

# GLASS BOX

# BRANDS

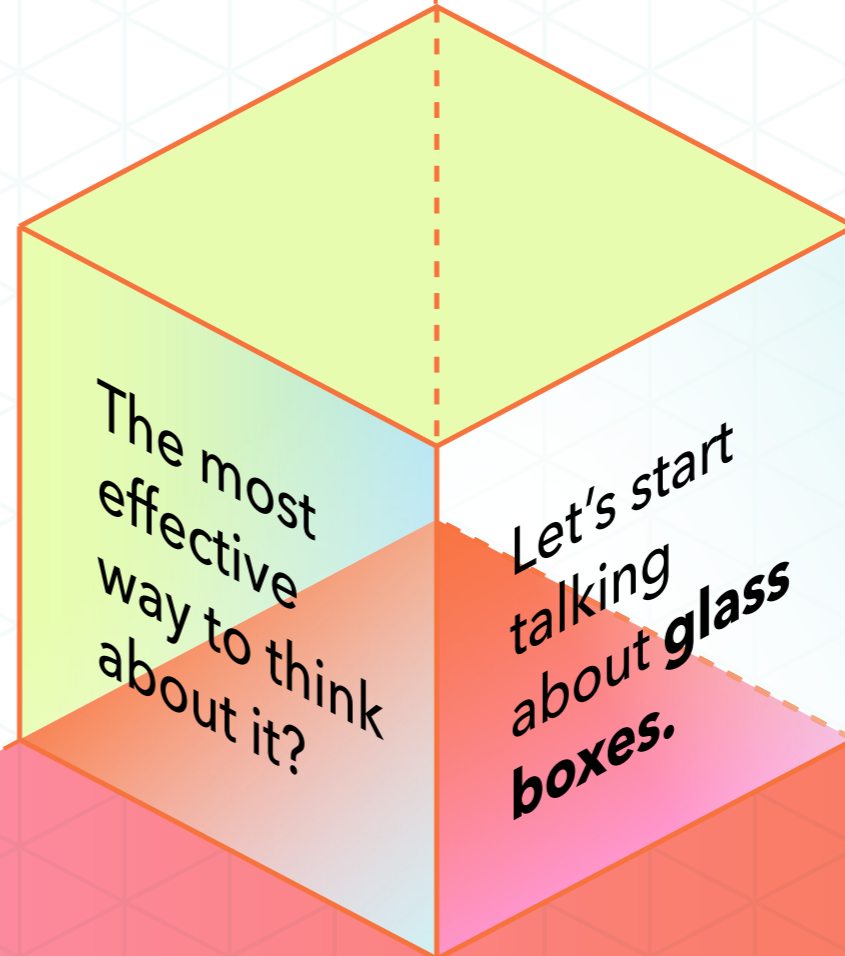
In an age of radical transparency, your internal culture is your brand. Time to take action!

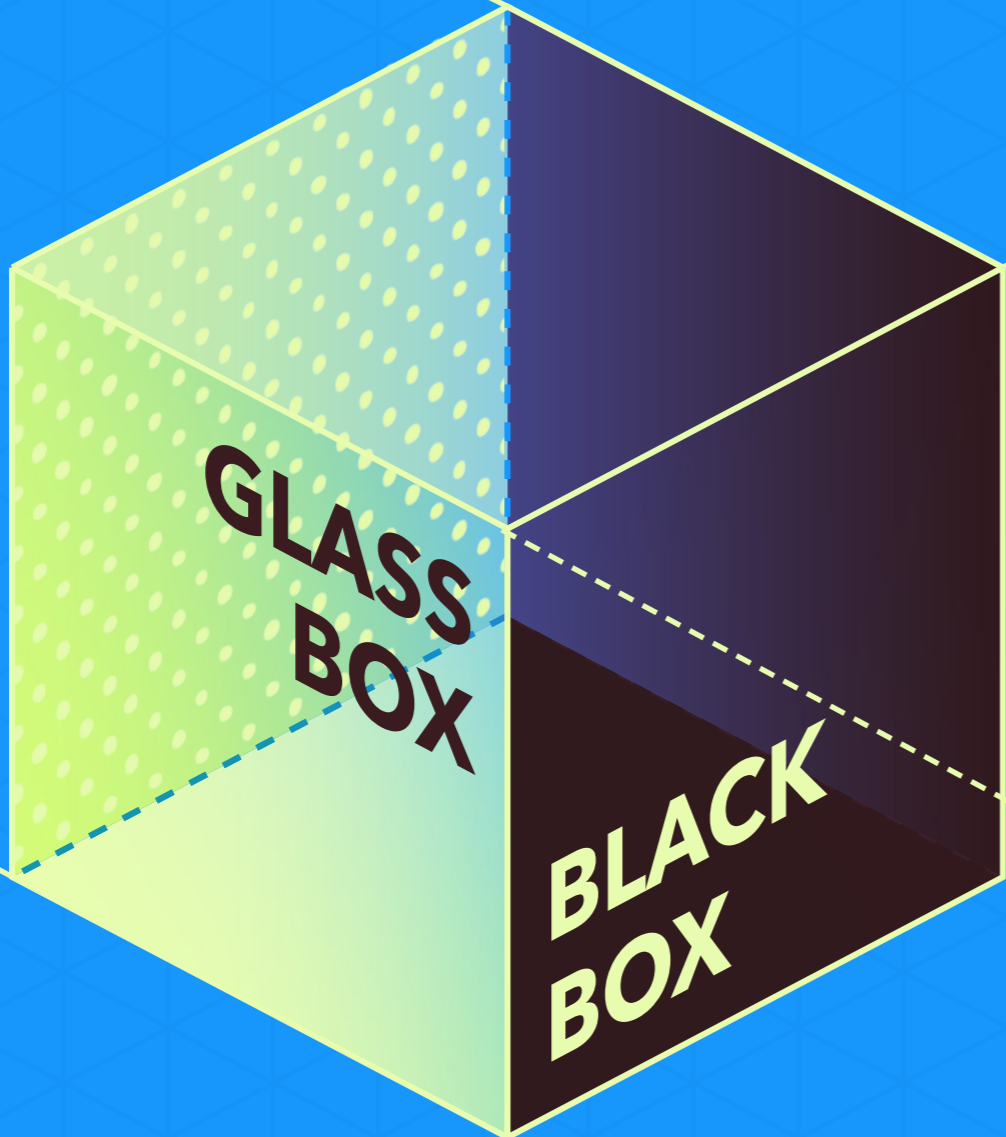


The founder of Uber resigns after a culture of sexism and bullying is exposed. The CEO of HSBC in Taiwan walks a gay employee down the aisle after her father refuses to attend her wedding. A smartphone video of United Airlines staff forcibly dragging a passenger off a plane goes viral.

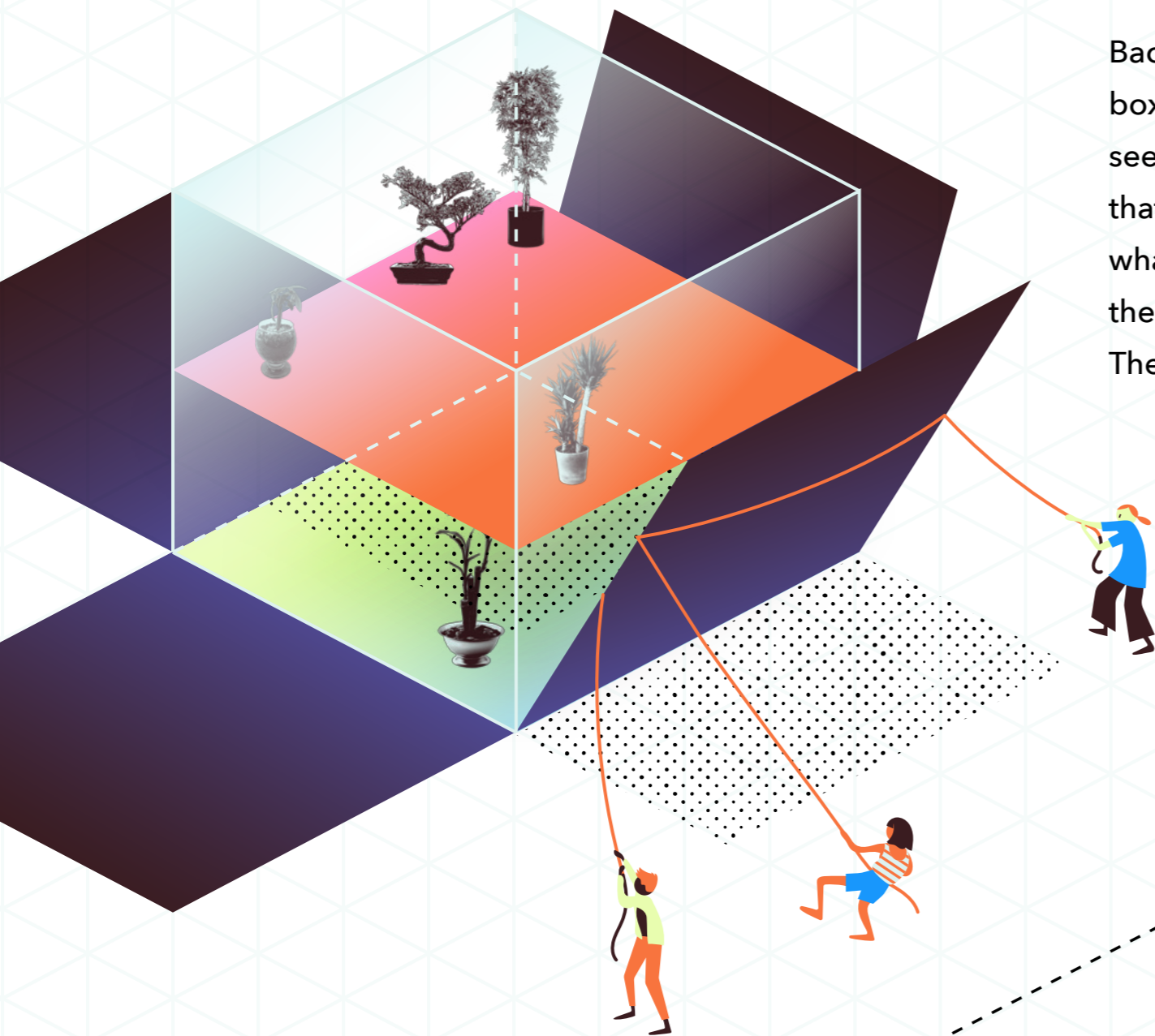
Just a handful of unrelated business stories? In fact, these three apparently unconnected stories are all examples of a single, massive shift in business and consumerism. One that's gathering speed by the day.

It's a shift in the very nature of what it means to be a brand. It presents a deep challenge, but also a massive *opportunity*. And one that no marketer, strategist, founder or CEO can afford to ignore.





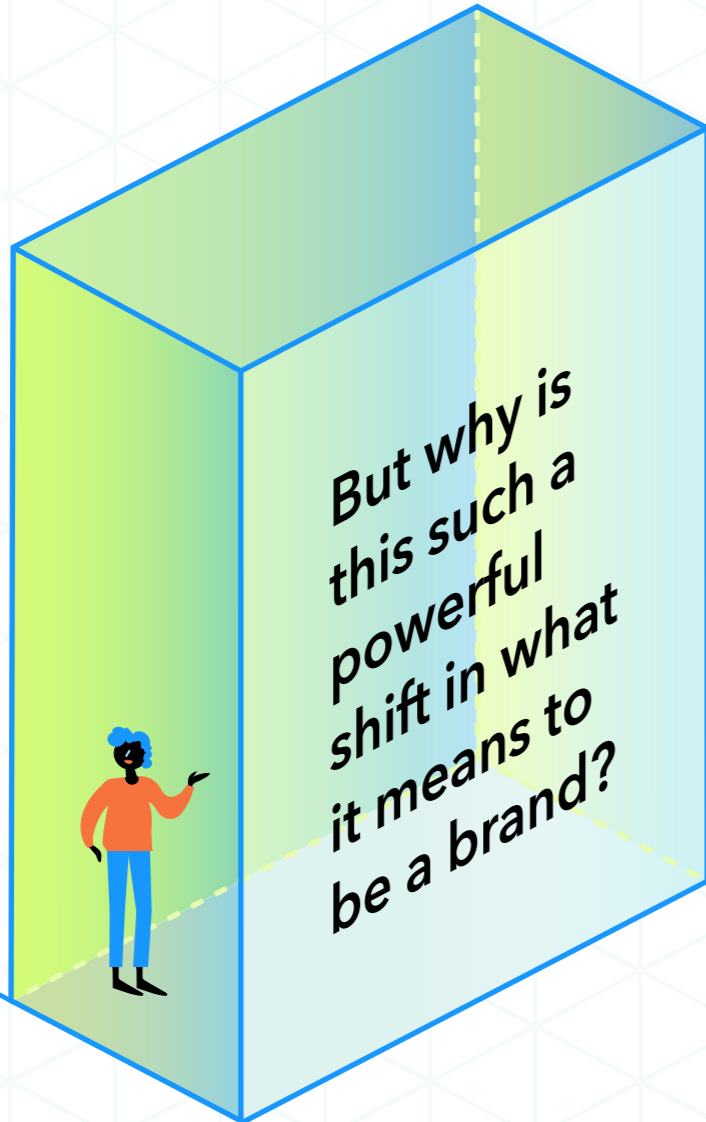
A brand used to be  
a black box. Now  
it's a glass box.



