

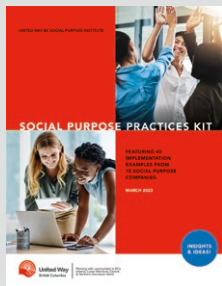
## SOCIAL PURPOSE PRACTICE

# Customer Lifecycle

Integrate your social purpose in the customer experience



INSIGHTS  
& IDEAS!



### SOCIAL PURPOSE PRACTICES KIT

This Purpose Practice is one of 11 Practices in the Social Purpose Practices Kit featuring 40 implementation examples from 15 social purpose companies. The Social Purpose Practices shown below are based on the [United Way BC Social Purpose Implementers program](#) and the experience of the companies who went through it.

Check out the complete [Social Purpose Practice Kit](#) to gain insights and ideas on how to meaningfully, authentically, and impactfully realize your social purpose ambition!

PLAN	EMBED	ENGAGE
<ul style="list-style-type: none"><li>➔ Roadmap</li><li>➔ CSR/ESG Transition</li><li>➔ Product Transition</li><li>➔ Process Metrics</li><li>➔ Impact Goals</li></ul>	<ul style="list-style-type: none"><li>➔ Values</li><li>➔ Decision Lens</li><li>➔ Employee Lifecycle</li></ul>	<ul style="list-style-type: none"><li>➔ External Communications</li><li>➔ Customer Lifecycle</li><li>➔ Stakeholder Transformation</li></ul>



**United Way**  
British Columbia

Working with communities in BC's  
Interior, Lower Mainland, Central  
& Northern Vancouver Island

UNITED WAY BC SOCIAL PURPOSE INSTITUTE



## SOCIAL PURPOSE PRACTICE

# Customer Lifecycle

## Integrate your social purpose in the customer experience

Social purpose companies engage and mobilize their customers on their social purpose. They develop a social purpose customer lifecycle plan that embeds their social purpose across all their customer touchpoints.

### WHY ADOPT THIS PRACTICE?

This practice is necessary to demonstrate the company's social purpose commitment and build trust in the company, to attract, keep and delight customers, to support customers to become brand advocates and engage them for help achieving the company's social purpose, to build a movement around their brand and social purpose, and to drive retention and loyalty and create a bigger and closer customer community that drives a greater societal impact.

### WHEN TO ADOPT THIS PRACTICE?

This practice should be adopted about the same time you are developing your [external social purpose communications strategy](#), about half-way through your social purpose integration journey.

### INSTRUCTION

Hold a meeting with your marketing and communications team to develop a customer social purpose lifecycle plan. Review the examples below for inspiration and ideas for your own approach.

### FEATURED PRACTICES FROM

#### BC Lottery Corporation

We exist to generate win-wins for the greater good. [Corporate.bclc.com](http://Corporate.bclc.com)



#### Coast Capital

We exist to build better futures together by unlocking financial opportunities that positively impact people and communities. [Coastcapitalsavings.com](http://Coastcapitalsavings.com)



#### Deep Cove Kayak

We exist to inspire deeper connections to the outdoors and one another. [Deepcovekayak.com](http://Deepcovekayak.com)



#### Return-It

We exist to foster a world where nothing is waste. [Return-it.ca](http://Return-it.ca)





## IMPLEMENTATION EXAMPLES

### BC Lottery Corporation Customer Social Purpose Lifecycle

PRE-PURCHASE	PURCHASE	POST-PURCHASE	MOBILIZATION
<ul style="list-style-type: none"> <li>• Product Innovation (as part of Product Review Strategy) to develop modified or new products that reflect our social purpose</li> <li>• Social Purpose video (speaks to what is social purpose, why social purpose, our journey with Call to Action inviting other businesses to become purpose led)</li> <li>• Cause Related Marketing that supports our social purpose</li> <li>• <i>Will utilize an internal steering group to assess small pilots to develop proof points. Will work with Player Experience (customer) team to analyze player experience and scale to enterprise over 2-3 years.</i></li> <li>• We are utilizing our owned assets (social media, primarily LinkedIn) to provide story telling aligned to our social purpose. We are working within our Brand Architecture strategy to ensure social purpose is a major consideration in our upcoming brand value proposition.</li> </ul>	<ul style="list-style-type: none"> <li>• Social purpose integration into lottery kiosks and PlayNow</li> <li>• Work with facilities to determine how social purpose can be physically represented in both offices</li> <li>• Updates made to corporate website to reflect social purpose information</li> </ul>	<ul style="list-style-type: none"> <li>• Player (customer) survey and research exploring understanding / alignment of BCLC's social purpose</li> <li>• Build social purpose into our feedback loops with stakeholders</li> <li>• Social purpose training, resources, tools, information provide to customer service representatives</li> <li>• Incorporating social purpose questions in stakeholder surveys</li> </ul>	<ul style="list-style-type: none"> <li>• Customer Activations through corporate sponsorships (Canucks, Whitecaps, BC Lions, Music in the Park, etc.)</li> <li>• Sponsorship deliverables include social purpose</li> <li>• Sponsorship storytelling built into various partner agreements e.g., Sustainable Brands</li> </ul>

