

# The Definitive Guide to Global-to-Local Marketing

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# Introduction

“I want to have one billion individual relationships,” says Chief Marketing Officer Keith Weed, describing the mandate he set for his global team at Unilever. But for any global company — let alone one with dozens of global brands and operations in hundreds of local markets — this is certainly easier said than done.

While technology has made marketing increasingly global — even the smallest companies can reach potential customers around the world — it has also caused consumers to expect content to be tailored to their lives and interests. Global brands often face a trade-off in their marketing between regionally produced content that reflects the lived experience of the local customer and centrally produced content that can be deployed at scale and reflects consistency in brand voice, feel, and values.

Furthermore, today’s largest global organizations are marketing at the intersection of brands and regions. A single company may be negotiating regional variance in culture, language, channels and compliance, while also controlling for variations in the visuals, values, and target customers of their portfolio brands. This additional layer of complexity only exacerbates the challenges of global-to-local. In many organizations, increased complexity correlates with a decrease in management visibility, efficient cross-team collaboration, and governance around consistency, quality, and usage. This can leave many aspects of marketing exposed to human error and individual judgement.

Brands with high levels of marketing complexity need a carefully crafted global-to-local strategy — one that “locally adapt[s] a universally embraced core idea that will resonate in any market anywhere in the world.”

Excelling at global-to-local marketing has three core phases:

- 1. Defining your master brand**
- 2. Structuring your team**
- 3. Structuring your workflows**

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# Defining Your Master Brand

The primary anchor elements of a brand are its vision, mission, and values – the three attributes that underpin corporate identity and purpose.

Messaging around the core ideas of your company – what we'll refer to as your master brand, a term coined by brand consultant Denise Lee Yohn – offer a wide range of benefits for your organization. For global companies, a strong master brand can:

1. Help leverage economies of scale in creative development and media buying, as a master brand strategy prioritizes mass marketing.
2. More efficiently build mental availability for all portfolio brands, as consumers need only recall single global brand to access a range of ideas about specific products or subsidiaries.
3. Increased product flexibility, as existing subsidiaries and future acquisitions can leverage off the brand equity of the global parent.
4. Improve customer retention, as a well-developed master brand enables corporations to build lasting customer relationships that go above and beyond any single product or brand.

In recent years, there has been an increase in the number of global companies promoting their master brand over individual product brands. For example, Unilever has developed corporate messaging around social and environmental responsibility. Initiatives like "Farewell to the Forest" spread the word about the values of Unilever's brand identity as a company, above and beyond its brands and products. Portfolio brands, then, create brand and region-specific campaigns that ladder-up to this core idea. For instance, Dove's "Curly Hair Emoji" campaign tackles the social issues related to beauty standards for women. The campaign reflects a) the Unilever value of engaging with social issues globally b) the Dove brand value of promoting "real beauty," and c) the needs of consumers in the market in which it was released – 1 in 3 American women have curly hair.