Back in the day a business was a black box. For outsiders, it was pretty hard to see what was going on inside. The *brand* that the business showed the world was whatever you painted on the outside of the box. People came and looked at it. They either liked it or they didn't.

## In 2017, a business is a **glass box**.

Outsiders can easily see inside. They can see the people and the processes. They can see the values. They can even see what the people inside the box *feel* about what they're doing. You already intuitively know the reason for that profound change. It's thanks to the radical transparency made possible by a connected world.



Take a moment to think about what a brand is. It's the emotional and associational touchpoints that consumers have with your business. It's what they see of you, and what that makes them *feel* about you.

Back when a business was a black box, the brand was limited to what was painted on the outside. The leaders of the business had a high degree of control over that. **But now that a business is a glass box, the brand is everything that's visible. Every person. Every process. Every value. Everything that happens, ever.**

Pretty scary, right? So buckle up, grab your CMO and your Head of HR, and keep reading...



**CULTURE  
CLUB**

In 2017 your  
corporate culture  
is becoming your  
brand.

You can sum up in a single word what people see when they look deep inside your organization.

*They see  
your culture.*



Once, your internal corporate culture was just that: internal. But now that a business is a glass box, there's no such thing as an 'internal' culture.

Whatever happens inside your business, the world can see that. Okay, not with perfect 20/20 vision. Plenty of mundane stuff happens every day that no one gets to know about. But if it's of any interest to anyone outside the box - from your Christmas Party to the ecofootprint of your largest factory - it will be seen. Maybe not right away, but eventually. And once people see it, they will feel something about it.





All of this is leading up to an unavoidable conclusion: **because your internal culture is now customer-facing, it's an important part of your brand.**

In fact, in 2017 your internal culture might be your brand's *most important attribute.*



The opportunity here? Your internal culture could become the most powerful brand and marketing asset you have.

Think about the power of stories such as those told by Starbucks: how they have a program to help staff in London raise a deposit on a home, or how they opened a store in Kuala Lumpur dedicated to hiring deaf people. Or that told by US-based yoghurt brand Chobani, which instituted paid parental leave for all staff after the birth of CEO Hamdi Ulukaya's first child.

The danger? Internal culture could also become your most powerful brand liability.



**But what should you DO about all this? To answer that question, it pays to take a fast deep-dive into transparency and other underlying forces that are making this change more urgent than ever.**

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**WHAT'S  
DRIVING  
THIS?**

Connectivity, job automation and the intensifying search for a more meaningful consumerism are all pushing the emergence of glass box brands.

# CONNECTIVITY

The overarching driver here? It's connectivity that has fueled the radical transparency that's given rise to glass box brands.

We don't need to spend long on a transformative force that you already know plenty about. But when it comes to the impact of connectivity on the emergence of glass box brands, three implications can be broken out.



**Employees now expect to document and share their lives online.** That includes their working lives! The culture of sexism at Uber was split open when an employee blog post went viral.

**Ever-more of day-to-day life is being captured in real-time video or livestreamed.** Increasingly, consumers don't just expect to know what's happening, they expect to see it! One glimpse? This smartphone video from July of unsupervised luggage crashing off a United Airlines conveyor belt ;)

**Consumers increasingly expect to see inside brands.** That was borne out when Havas surveyed 10,000 global consumers (see right).

*"somewhat or very important for a company to be transparent."*

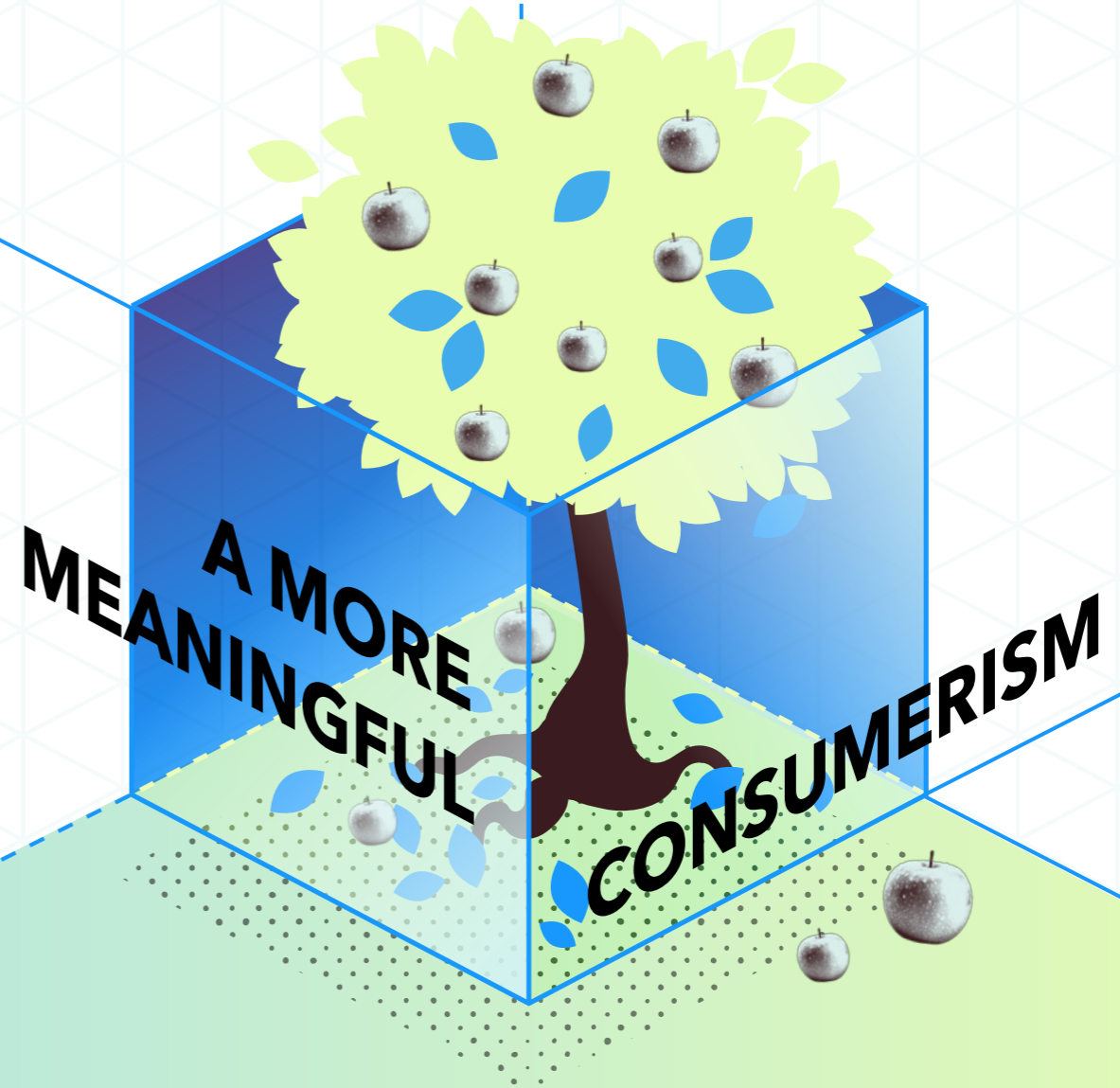
78%

70%

*"I make it a point to know more about the companies I buy from these days"*

It wouldn't matter that consumers can look right inside your business if they didn't care about what they saw. But in rising numbers, and with rising intensity, they do.

Millions around the world are searching for a more ethical, sustainable, meaningful consumerism. That's a sweeping mega-trend that we've all been tracking for decades.





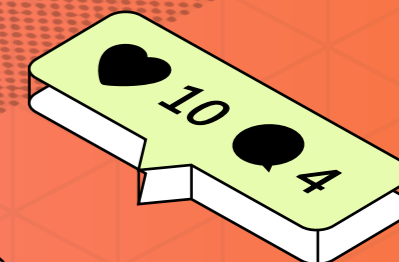
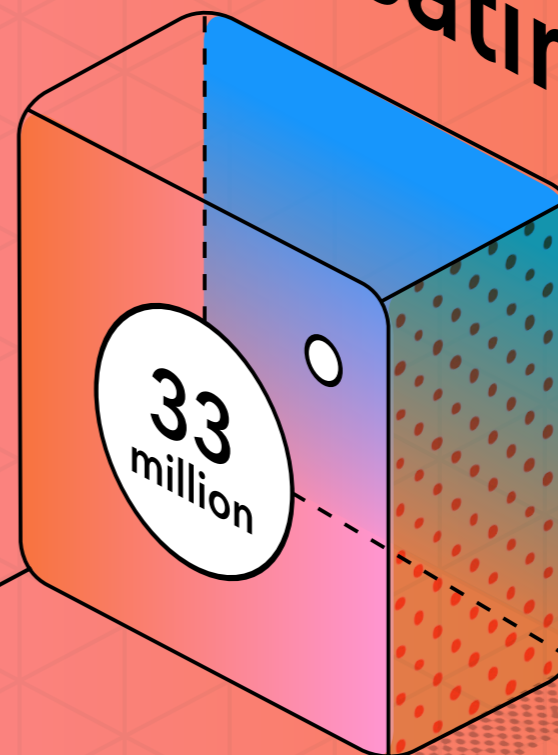
**So where is that  
mega-trend at now?**

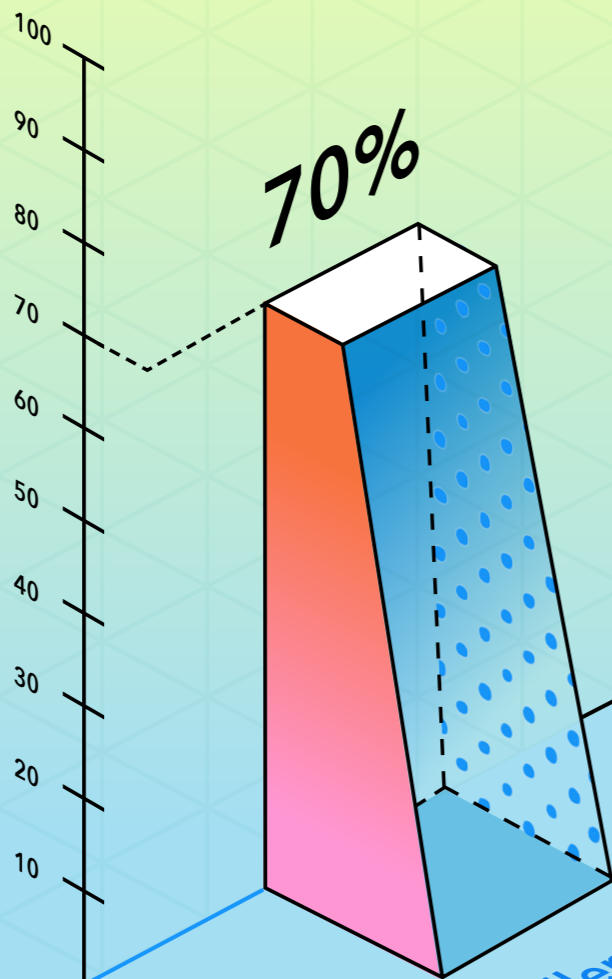
A connected world means it's ever-harder to ignore the negative impacts that our consumption has on the planet, society and our own health. And now, expectations for a cleaner, healthier, *better* consumerism are being heightened by a new wave of more ethical, sustainable startups. Think buy one give one shoe brand TOMS. Or even electric automaker Tesla.



Meanwhile, in a world in which consumption choices are increasingly about creating a story of personal identity to tell ourselves and the world – I'm smart! I'm connected! I'm healthy! I'm ethical! – consumers care ever-more about the values, ethics and purpose of the brands they engage with. They need those values to tell a positive, status-accurring, Instagram-ready story about who they are and what they believe. See that in the 33 million Instagram posts tagged #cleaneating!