## IMPLEMENTATION EXAMPLES

### Coast Capital Customer Social Purpose Lifecycle

PRE-PURCHASE	PURCHASE	POST-PURCHASE	MOBILIZATION
<ul style="list-style-type: none"> <li>Aligning our social purpose to our “we’re for real” brand positioning</li> <li>Identifying value propositions that bring our member (customer) journeys to life. As those become finalized, the pre-and post-marketing pieces will be developed</li> <li>Mapping out how our social purpose product solutions can support our member journeys and drive our social purpose</li> <li>Updated company bios to embed social purpose</li> <li>Updated external website to reflect social purpose</li> <li>Added social purpose to Coast Capital’s boiler plate used for press releases, etc.</li> <li>Utilizing our owned-assets: social media, blog, coastcapital.com, to provide proof points aligned to our social purpose</li> <li>Developing key social purpose messages for all external communications</li> </ul>	<ul style="list-style-type: none"> <li>Exploring how our social purpose can be brought to life in our branches and physical environment</li> <li>Updates made (and will continue to be made) to our external webpage</li> <li>Exploring integration into our member (customer) onboarding process</li> </ul>	<ul style="list-style-type: none"> <li>Our financial health assessment (called the Money chat) forms the basis for all member (customer) engagement and is well aligned to our purpose</li> <li>Exploring how social purpose is integrated into member (customer) communications</li> <li>Planning to build social purpose into our feedback loops with members (customers)</li> </ul>	<ul style="list-style-type: none"> <li>Leveraging partnerships to create even greater impact while building our purpose ecosystem</li> <li>Exploring opportunities to engage our members (retail and commercial members) in our social purpose, this may be through engagement opportunities, educational resources, etc.</li> </ul>



## IMPLEMENTATION EXAMPLES

### Deep Cove Kayak Customer Social Purpose Lifecycle

PRE-PURCHASE	PURCHASE	POST-PURCHASE	MOBILIZATION
<ul style="list-style-type: none"> <li>• Include our Social Purpose in all outgoing digital communications (email signatures, social media posts, YouTube videos etc.)</li> <li>• Include and take into account our Social Purpose before creating new displays, print posters, leaflets etc.</li> <li>• Refer to our Social Purpose when speaking to the media, community partners, at our events</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure all employees are trained in Social Purpose and can speak to it when engaging with our customers</li> <li>• Include Social Purpose in all outgoing communications with customers, confirmation emails, business cards, gift cards</li> <li>• Create and maintain a Social Purpose page on our website</li> <li>• Embed our Social Purpose in our product offerings</li> </ul>	<ul style="list-style-type: none"> <li>• Train front-end staff to be knowledgeable and comfortable talking about our community events, offerings and environmental initiatives</li> <li>• Include feedback surveys in our confirmation emails and use metrics from our surveys to propel and measure the reach of our purpose</li> </ul>	<ul style="list-style-type: none"> <li>• Signage and mention of our Social Purpose at our events to make our participants and community feel included in our purpose by participating in our events</li> <li>• When promoting our events, speak to how community and customer participation propels our purpose</li> <li>• Use surveys after our events to gauge community buy-in to our purpose</li> </ul>



## IMPLEMENTATION EXAMPLES

### Return-It Customer Social Purpose Lifecycle

PRE-PURCHASE	PURCHASE	POST-PURCHASE	MOBILIZATION
<p>Actions focused on educating and inviting our customers and consumers to join our social purpose movement and helping us achieve our purpose by:</p> <ul style="list-style-type: none"> <li>• Understanding their role in our Social Purpose</li> <li>• Leveraging our customer tools to educate:                             <ul style="list-style-type: none"> <li>– Updating our website presence to embed our Social Purpose</li> <li>– Customer newsletter, blogs</li> <li>– Point of Return Screens at collection sites</li> <li>– Communicate impact via Customer Dashboard – demonstrating their individual impact through recycling to quantify and reinforce customer behavior</li> </ul> </li> <li>• Embedding our Social Purpose within our marketing strategy, paid media/advertising, sport sponsorships, social media campaign</li> <li>• Designing Social Purpose guidelines in who and what events we support</li> <li>• Corporate owned Express &amp; GO and Express Plus location Social Purpose signage</li> <li>• Add Social Purpose to our Schools program details, outdoor bins signage</li> </ul>	<ul style="list-style-type: none"> <li>• Social purpose ads on depot POS screen</li> <li>• Social purpose uniforms/t-shirts for our community events</li> <li>• Planned event in spring for Great Canadian Shoreline Cleanup</li> </ul>	<ul style="list-style-type: none"> <li>• Customer newsletter includes our Social Purpose</li> <li>• Profiling our Social Purpose in our Annual report</li> </ul>	<ul style="list-style-type: none"> <li>• Develop a Social Purpose Tradeshow and ambassador team backdrop</li> </ul>

### ABOUT THE UNITED WAY BC SOCIAL PURPOSE INSTITUTE

The United Way BC Social Purpose Institute (UW SPI) exists to grow business for good, partnering with companies and collaborating with governments, allied organizations, and others to grow the Social Purpose Business movement. We help businesses define and implement their social purpose to drive both business growth and societal good and champion a purpose-led economy, accelerating the new business ethic to create long-term well-being for all. Together, we build a better world through business.

For more information, visit us at [www.socialpurpose.ca](http://www.socialpurpose.ca)

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### ABOUT THE AUTHOR

Coro Strandberg is Social Purpose Advisor to United Way BC. She helped create the United Way BC Social Purpose Institute. She has over 30 years experience helping businesses become a force for good and is a national thought leader on social purpose business.

[www.corostrandberg.com](http://www.corostrandberg.com)

The United Way BC Social Purpose Institute is honored to operate as guests on the unceded and traditional territories of the Coast Salish Peoples, the x̱məθḵəyəm (Musqueam), Skwxwú7mesh (Squamish) and səilwətaʔ /Selilwitulh (Tsleil-Waututh) Nations.



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