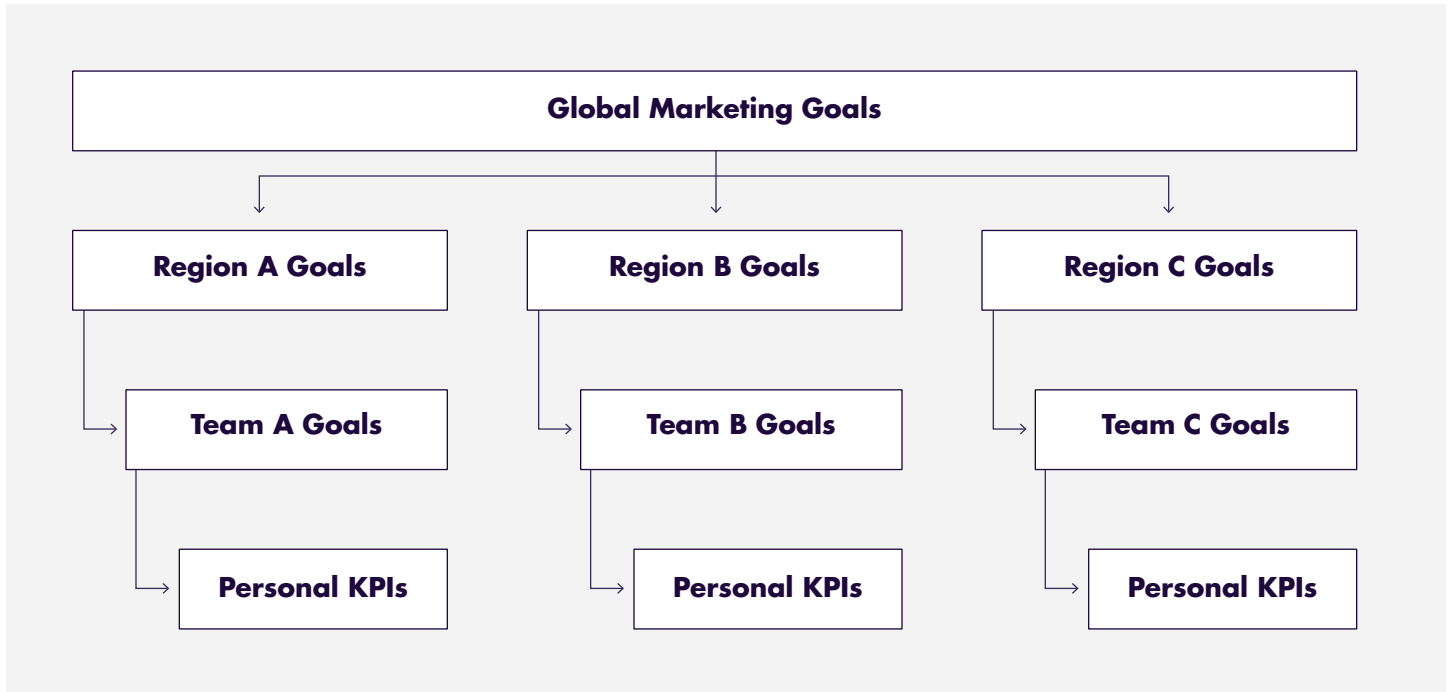
“[Building a master brand] is definitely a two-way or multi-way street – all brands within a portfolio have mutual interests and each should work to leverage its own equity in service of the others while tapping into the equity of others.”

–Denise Lee Yohn

Before thinking about localizing or tailoring your marketing to a region, you need to know what will be the common thread between all of your subsidiary brands and local markets. The brand pillars — like the mission and vision — that advertisements evoke should be the same across the world. Unilever’s vision, for instance, is to make sustainable living commonplace. Nike’s vision, on the other hand, is to inspire the athlete in everyone, so its messaging speaks to inspirational athleticism no matter where it advertises. If your brand vision and mission speak to a human need or fundamental truth, you can find ways to tell that story in any culture or language. Achieving consistency and aligning all teams requires a system to centralize strategy, distribute information, and collaborate on creative around the world.

# Structuring Your Team

## Organizational Structure



Many of the brands we work with that excel at global-to-local marketing operate under a dual reporting and workflow structure. Local marketers most often report on a day-to-day basis to the regional or country General Manager – not the global marketing or digital leadership. Campaign development and workflows, however, are led by a global brand hub or center of excellence – often located in the global headquarters. This team has three primary responsibilities when it comes to managing global campaigns:

- Be the steward of the brand strategy, guidelines, and values – driving global alignment with priorities of the Chief Marketing Officer.
- Create global campaign briefs that are distributed to and executed on by the local markets.
- Facilitate coordination between local markets – identifying opportunities for local-to-global and local-to-local sharing.

Regional markets often have a brand director or general manager, who is responsible for executing on the localization mandate set by the brand hub. This could be as simple as translating and distributing pre-approved content or as complex as coordinating with local creative agencies to produce on-brand content that fulfills the brief set by the global leadership. The regional team would then be tasked with appropriately distributing content through the channels best suited to consumers in that market.