# #cleaneating



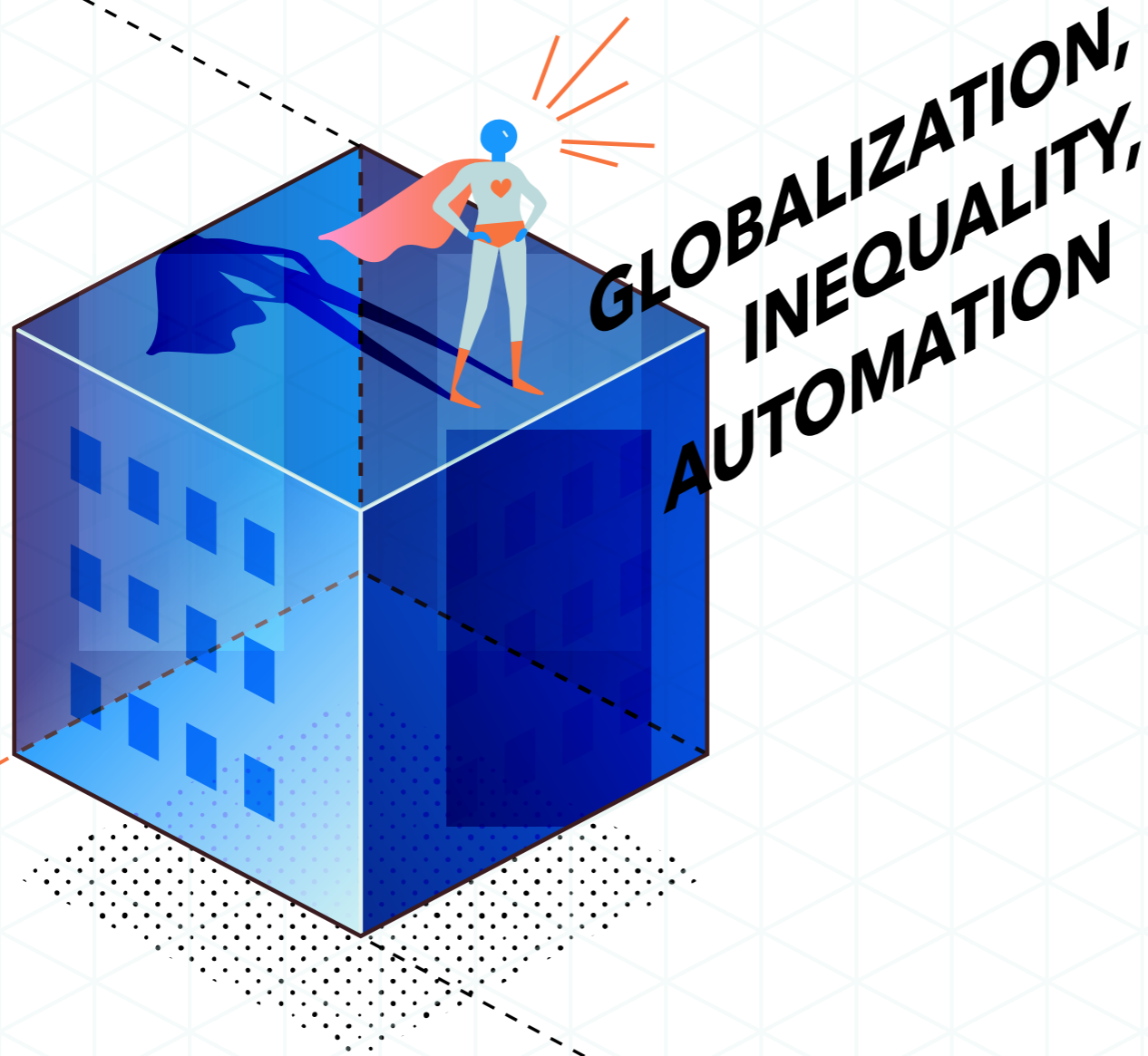


Millennials are willing to spend more with brands that support causes they care about.

Cone Communications, 2017

**What do you get when you put all that together? Rising demand that when consumers look inside the glass box that is your organization, they like what they see.** The processes you use, the people who use them, and the ethics and values that they reflect.

One snapshot? A full 70% of millennials are willing to spend more with brands that support causes they care about.



In 2017 concerns over the values and ethics inside brands are acquiring a new dimension, and a new urgency.

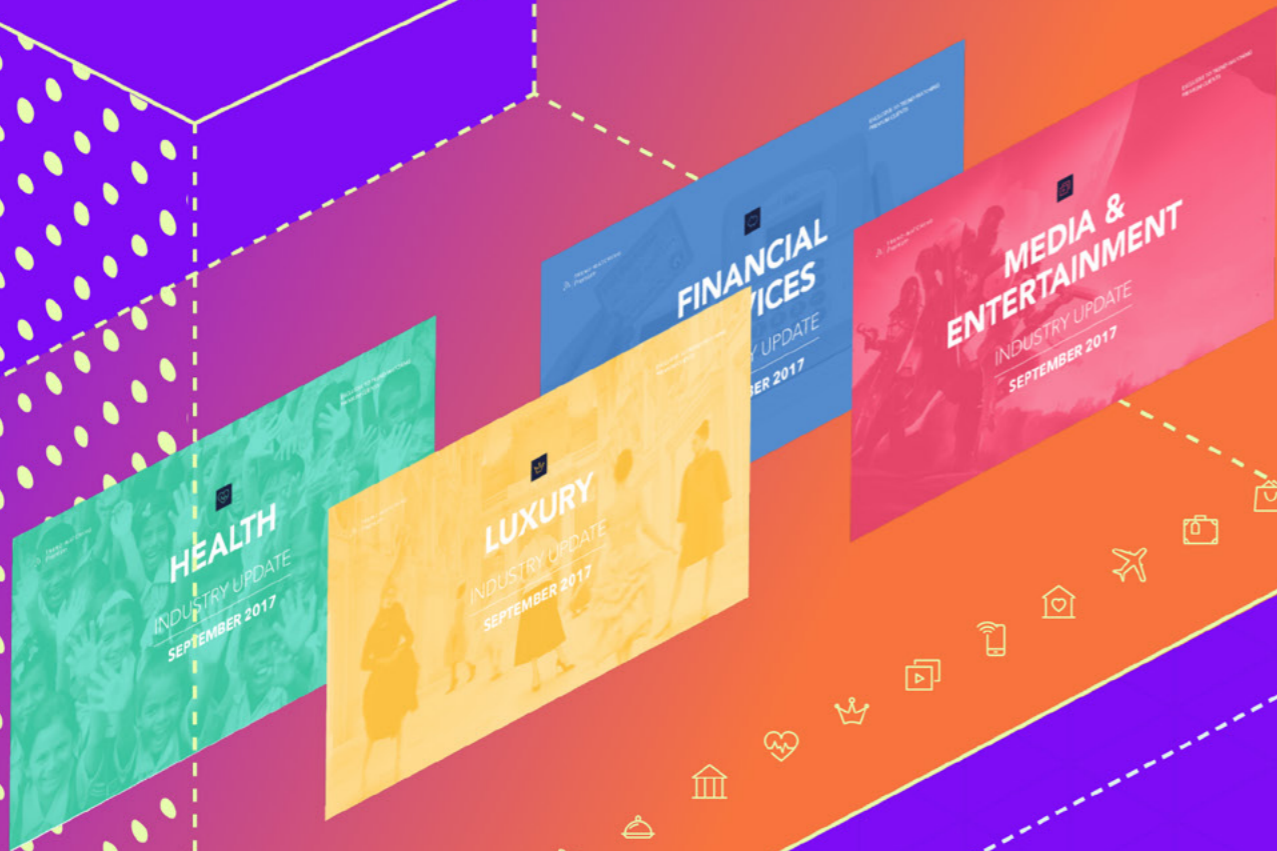
Why? First, here's global consulting firm McKinsey with a thunderbolt:

**On a global scale, we calculate that the adaptation of currently demonstrated automation technologies could affect 50 percent of the world economy, or 1.2 billion employees and USD 14.6 trillion in wages.** – McKinsey, May 2017

We're used to the idea that consumers care about how brands treat vulnerable workers in emerging economies (think fair trade coffee). But recent headwinds – insecurity over a coming wave of job automation, rising inequality in many countries, and ruptures in the social fabric caused by globalization – are giving millions around the world new reasons to be concerned for the broader social good.

Those consumers are looking to brands to play their part when it comes minimizing negative impacts and building a better future. And they know that starts with an internal culture that prizes ethics and sustainability.





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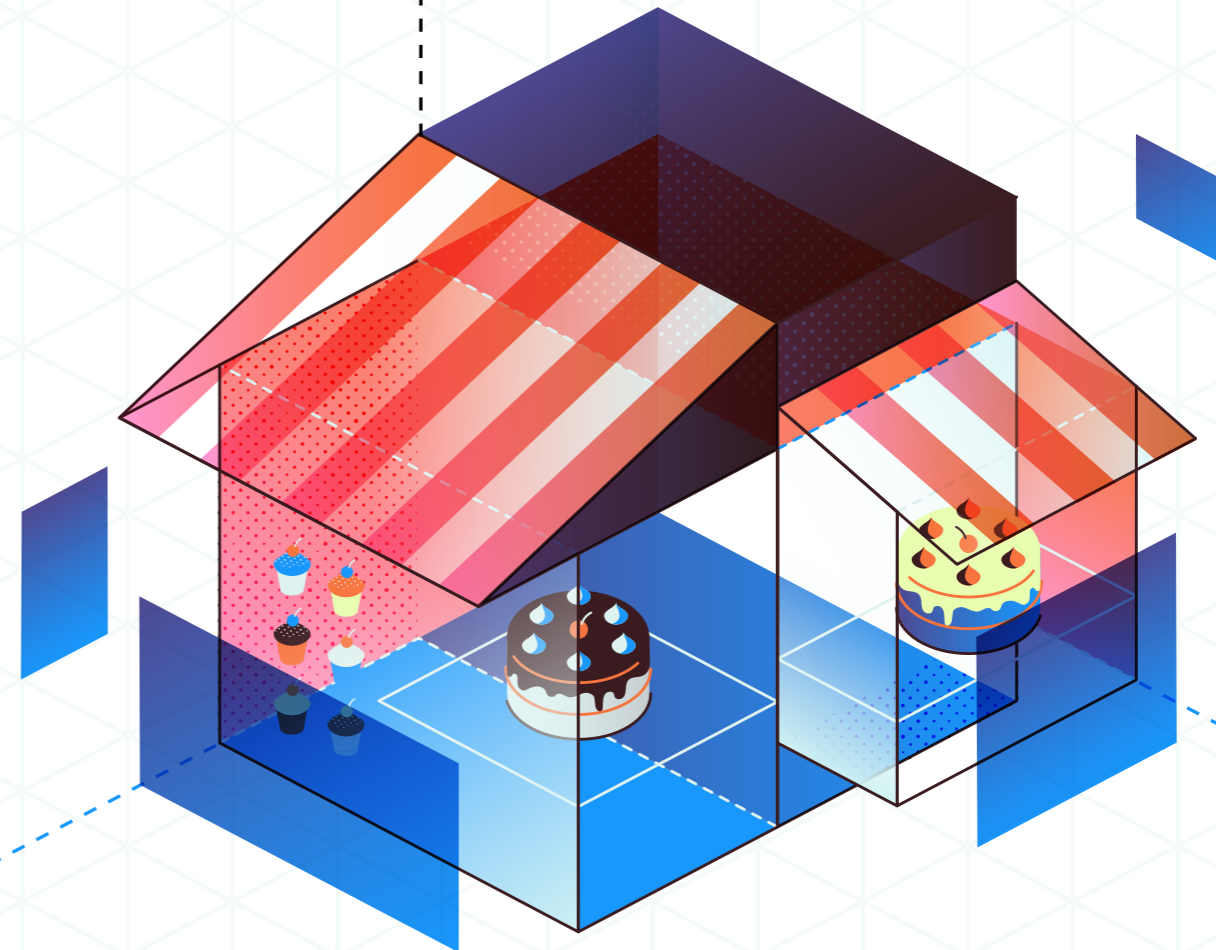
## A WORKING MODEL

Perfect transparency will never exist. And a brand will always be much more than its internal culture. But thinking about the emergence of brands as glass boxes should spur powerful change.

The black box/glass box model of brands is just that - a model. A new way of thinking about what brands are and about how consumers relate to them.

Like any model, glass box brands is not perfect. No brand is absolutely transparent. And of course the complex bunch of associations, feelings and expectations that make up a brand involves much more than only internal culture.

What does this mean in practice? If your service is the cheapest, fastest, most convenient, rarest, most fun or most effective in some other domain, then for now many consumers will continue to engage with you *whatever your internal culture looks like*.





But the forces driving the emergence of glass box brands are powerful, and they're not going away. If you think your internal culture will always remain hidden, let us politely suggest that you're dreaming.

Once you accept that your internal culture is now public facing, then the question becomes simple. **Are you SO good that when consumers see damaging or unpleasant aspects of your internal culture, they'll stick with you?**

Don't want to take that risk? Then it's time to respond. We've got you covered...





