBER**

Tel. +49 (0) 89-9230-8524  
Mobil +49 (0) 160-744-8524  
Fax +49 (0) 89- 5485-8524  
adele\_huber@de.rolandberger.com

## Roland Berger Strategy Consultants



**DORIT POSDORF**

Tel. +49 (0) 211-4389-2150  
Mobil +49 (0) 160-744-2150  
Fax +49 (0) 211-4389-2256  
dorit\_posdorf@de.rolandberger.com