Marketers working at the global level know that not all regions have the same needs and capabilities. One of the challenges for global-to-local marketing is finding a framework that supports regions at various stages of “market maturity.” Depending on your business, regions may differ on maturity metrics such as budget for localization, distribution channels, or access to technology – directives delivered to local markets by the global team should reflect this. Marketing leadership must implement a system for assessing market maturity across regions, then dividing regions along the most appropriate maturity metric to optimize campaign relevance and actionability.

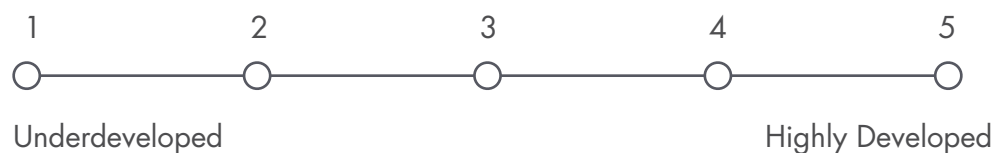
One Percolate customer, a global beverage company, segments its regional teams into stages based on the market share the brand has in that region. Campaigns created by the global hub are shared on the basis of the business goals for regions in a particular stage. Each campaign includes a deck of information on the goals of that stage and how assets should be deployed to reach those goals. Up-and-coming markets who want pre-approved, on-brand content that they can easily access and share across their channels will get certain campaigns, while developed markets who only need strategic direction will get others.

# Market Maturity Template

Use the following template to structure your thinking about measuring market maturity across regions and tailoring your campaign briefing strategy to local needs.

	Market 1	Market 2	Market 3	Market 4
<b>Track Record</b> Historically how successful has the execution of global-to-local initiatives been in this market?				
<b>Market Share</b> Where is this market on its growth story, and what is the local competitive landscape?				
<b>Budget</b> What are the resources available to the regional team?				
<b>Technology</b> How digitally mature are the marketing operations in this region?				
<b>Regional Organizational Structure</b> Does this region have the human capital, agency support, and leadership to execute and approve this campaign?				

For each metric, grade your markets on a scale from 1 to 5.



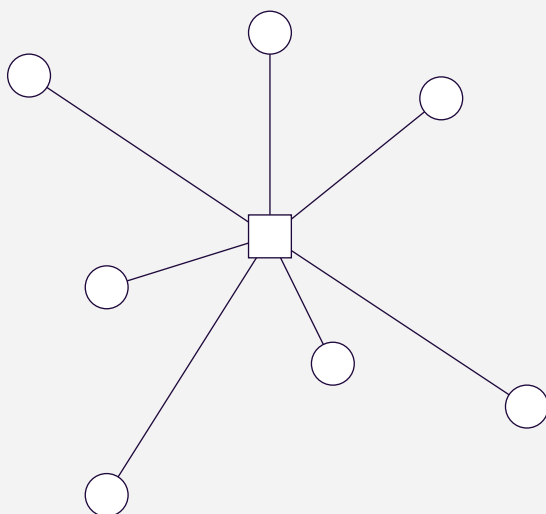
## Collaboration Structure

Despite the prevalence of brand hubs in the structure of global marketing organizations, it is important to distinguish the way an organization is structured on a personnel level from how global teams share information. From our experience working with global brands across different industries, we see two types of information sharing models within marketing organizations. In the Hub-and-Spoke model content from the corporate headquarters flows out to regional teams, providing them brand guidelines to execute on their local mandates.

In the more interdependent, Neural Network model, brand campaigns and content are shared between global HQ and regional brands as well as region-to-region, allowing for adaptive learning about what's working and what isn't. This cross-regional sharing enables faster change at the local level. For more sophisticated information sharing in an increasingly global marketplace, you can expect to see more brands seeking systems and processes that allow for the flexibility of a neural network model in the future. This means that while there may be a central team setting the strategy and helping the global teams coordinate, the local markets don't necessarily rely on this hub to collaborate and share campaign information.