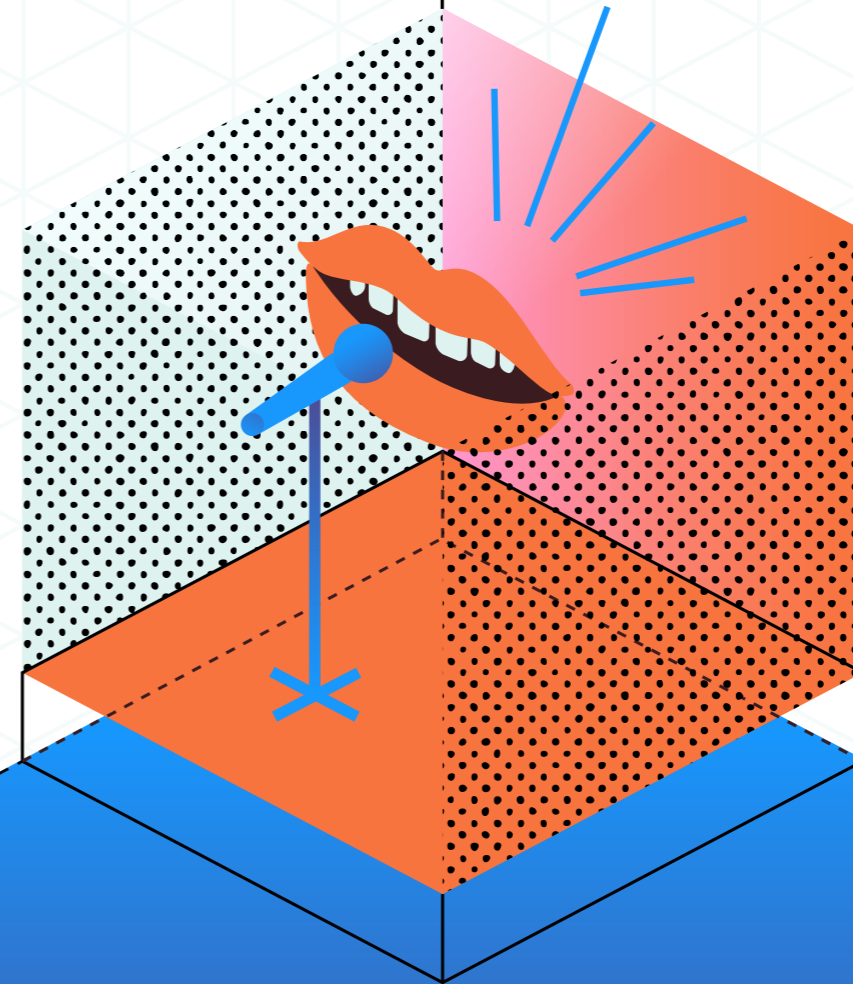
**WHAT  
TO  
DO?**

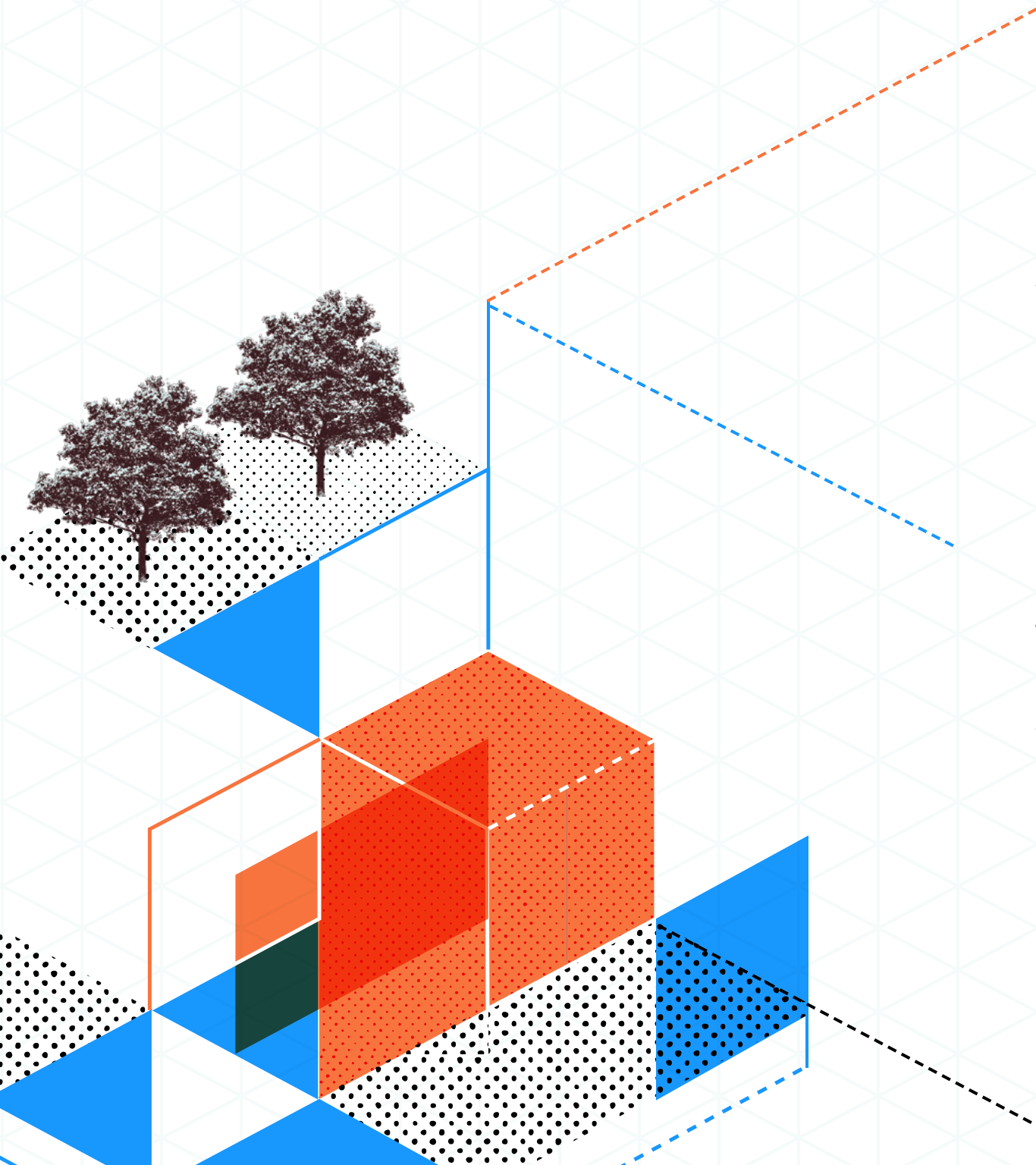
Take meaningful steps to improve your internal culture. And then tell the world compelling stories about that journey!

So radical transparency is turning your brand from a black box to a glass box. What should you do about it?

Let's get two truths straight. First, your culture isn't perfect; no culture is. Second, an organization's culture is never static; it's a changing and evolving thing.


**Once you've absorbed those two truths, the only way to respond to the emergence of glass box brands should be clear. Make positive changes to your internal culture, and tell the world the story of that journey.**



An abstract geometric composition on the left side of the page. It features a light blue grid background. At the top left, there are two trees on a hill with a black and white polka-dot pattern. Below this, there are several overlapping geometric shapes: a blue triangle, a red cube with a white polka-dot pattern, and a blue triangle with a white polka-dot pattern. A dashed orange line starts from the top left and extends towards the top right. A dashed blue line starts from the top left and extends towards the middle right. A dashed black line starts from the bottom left and extends towards the bottom right.

Why is that a powerful – and the only meaningful – move? Because consumers don't expect you to be perfect: they understand no perfect culture exists. But they do expect to see you moving in the right direction.

That is an empowering truth for any business leader. Because wherever your internal culture is now, you can start taking steps to make it better, and start telling people about that.

A decorative graphic at the bottom right corner consisting of a large blue triangle and a large orange triangle with a white polka-dot pattern, both pointing towards the top right.

That's why in 2017 your internal culture – or more specifically *the story of how you are evolving your internal culture* – can be your most powerful external marketing asset. **If you make positive cultural changes, and communicate that effectively, that story can become a massively powerful part of your brand.** One that drives millions of consumers to feel great about your business and actively want to engage with you.

Of course, organizational change is hard. And telling compelling stories is hard, too. That's why we've featured some must-see examples of brands and business already doing this.



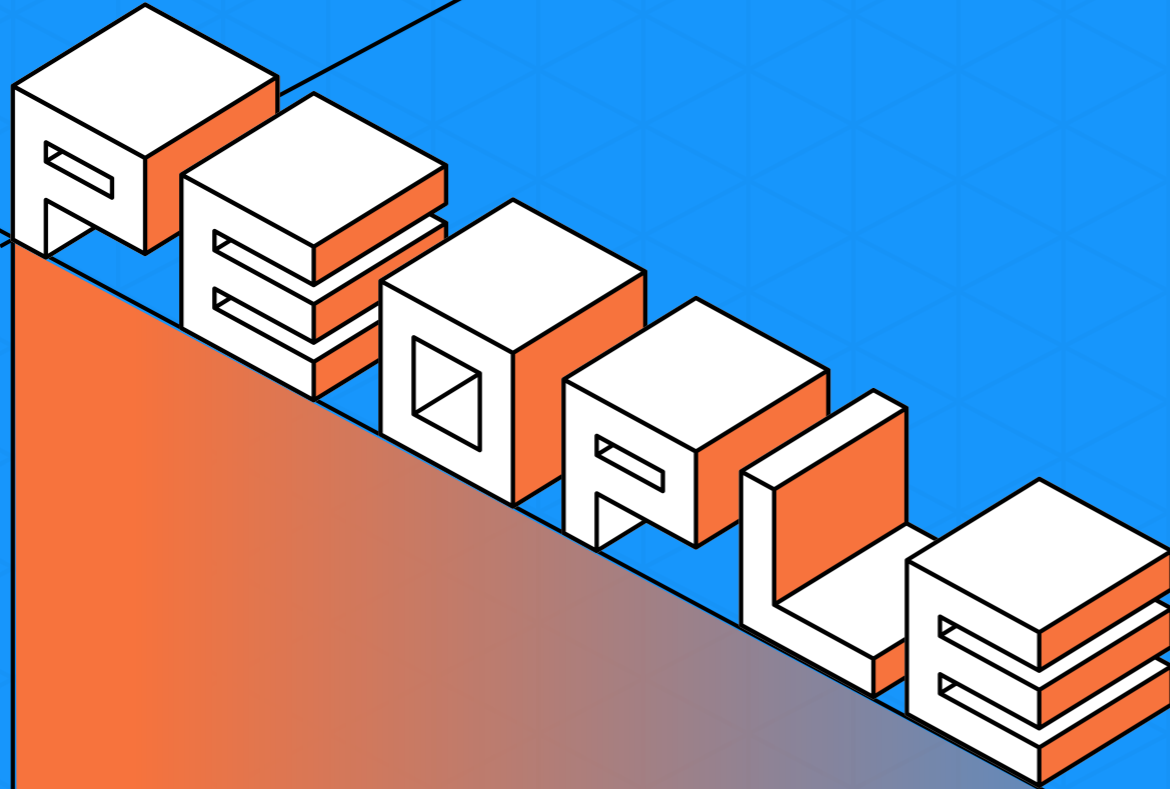
*Read on, and  
get fired up!*



## ABOUT THE AUTHOR

David Mattin is Global Head of Trends and Insights at TrendWatching. A sought-after keynote speaker and widely published writer, he speaks regularly at high-profile conferences around the world, including The Next Web 2016, the 15 Seconds Festival and NEXT Conference.





Your internal culture is made real - and lived every day - by your people. No surprise, then, that when it comes to making a positive change to that internal culture, your people are a great place to start.

There's an almost infinite number of ways you can bring positive change here. The message you'll deliver internally will be loud and clear. But in a world of glass box brands, that positive message will spread to your customers, too. And change the way they feel about you.

Ready to get started? Take inspiration from these examples...



## Furniture retailer doubles statutory parental leave

One way to bring meaningful positive change to your own people? Think a healthy, balanced working environment. IKEA India targeted the issue of parental leave.

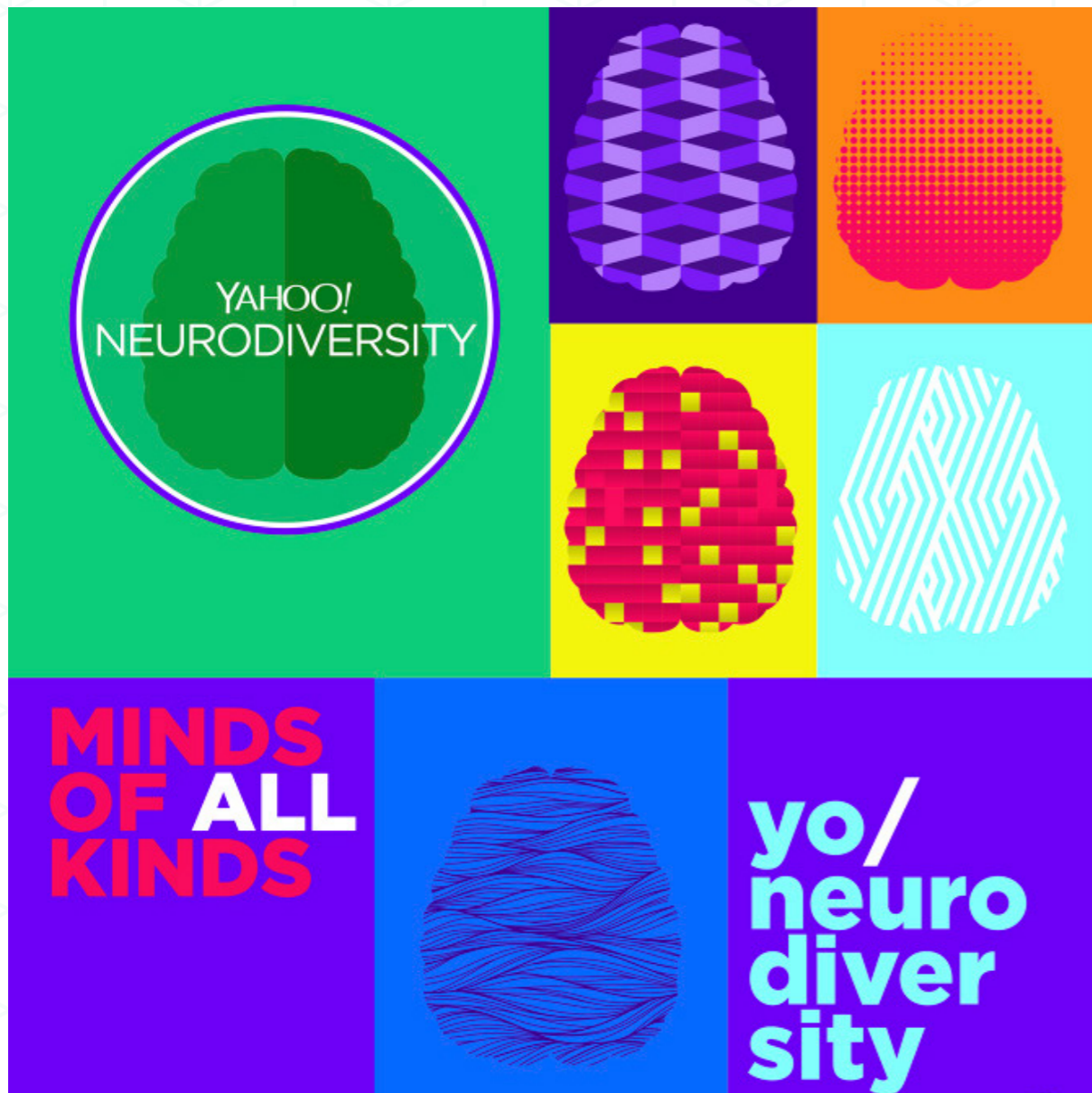
In March 2017, [IKEA India](#) announced an updated parental leave policy under which all employees who become new parents are eligible for six months' paid leave. In addition, mothers can shorten work hours by 50% for a further 16 weeks. The Swedish retailer is also planning to offer daycare centers and training to help employees continue their career while raising a family.