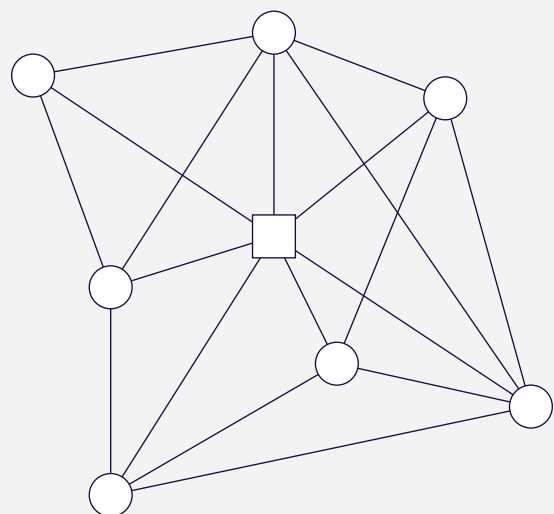
**Good**

**Hub and Spoke Model**



**Even better**

**The Neural Network**





One of Percolate's global consumer electronics customers found that better reporting from and across markets helped them identify similarities in mobile consumer behavior between India and Indonesia. The brand's global digital team spotted this trend and connected the local teams in both markets, so each could share resources, creative assets, and best practices with one another. Using this insight, the brand started piloting smaller media buys and content tests in Indonesia, which, when successful, could then be localized and scaled up for Indian mobile users. This enabled distributed learnings, better cross team coordination, cost savings, and better transfer of knowledge.

To begin rethinking the way your teams share information, whiteboard your universe (and flow) of the following:

- Objectives and KPIs
- Brands, segments and product lines
- Teams, reporting and accountability
- Content
- Data

Once you map out how information flows within your department, region, or reporting structure, gather and focus organizational resources on improving the flow and transparency of content and data.

Content should be managed and distributed through a permission-based digital asset management system (DAM), while business intelligence (BI) reporting tools like DOMO, Tableau, or Looker can help centralize and democratize reporting by connecting fragmented data sources and CRM information. A platform like Percolate can take this connectivity a step further, linking content and analytics flows across the organization, mapped to its reporting and collaboration structures.

The more leaders can align marketing's reporting accountability with collaborative (creative execution) accountability, the better positioned an organization is to improve operating performance and brand growth. Having a central repository for storing, sharing, and distributing content is a key start for promoting transparency and asset re-use to scale brand standards and best practices.

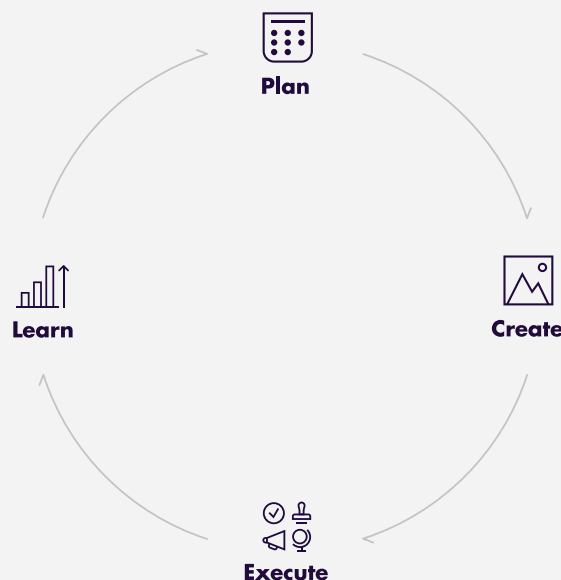
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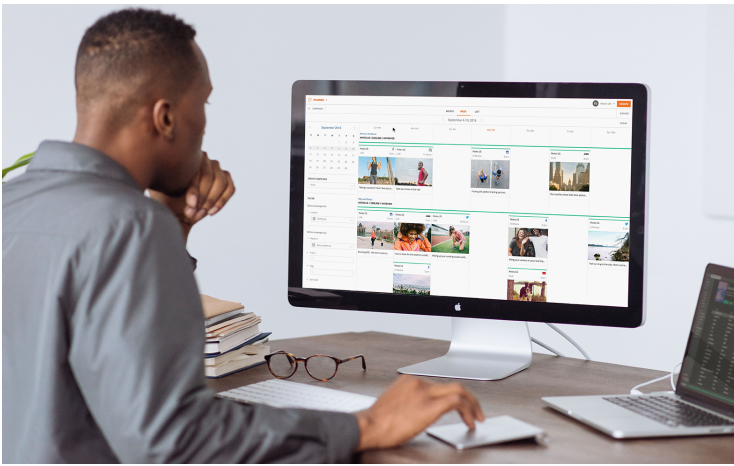
# Structuring Your Processes