### TREND FRAMEWORK »



### INDUSTRIES »





## Company draws on strengths of neurodiverse employees

Do something to draw on the unique strengths of staff members who can often be disadvantaged or overlooked. The positive message you send to all your people - and to your customers - will be loud and clear.

In May 2017, Yahoo! introduced an initiative to utilize the strengths of employees diagnosed with neurological differences such as Autism, ADHD, Dyslexia and OCD. The [Neurodiversity Employee Resource Group](#) focuses on the learning the needs of employees, creating a community of support, provision of resources, and increasing the ability of managers to utilize diverse teams effectively.

### TREND FRAMEWORK »



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**COACHING  
&  
SUPPORT**

**AND GIVING THEM**

 VODAFONE

Telco's program facilitates career breaks



## FIRST BANK OF NIGERIA

### Bank unveils employee promotions despite economic crisis

Your organization exists within a broader local context. How can you respond? Bank of Nigeria proved its dedication to employee training and development at a time of rampant unemployment.

August 2017 saw **First Bank of Nigeria** promote more than 3,000 staff members in recognition of their work. The move came amid a recession in Nigeria that has seen unemployment climb for nine consecutive quarters. Promoted staff were mainly lower and middle management, who were chosen for their dedication to customer service delivery. The bank has also unveiled new programs to build leadership and management expertise among staff.

chosen for their dedicated to customer service delivery'

#### TREND FRAMEWORK »



#### INDUSTRIES »

 FINANCIAL SERVICES



 TRUWORTH WELLNESS

## Internal program rewards employees for healthy behavior

One way to make a meaningful and people-focused internal change? Find innovative ways to reward employees for healthy, constructive behaviors. Truworth Wellness focused on health - but there are all kinds of behaviors you can incentivize!

In February 2017, Indian workplace health provider [Truworth Wellness](#) announced an app that rewards employees when they follow their health plans. Participants receive points that be exchanged for health products when they stick to their agreed health programs. Wellness Corner also has an algorithm to help individuals manage their sleep, relationships and emotional health.

### TREND FRAMEWORK »



### INDUSTRIES »

 HEALTH



 TIME HOTELS MANAGEMENT

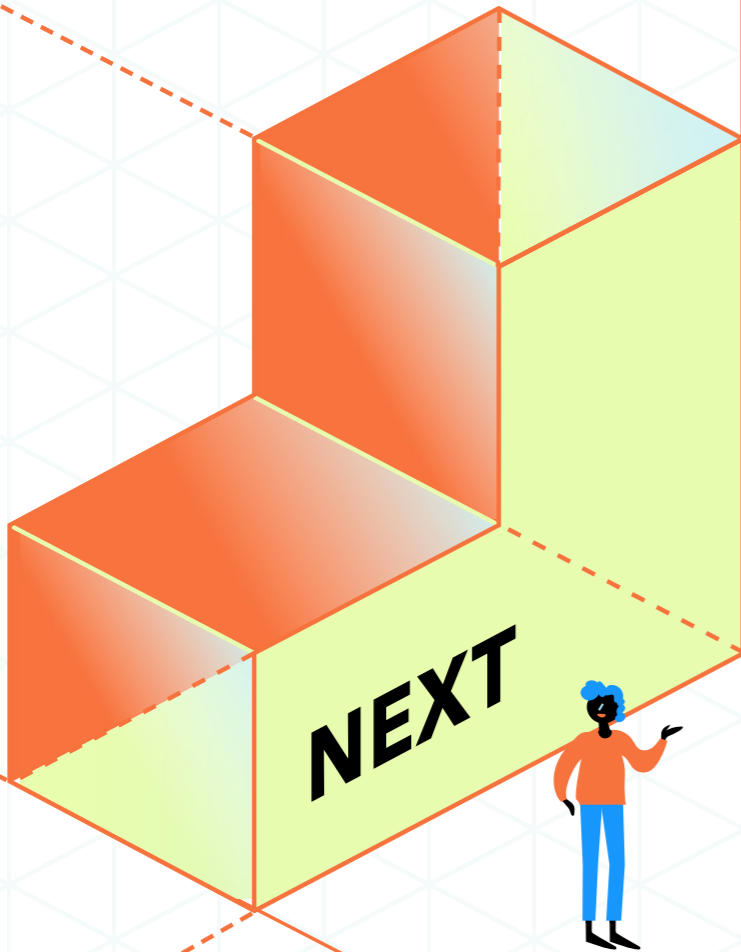
New hotel in Dubai will be led by and empower female staff

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The key here? See this process through the eyes of the employees you are trying to serve, and protect the mission to genuinely make life better for those people.

Yes, that might mean fighting off colleagues who see this as a chance to make internal changes that are focused only on getting employees to be more efficient or productive ;)

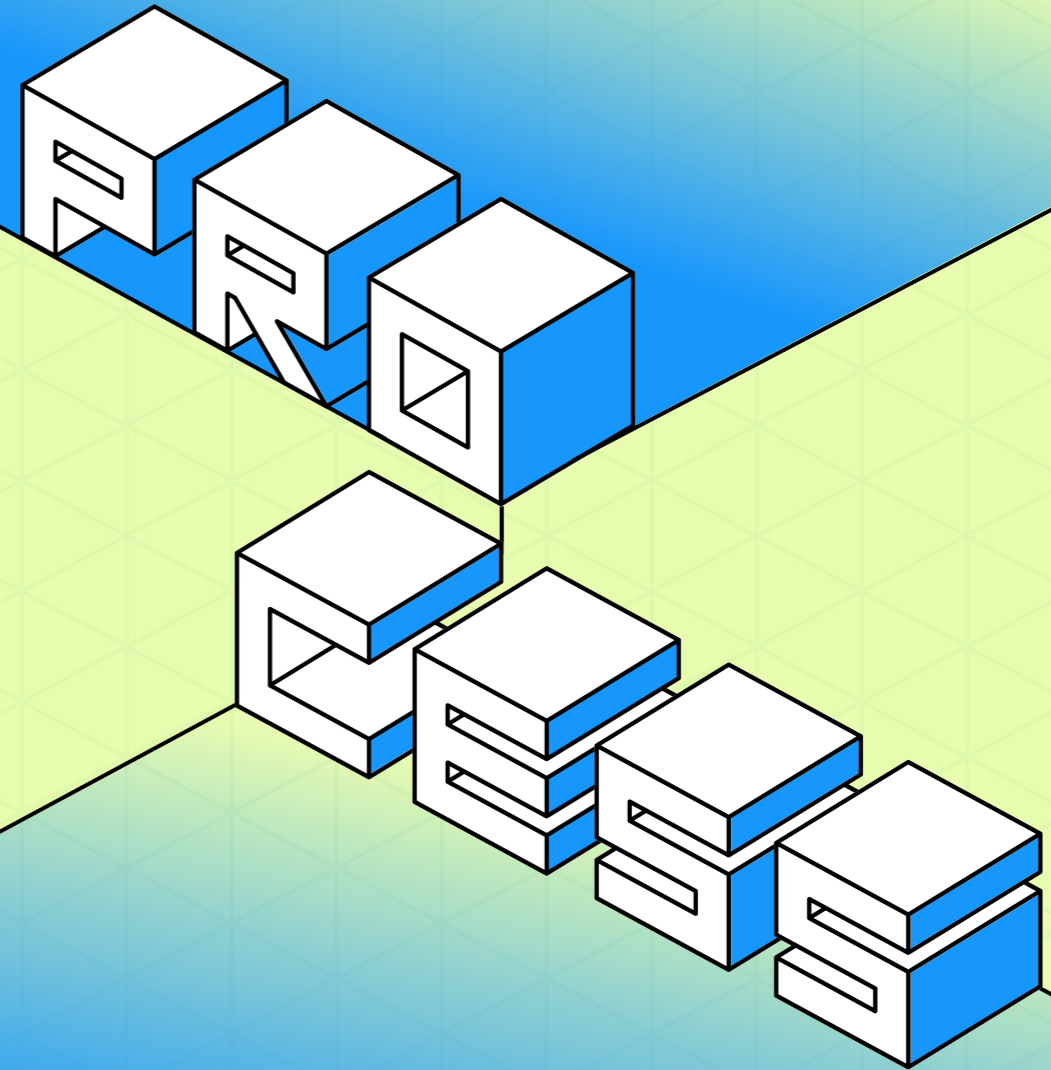
And remember: think broadly about your people and how you can serve them. Initiatives for professional development can be extremely powerful. But so too can programs that help your people develop in dimensions that have no direct link to their work.

And once you've made the change? Encourage your people to tell you - and the world - how they feel about it.

Your people are the living embodiment of your internal culture. But they're far from its only incarnation. Another lens to look through when it comes to making positive change? The unique set of processes, systems, traditions and plain old habits that help make your internal culture what it is.

Changing those processes to make them more sustainable, more ethical, safer, healthier or just easier and less stressful isn't only the right thing to do. In a world of glass box brands, it can send a powerful message to consumers about who you are.

Check out how these brands are *already* getting to work!





 CARREFOUR

## New uniform helps protect staff from colds and flu

One simple angle here? Introduce a straightforward change that helps keep staff safer or healthier while they work. Good for the business, good for your people, good for your brand. A win-win-win!

In May 2017, [Carrefour Poland](#) launched Uniform that Cares: shirts that are designed to protect employees against airborne viruses and bacteria. The shirt is made from a smart fabric called CottonX that works by attaching copper compounds to cotton fibers via ultrasound waves. Copper targets germs that settle on the surface of the fabric.

### TREND FRAMEWORK »



### INDUSTRIES »

 TRAVEL

# Thrive Global

Changing The Way We Work And Live



## THRIVE GLOBAL

Simple tool deals with the problem of vacation email backlog

Sometimes, all it takes is one straightforward shift to an established tool, method or way of working. Thrive Global founder Arianna Huffington targeted email...

In August 2017, Arianna Huffington, founder of wellness company [Thrive Global](#), revealed a simple change to her company's email practices. Huffington said that when a Thrive Global employee who is on vacation is emailed, an automatic response is sent back. Then an email management tool deletes the email. This prevents a long queue of emails building up for the employee to deal on return from vacation, which, says Huffington, 'can be a source stress of which mitigates the benefits of disconnecting in the first place'.

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● QUARTET COMMUNICATIONS CO.

Agency rewards employees for working less overtime



RENNER

## Brazil's largest fashion brand starts recycling and upcycling textiles

One of the most powerful angles to address when thinking processes? The search for a more sustainable consumerism. How can you make a pro-sustainability change that becomes part of your brand story?

In July 2017, Brazilian fashion retailer [Renner](#) turned its attention to sustainability with the launch of Responsible Fashion. The changes mean customers can now take disused apparel to one of the Brazilian fashion chain's stores, where the garments are either donated to social organizations, or transformed into fibers to be used in creating new material. Items will also be upcycled into new products, with the company providing training for staff carrying out this work.

### TREND FRAMEWORK »



### INDUSTRIES »



 INDIAN WOMEN AND CHILD DEVELOPMENT MINISTRY

## Online portal allows women to report workplace sexual harassment

What new processes can you put in place to ensure a culture that is ethical and free from bullying and harassment?