To optimize your marketing at a global scale, think in terms of an “operating system” that sits between the brand’s global narrative and the work of local markets and agencies. This operating system is a combination of people, processes, and technology that keep regions aligned on the brand’s core narrative and values, even as they are localized in various campaigns. The system you have in place can facilitate global coordination in at least four ways:

1. Provide visibility into scheduled campaigns around the world, to understand at a glance how the brand is being represented.
2. Provide a means to share photos, videos, and other assets between regions, to keep brand elements consistent and reduce the cost of having to purchase visuals at the local level.
3. Facilitate the sharing of entire campaigns from region to region, so that successful initiatives don’t stay confined within one area.
4. Make it easy to find and discover new brand guidelines that work in one region and can be applied elsewhere.

This “operating system” should improve global-to-local capabilities at all stages of the marketing process – from planning and creating to executing and measuring. Use this four-step framework to build and operationalize your system for global-to-local marketing:





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# Plan

Executing a successful global campaign is all about being proactive rather than reactive. To start, global organizations should use a dynamic marketing calendar – free from versioning issues – that not only offers complete visibility into what local markets are planning, but also enables regional marketers to see and learn from the work of their peers and corporate teams.

Furthermore, planning isn't just a matter of scheduling content – it's also about structuring your workflows in anticipation of later stages of the campaign process. Senior leadership should be able to customize campaign data to reflect strategic initiatives, brand pillars, or product lines, enabling teams to organize all their marketing with measurement in mind and allowing them to visualize their calendar accordingly. Your entire organization should treat optimization as an upstream as well as a downstream process by keeping brand guidelines and KPIs top of mind as they plan campaigns.

Marketing teams tend to have a core set of campaign activities that they do over and over again, like creating and distributing a television advertisement, executing a social media campaign, or launching a product.

To eliminate repetitive work, global brand leaders should implement brief templates for the most common types of campaigns (i.e. social, events, TV). A customized template will provide any marketer writing a campaign brief – no matter what region – a standard set of questions to answer prior to submitting the brief for approval. Digital brief templates may offer additional automation features such as automatically assigned tasks, automated progress updates to stakeholders, and other collaboration tools.

But not everything about global campaigns can be completely automated. Each campaign needs an individual brief that can be created by global and distributed to local markets for execution – or created by local markets and sent back to global for approval or repurposing. The brief is your team's true blueprint for the creation and execution phases, as well as being an important tool for measuring success and repeating that success in future initiatives. A disciplined briefing process across the organization is essential for aligning campaigns with the master brand and leveraging global scale to not only market more efficiently, but to market better. To get started, use this [template](#) to structuring your next marketing campaign.



## A Global CPG Company

For a leading global CPG brand, Percolate is the operating system where global teams plan campaigns for their portfolio of brands.

Over the last three and a half years, ten of the company's largest global divisions have used Percolate. Prior to implementing a system of record for their marketing department, the global teams were planning campaigns and distributing briefs through a combination of emails, shared drives, and decks. This decentralized briefing method made it difficult to standardize and share campaign information across regions and for regional teams to leverage off of each other's work. Briefing is especially critical as the company partners with agencies both on the global and local level – controlling their brand involves monitoring content creators across the world who are not sitting in-house. With licenses customized to the architecture of the organization and specific templates designed to streamline briefing for their most frequent campaign types, Percolate has transformed briefing into a dynamic gateway for communication.

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# Create

Effectively scaling campaigns depends on your content creation and asset management process. For successful global-to-local coordination, asset management must fulfill three primary functions:

1. Facilitate the sharing of creative across teams
2. Eliminate version control issues
3. Allow for visibility into the final, localized product published by each region

Within your company's Digital Asset Manager, marketing leadership should define the parameters around metadata and taxonomies, ensuring all assets are organized in line with global structure and strategy. Global companies may have DAMs with millions of assets, which – if improperly tagged – won't be utilized by the local markets.

For instance, if your brand is an apparel retailer, you might want to ensure that marketers could easily access and distinguish between assets featuring various product lines. The correct taxonomic structure would enable marketing teams in various climates to select assets depicting seasonally appropriate products even though assets may be produced by global. Furthermore, internal and external teams need a centralized system to communicate and collaborate on asset creation, as well as track who is creating, editing, and using assets globally.

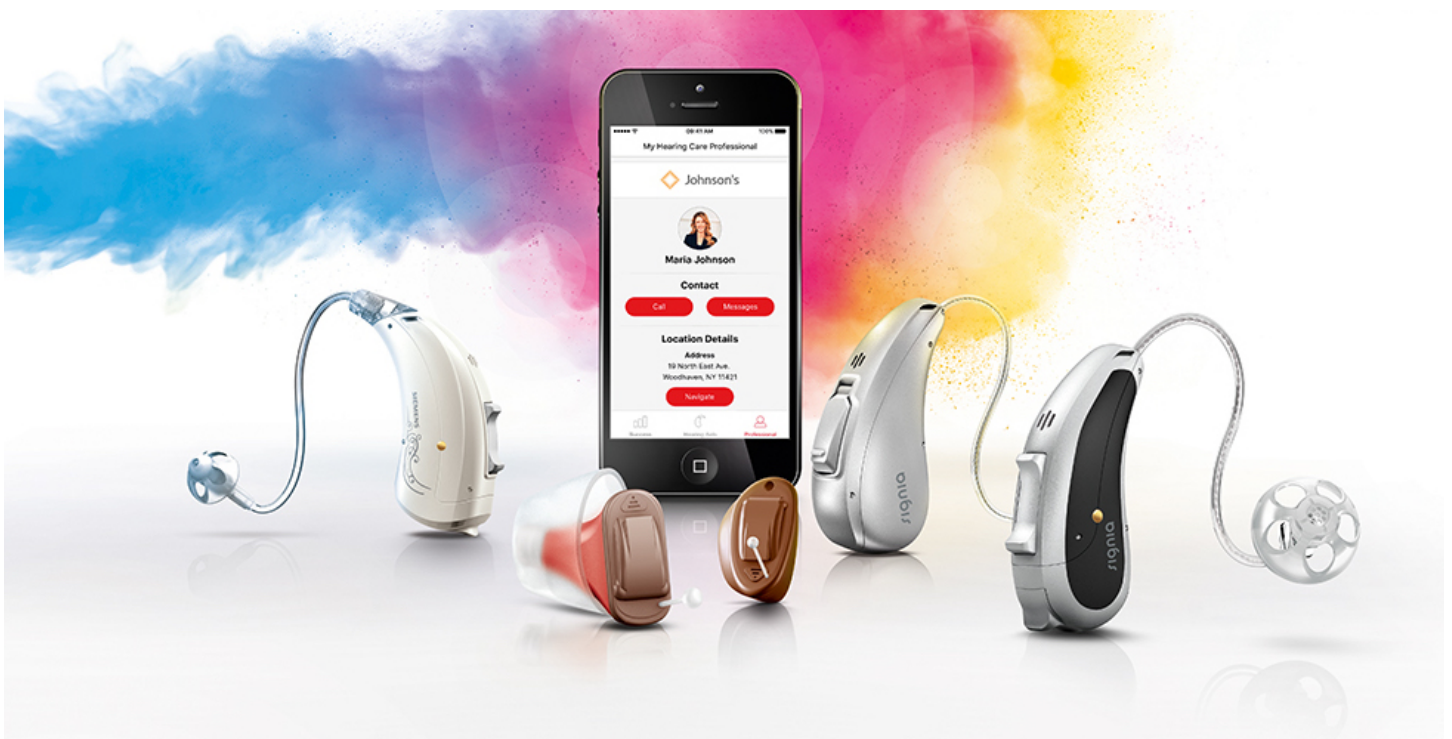
“Having GE's digital asset management integrated with marketing workflows has created a central resource for GE. Not only has it saved time and cut down inefficiencies in global processes, it's enabled teams to collaborate across business lines, regions.”