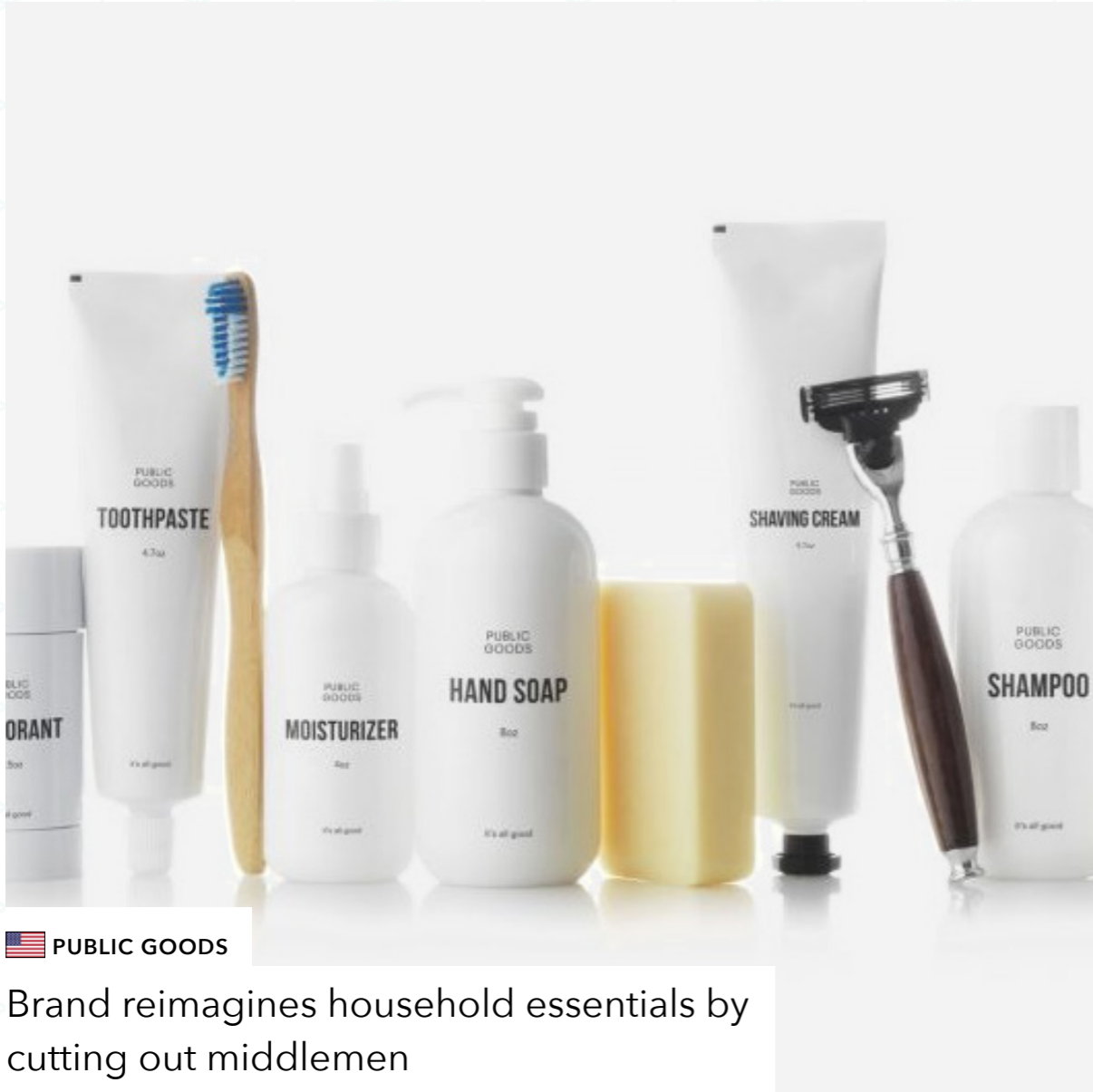
July 2017 saw [India's Women and Child Development Ministry](#) launch the SHE-box: an online portal for women to report sexual harassment. Once a complaint is submitted, it's sent to the relevant internal complaints committee. Initially available for women working in various government offices, the ministry plans to make the service available to the private sector by the end of 2017. SHE-box was developed after sexual harassment concerns were raised by female employees.

### TREND FRAMEWORK »




### INDUSTRIES »

 GOVERNMENT



 PUBLIC GOODS

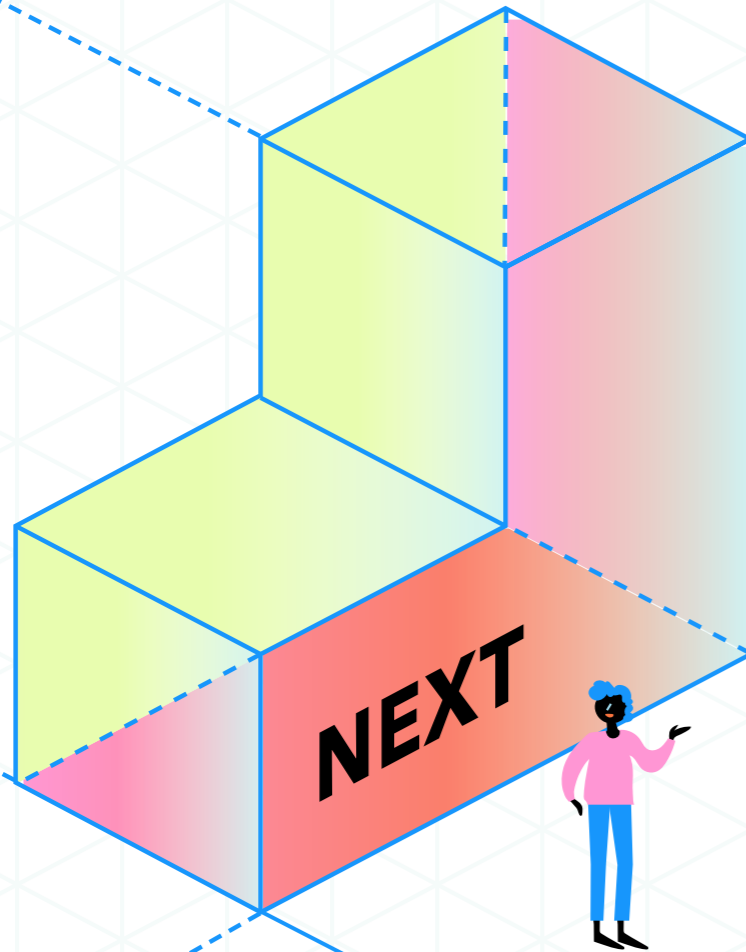
Brand reimagines household essentials by cutting out middlemen

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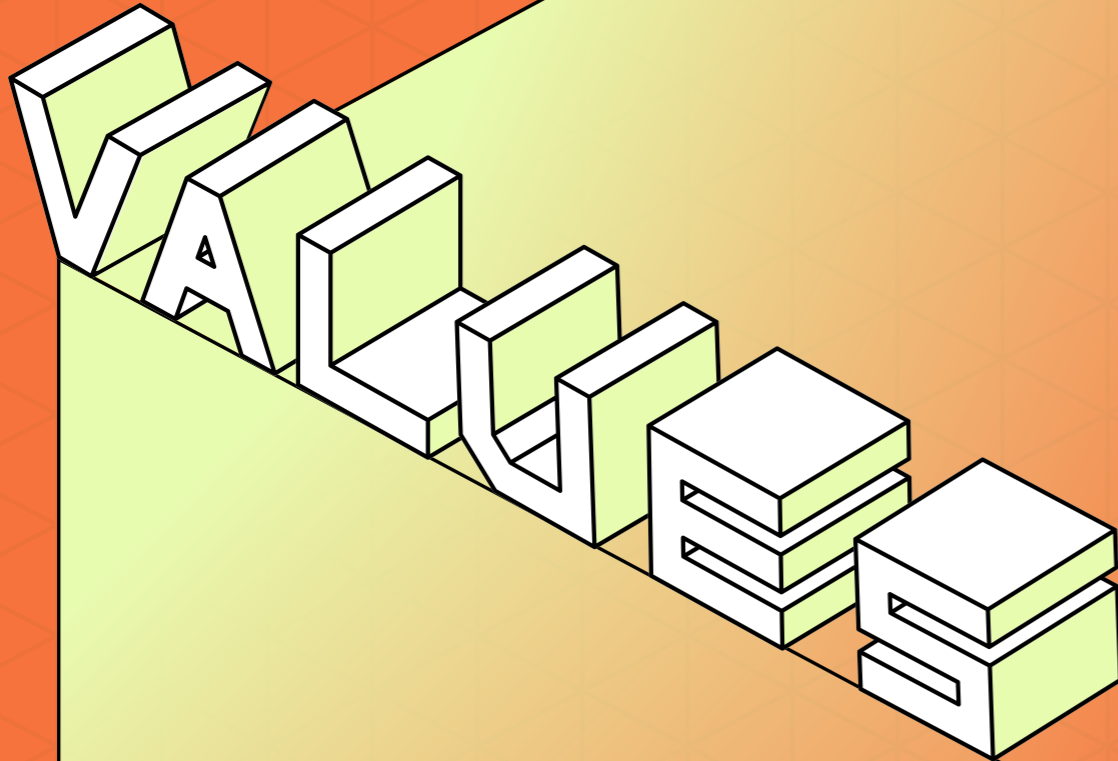
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The changes you make to your internal processes might not look anything like the changes you've seen here.

But these examples should prompt you to ask: how can we make a meaningful and positive change to the way we work, the systems we use, the policies our people follow? And how can we tell a compelling story about that change - for our own people, and for those outside our four walls?

If Uber can fire Travis, you can make something happen! Joking, joking ;)



The central idea driving glass box brands is simple: when consumers see your internal culture (and in 2017, they *will* see it), it changes their view of you as a *brand*.

Yes consumers will care about how you treat your people. Yes they'll care about your processes. But that's because they'll be using that information to try to discern something even more fundamental: your values. What you believe in. What you stand for.

Want to make an ultra-powerful statement via a change to your internal culture? Take action that makes a loud, resounding statement about who you are and the values you hold.

First, take look at how these brands did just that.



## Initiative pays IBM staff to donate time to key health challenges

Your people are a repository of knowledge, skills and expertise. Want to prove where your values lie? Set them free to do some good!

The [IBM Health Corps](#) is an initiative that allows IBM employees to take paid time off to work pro bono on key global health challenges. The initiative has brought IBM expertise and computing resources to problems such as access to chemotherapy in sub-Saharan Africa, and the Zika virus. In June 2017, IBM Health Corps rolled out ChemoQuant, a platform that helps sub-Saharan African countries forecast demand for cancer drugs. Anyone at IBM with two years of service can apply to join the Health Corps, and similar programs run around non-profits and smart cities.

### TREND FRAMEWORK »



### INDUSTRIES »

 CONSUMER ELECTRONICS

 HEALTH



 HSBC TAIWAN

## CEO walks gay employee down the aisle

Making an internal move that speaks volumes about your values doesn't have to mean huge amounts of money, time and logistics. Sometimes, a simple gesture says everything. Especially when it comes from the very top.

In February 2017, [HSBC](#) announced that its Taiwanese CEO had walked a gay employee down the aisle at her wedding. The woman has been with her partner for 11 years, but her father disapproved of her relationship. The wedding of the LGBTQ couple was attended by many HSBC co-workers, and HSBC published a video of the couple's experience on its official YouTube channel.

### TREND FRAMEWORK »



### INDUSTRIES »

 FINANCIAL SERVICES



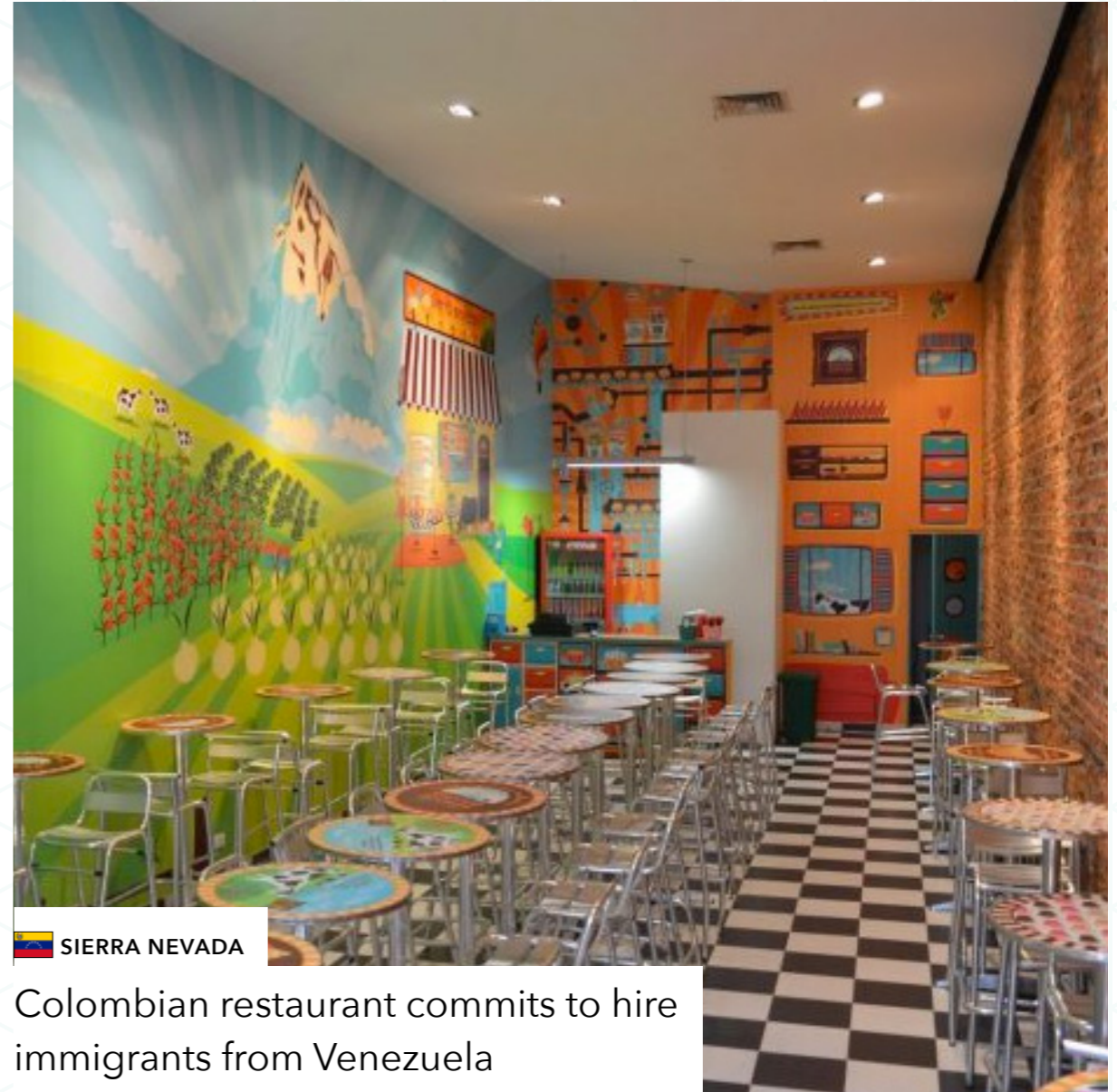


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 SIERRA NEVADA

Colombian restaurant commits to hire  
immigrants from Venezuela



 **FACEBOOK**

## Tech giant builds village in response to Silicon Valley housing crisis

You don't *have* to spend a fortune to prove who you are and what you believe. But if you happen to have one, then by all means go ahead ;)

Facebook submitted plans in July 2017 to construct [Willow Campus](#): a neighborhood with 1,500 homes and services in Menlo Park, in response to rising Silicon Valley rents and a lack of investment in infrastructure. The campus will sit across from Facebook headquarters and include transit, offices, store and apartments, 15% of which will be priced below market rates. Facebook employees and non-employees will be eligible to reside in the village, which the company expects to finish by 2021.