–Rich Narasaki, Director of Global Brand and Design, GE



The relationship between asset management and content creation is particularly critical when managing campaigns across regions. In many cases, campaigns should come with assets approved by the global team – it's the job of the regional teams to localize and combine assets into creative. Content creation processes should seek to reduce duplicate work across the organization and automate out low-value or repetitive tasks. Furthermore, creation processes should give leadership visibility over the published product – corporate shouldn't be finding out about localized content by seeing it on a live platform.

## Sivantos



Global hearing aid manufacturer, Sivantos, has developed an effective workflow for content creation on a global scale.

Collaborating in Percolate the Sivantos' global marketing team helps regional colleagues align with corporate messaging and communicate new product updates as they roll out cross-channel content. Percolate's asset management tool provides the global team with a single source of approved information on branding and messaging. With Percolate, Sivantos has a powerful tool to support local marketing, enabling them to create relevant, on-brand content for all regions, all while building a consistent global brand.

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# Execute

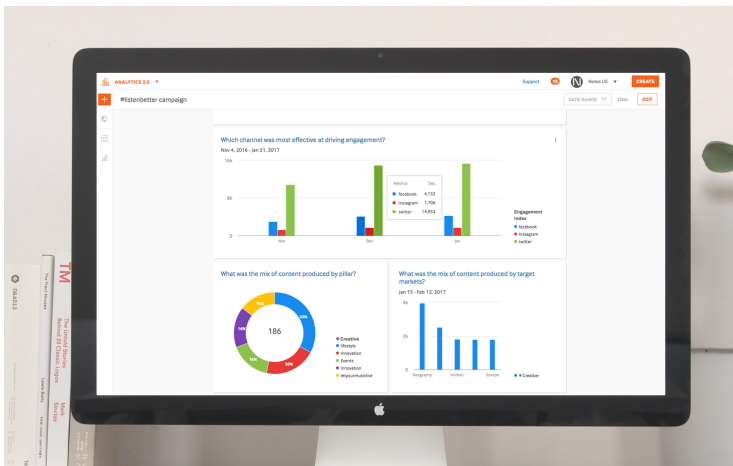
“Percolate ensures our team is aligned and executing against an omnichannel ‘one voice’ strategy in terms of both content planning and publishing, and visual identity.”

— Jennifer Stalzer, VP Global Digital Communications, Mastercard

When it comes to executing a global campaign at the local level, your brand guidelines should be baked into your team’s processes. The leadership should align on a standard set of brand prompts to help team members and agency partners self-regulate. These should be a set of qualifications that marketers ask themselves prior to hitting publish that help ensure creative is aligned with the most pressing global guidelines. Any aspects of the brand that can’t be standardized through distribution from the global brief, should be incorporated through this process.

For example, if you are an alcoholic beverage company, you could implement a prompt to ensure all content creators check that the “non-alcoholic” label is visible on creative intended for distribution in “dry” markets. Not only will this improve the quality and consistency of your content, it will also streamline approvals, saving management time and effort.





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## Learn

No process is guaranteed to work in every organization – so it’s important to actively monitor which internal processes and external initiatives are performing best against the KPIs you set in the planning phase. The problem global organizations face is that success metrics are often dispersed across dozens of platforms, and different regions may have different ways of measuring performance. Aggregating metrics across platforms and teams is labor intensive, so investing in a global analytics system is key to easily monitoring how content is performing at the local level.

For the global team, centralized metrics are critical for identifying opportunities for local-to-global and local-to-local sharing. Leadership should be able to visualize and compare performance by region, campaign, brand pillar, or customer persona, allowing for maximum discovery of trends and weaknesses. Furthermore, analytics workflows should be a two-way street, allowing local teams to benchmark their performance against a global standard or a peer region.