### TREND FRAMEWORK »



### INDUSTRIES »

 **MEDIA & ENTERTAINMENT**



 KOCHI METRO RAIL

## Indian rail company hires from local transgender community

How bold can you be when it comes to making a statement via your internal culture? Well, how about *this* bold?

In May 2017 in the south Indian city of Kochi, the [Metro Rail](#) hired 23 members of the local hijra community, an ethnic transgender community local to the city. A spokesman for Kochi Metro Rail explained that the move was intended to help fight prejudice against trans people, and integrate them into Indian society, saying 'we want the metro to be not just a means of transport, but also a livelihood improvement project.' The new recruits will serve passengers and sell tickets, and have taken classes in customer care and confidence.

### TREND FRAMEWORK »



### INDUSTRIES »

 TRANSPORT



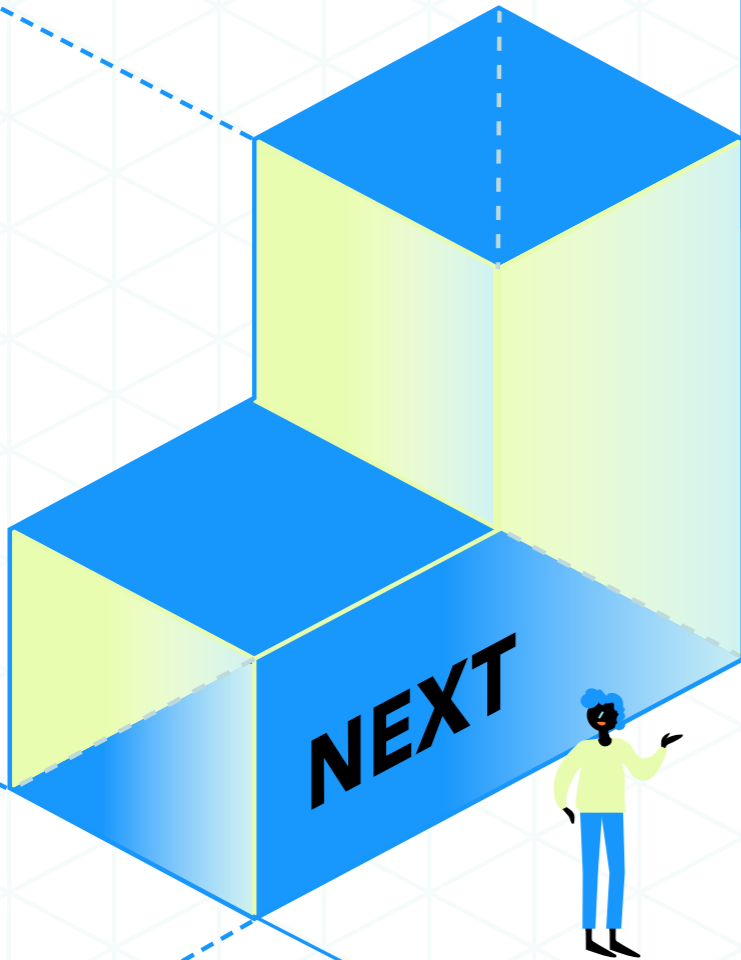
UK cosmetics retailer protects employees after Brexit vote

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Ready to make an internal change that speaks volumes about your values?

It could be a fundamental, organization-wide shift, such as IBM's decision to let employees donate time to global causes. Or it could be a single, simple gesture, such as the HSBC CEO walking a gay employee down the aisle.

It could target a local issue, such as Lush and their move to protect workers after Brexit. Or it could be about a fundamental principle of dignity and fairness, such as the Kochi Metro Rail and their decision to employ transgender people.

In all cases, remember that the **VALUES** your move communicates need to be authentic and sincere, or there will be blowback!



Time to apply  
this trend  
inside *your*  
organization!



*Time to start  
a movement.*

So you're convinced we live in a world of GLASS BOX BRANDS. You're inspired by the examples. You're ready to apply this trend inside your organization!

We know what you're thinking ;) What if you're not in a place inside your organization where you can drive a meaningful change to the internal culture?

**You can still take action on this trend.  
By starting a movement inside your brand! The aim here is to get buy-in from colleagues that will lead to action.**

Start talking to those around you about the arrival of the glass box. Start a Slack channel. Share this Briefing. Make a tiny change in the way you work and share that story!

The dream scenario: bring your HR and marketing people together to analyze, debate and strategize over the idea that internal culture is becoming a key part of brand.

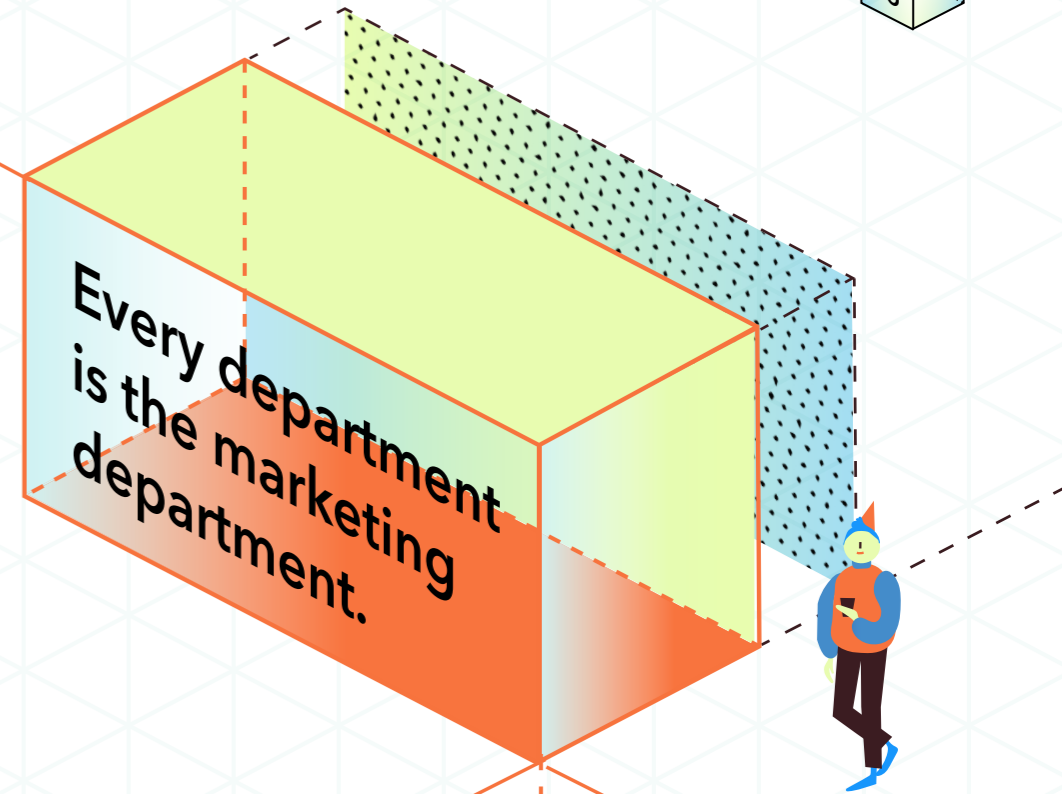
Ready to get to work?

Note that there are two tasks here. First, make a meaningful and positive change to your internal culture - or identify one that you're already making. Second, tell a compelling story about that change.

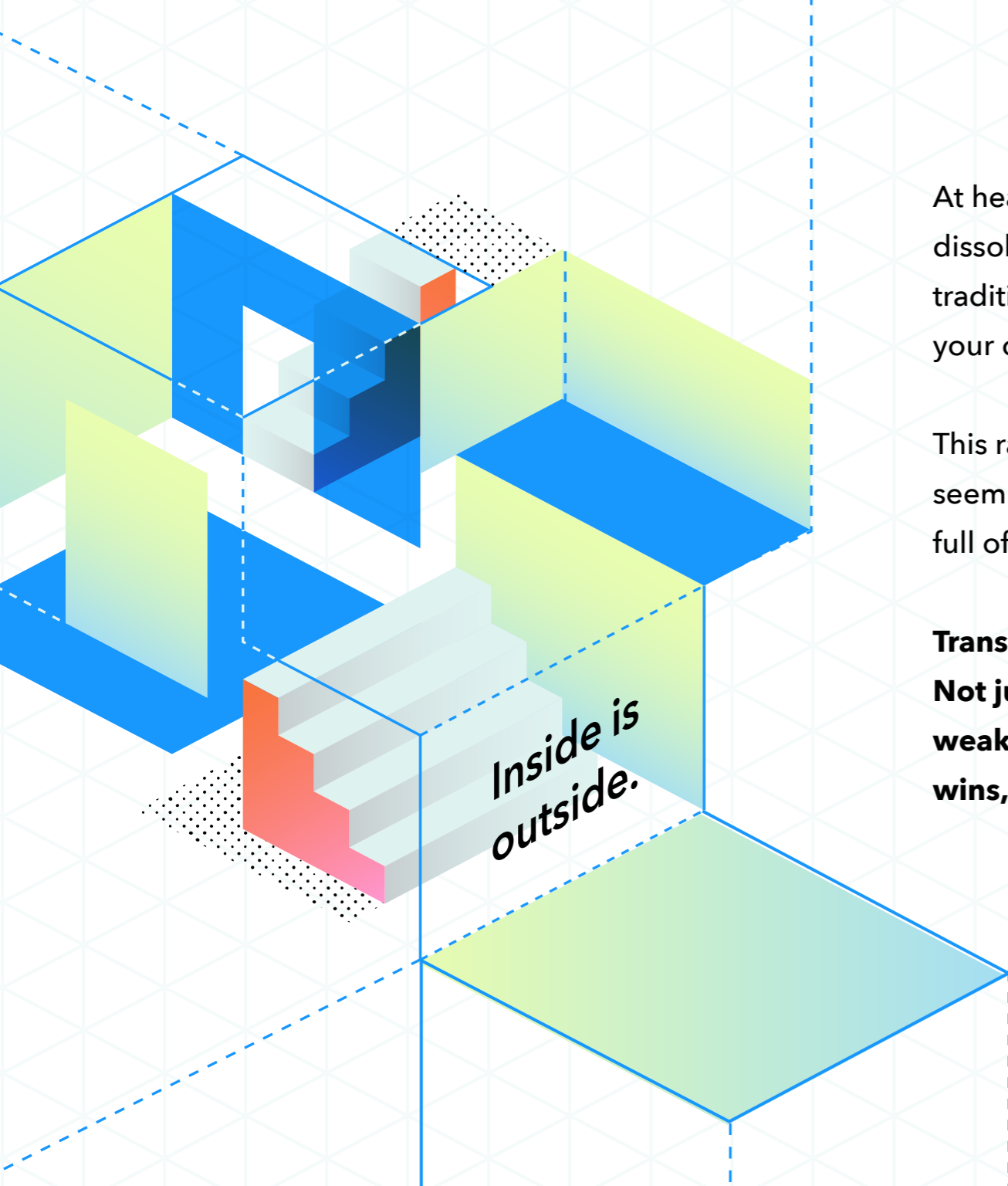
We all know that organizational change is hard. Don't forget that telling compelling stories is hard, too. It will be brands that can push out stories of cultural change that people actively want to consume that will win.

Traditionally, that kind of public-facing communication would be seen as the job of marketing. It's time to forget that thinking. **In a world of glass box brands, every team needs to be empowered to effectively tell the world their stories of positive change.**

That means your marketing function needs to be diffused all the way through your organization. Every department is the marketing department.







At heart, this trend is about the dissolution of the barriers that traditionally separated the inside of your organization from the outside.

This radically transparent world can seem a scary one. But it's also one full of opportunity.

**Transparency is an amplifier.  
Not just of your mistakes or  
weaknesses. But of your epic  
wins, strengths and virtues, too.**

*Inside is  
outside.*

Be catalyzed by the knowledge that the changes you make inside your organization can now impact on the wider world in all kinds of new ways. Embrace this opportunity. Run with it. Have fun with it!