## Arla Foods

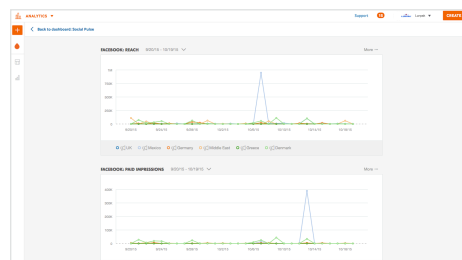
“Percolate has fundamentally transformed our way of working; now we have global production of assets to be reused across markets.”

— Thomas Heilskov, Global Digital Director, Arla Foods

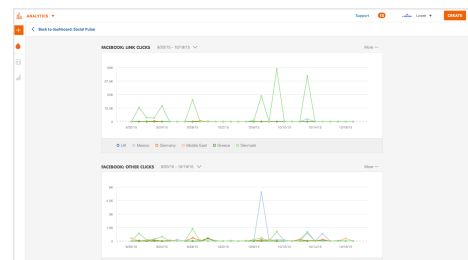
With production facilities in 11 countries and sales offices in 30, Denmark-based Arla Foods is the world’s sixth-largest dairy company. With such an immense scale of operations, getting KPIs aligned across markets is a major priority for the marketing team. With the goal of gaining actionable insights the team could adopt in real-time, Arla worked with Percolate to create a simple framework for global analytics. Each of their four custom dashboards maps to a form of audience engagement: Reached, Responded, Engaged, Connected. These pillars allow the team to see how audiences are interacting with their content globally on a number of social channels.

Ultimately, using its Percolate Dashboards, Arla leverages this knowledge to target customers where they are most engaged and to identify gaps it can fill with newer, more effective content. This gives the team visibility into the frequency, volume, and change in customer conversations over time so the team is “always on” with regards to customer needs. Not only that, Arla’s dashboards enable granular market analysis: global brand managers now have a clear view of how each of their markets are performing against others across their KPI pillars. Arla has gone beyond tracking just performance — they’ve created a system to make sure local teams are accountable to otherwise abstract KPIs. The visibility that these dashboards provide make for a more nimble, global marketing organization.

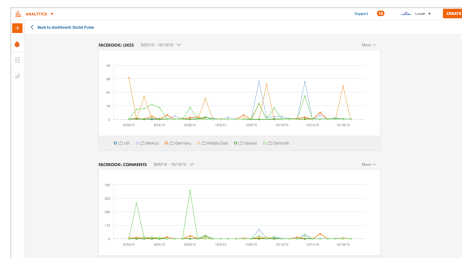
### Reached



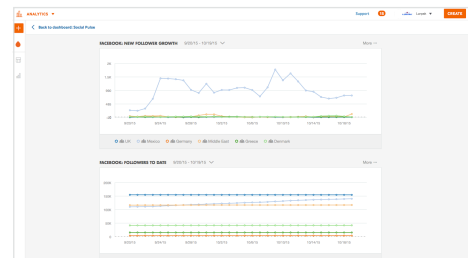
### Responded



### Engaged



### Connected



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# Conclusion

Technology has fundamentally altered the way marketers do their jobs and the way consumers experience brands. While your brand is more likely to be speaking to a global audience that audience is more likely to engage with content that feels local and specific. While attempting to solve the global-to-local conundrum, many brands may not realize the extent to which these challenges are caused by a communications gap between their global teams.

Through our work using technology to transform the way marketers at the world's largest brands operate at both the global and regional level, we have developed a framework for improving the way you manage your marketing globally.

1. Defining your master brand, align the voice, feel, and values of your subsidiaries with this central vision.
2. Structure your team to optimize global-to-local, local-to-global, and local-to-local information sharing.
3. Structure your workflows to enable global communication across the four major stages of campaign development: Plan, Create, Execute, and Measure.

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Percolate is The System of Record for Marketing.  
Our technology helps the world's largest and fastest-growing brands at every step of the marketing process.

Want to learn more?

Contact [learn@percolate.com](mailto:learn@percolate.com) for more information  
or request a demo today at [percolate.com/request-demo](https://percolate.com/request-demo)



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