And remember: the world is watching ;)

# PLANNING YOUR STRATEGY FOR 2018?

Sign up to our Premium service be one of the first to get your hands on our brand new Trend Report.

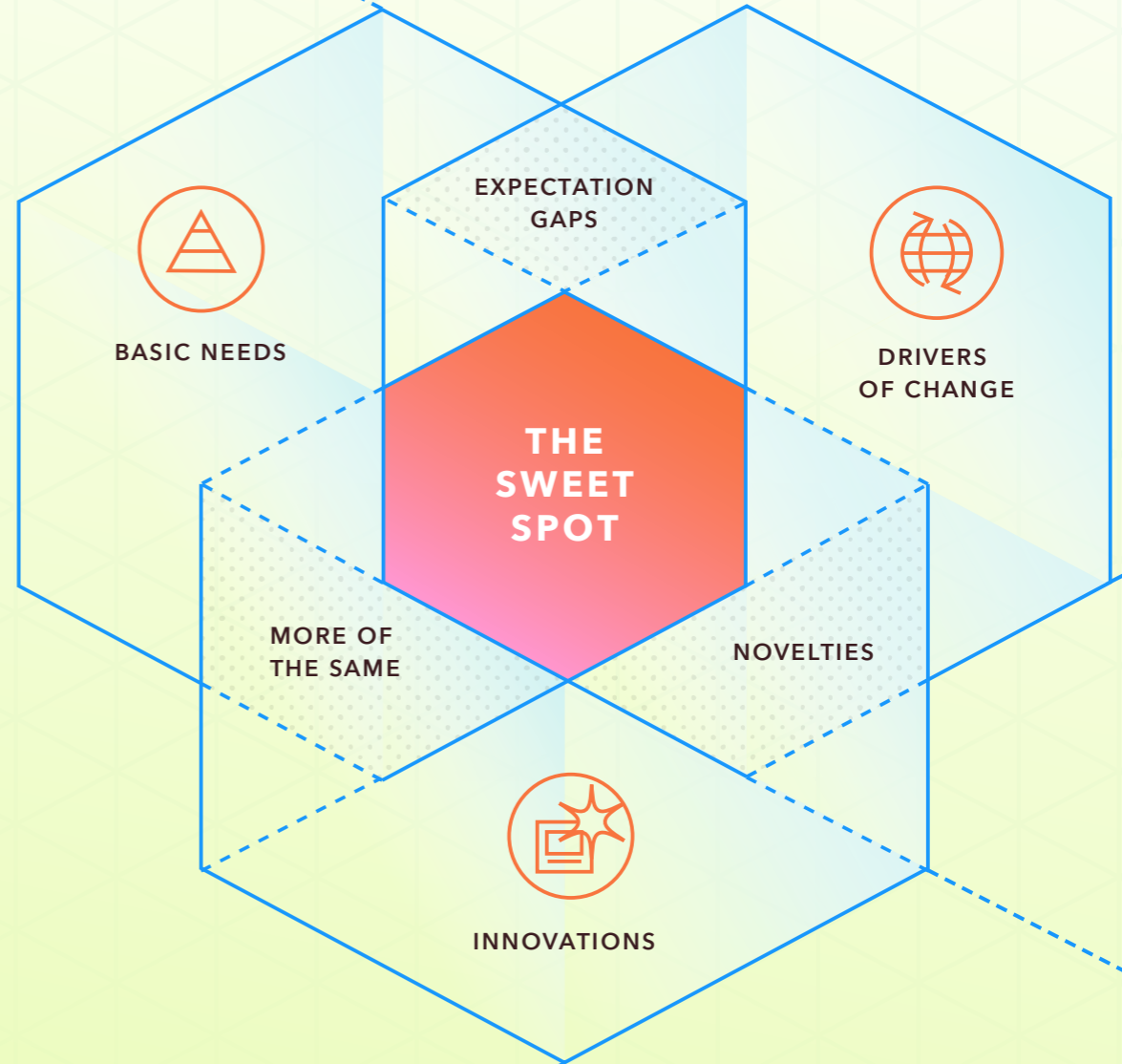
Unlock a wealth  
of opportunity »

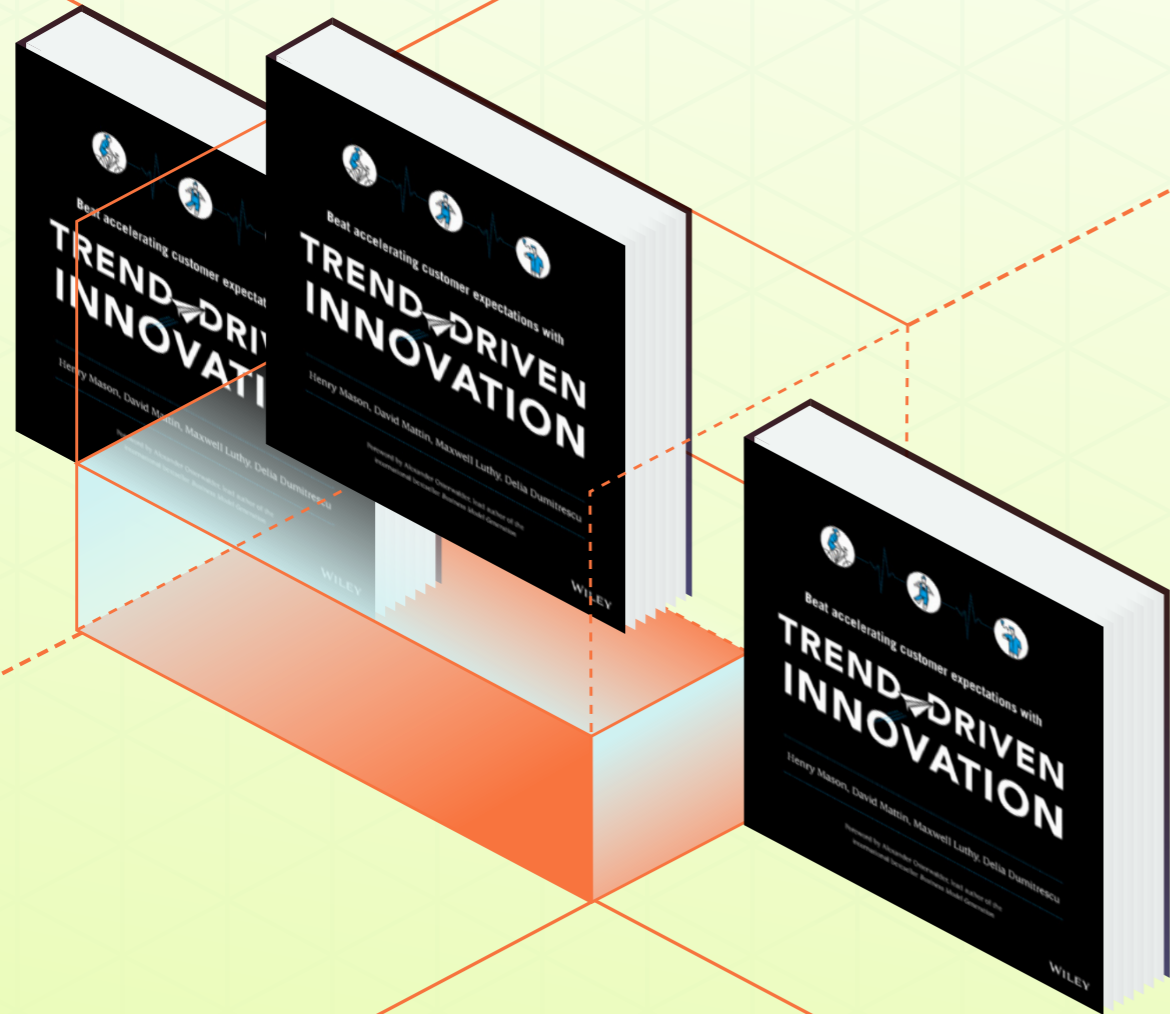


# Trend-Driven Innovation

Spotting trends?  
It all starts with  
innovations...

Trends provide powerful answers to the huge question you're wrestling with: 'what will my customers want next?' Let us share the not-so-secret secret to spotting trends (including the ones in this report!): **stop watching customers, and start watching the innovations - products, services, campaigns - flooding into the market now.** Draw lines between similar innovations, and interrogate them for the new customer expectations they're helping to create.





Why does watching innovations lead to foresight into what customers will want next?

The answer lies in the expectations those innovations are creating. When an innovation serves fundamental human needs in a novel way, it sets new customer expectations. And once created by a game-changing innovation, these customer expectations will spread across markets, industries, product and service categories, and demographics.

If you want to learn more about how we spot and track trends then our book, **Trend-Driven Innovation** contains our end-to-end methodology that we use with clients.

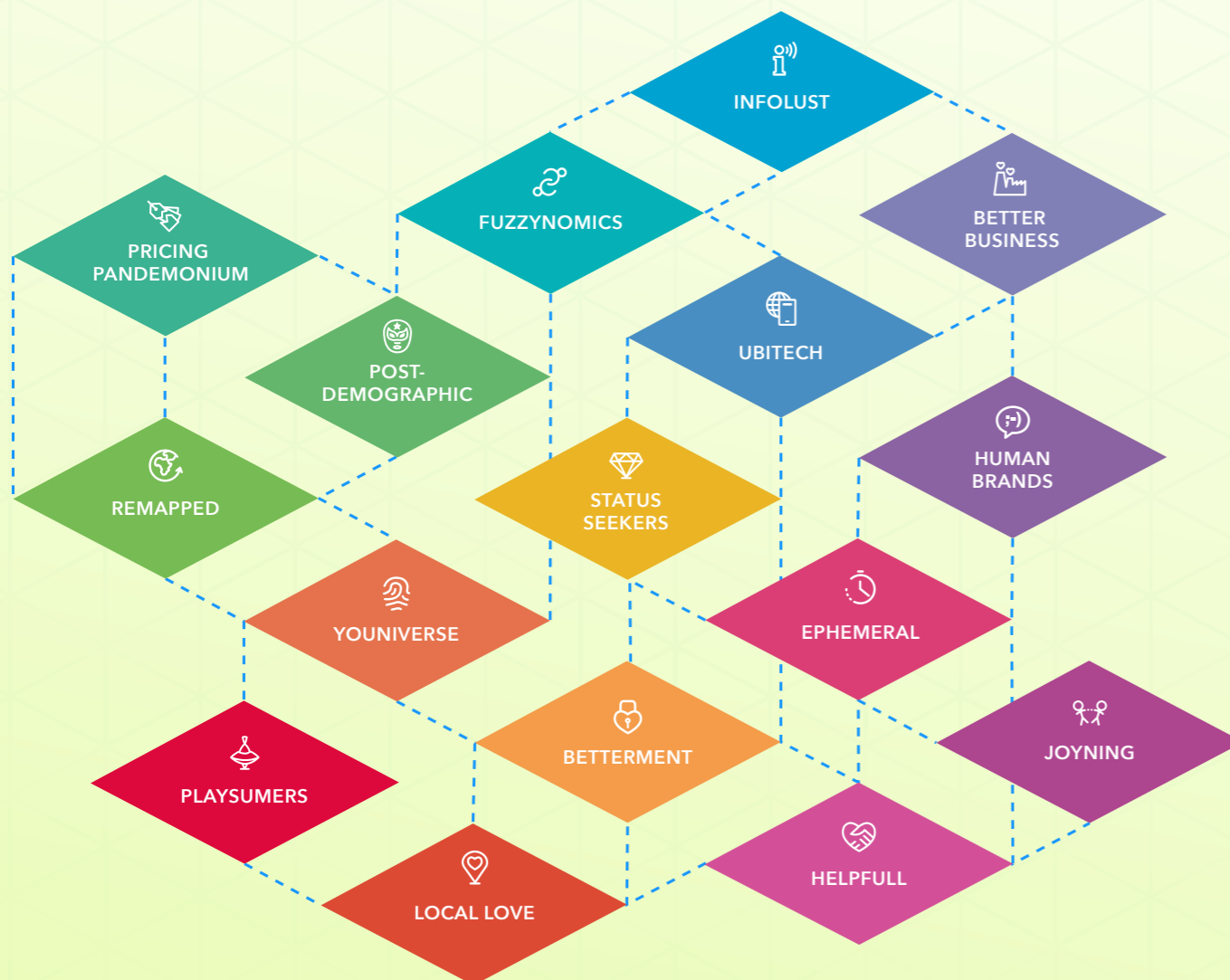
## The Trend Framework

16 mega-trends that provide structure and context when tracking innovation.

So how do we process the thousands of innovations we spot?

We map all the expectation-changing innovations we discover against our Trend Framework. These 16 mega-trends (which range from basic human needs and wants to long-term environmental, technological and social shifts) form a comprehensive picture of consumerism.





So there you have it. We don't possess some special gift that enables us to divine the future (unfortunately!). Instead, we simply connect new innovations to points of stability - our mega-trends - in order to see where consumerism is headed, and where future business opportunities will present themselves.

TrendWatching Premium users can dive deeper into how the Glass Box Brands trend will evolve, and how transparency will continue to reshape the consumer arena, by tracking new innovations that fall under three mega-trends:

**BETTER BUSINESS:** the quest for a more ethical, sustainable consumerism (see especially the trend **INSIDER TRADING**).

**HUMAN BRANDS:** the search for more authentic brands.

**INFOLUST:** the need for relevant and actionable information.

Check out all our Premium clients have access to [here](#).



**GET**

**GOING!**