



OPPORTUNITY AND CHALLENGE:  
THE CORPORATE ANNIVERSARY



**THE HISTORY FACTORY**  
A HERITAGE MANAGEMENT AGENCY

## INTRODUCTION

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**CORPORATE ANNIVERSARIES—UNCHARTED TERRITORY FOR MANY—CAN BE CHALLENGING. YET FINDING A WAY THROUGH THE THICKET OF CHOICES OFFERS REAL OPPORTUNITY FOR COMPANIES TO PURSUE BUSINESS STRATEGIES AND SHAPE THE FUTURE OF THEIR ENTERPRISES. THIS WHITE PAPER IS INTENDED TO ASSIST IN ANNIVERSARY PLANNING AND DECISION-MAKING.**

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Each time a significant milestone arrives, few, if any, planners from previous events are in place to debrief. Even if they were, the world has undergone dramatic change over the last twenty-five years. Planning strategies and celebratory events that might have been applicable in the 1990s would almost certainly be considered out of date in today's corporate world. In addition to a natural evolution in leadership and employee base, most businesses have been influenced by:

- Increased diversity and globalization in the workforce, customers, suppliers, and competitors
- New technologies that have resulted in faster pace and larger scale
- A more complex communications environment, less centralized, with more channels
- A changed business situation and strategy

The natural question, of course, is: "What have others companies like us done?" Even good recent case studies are only suggestive, because other companies don't have the same business situation, or the same culture, or the same heritage or history.

Regardless of differences, all companies face the same dilemma: Anniversaries don't have inherent meaning or value. The age of an organization says nothing about the strength of its business model, its vitality in terms of product or service innovation(s), or even its culture at any point in time.

**THE NATURAL QUESTION [IN PLANNING A CORPORATE ANNIVERSARY], OF COURSE IS, "WHAT HAVE OTHER COMPANIES LIKE US DONE?"**

## THE GUMBO MODEL

Think instead of corporate anniversaries as gumbo. It's a remarkably familiar dish by name, but no one prepares it the same way; people mix their own tastes and cultures into their gumbos. In fact, each chef might have a few recipes to choose among, depending on which ingredients are freshest and which variation is most appropriate for the occasion.

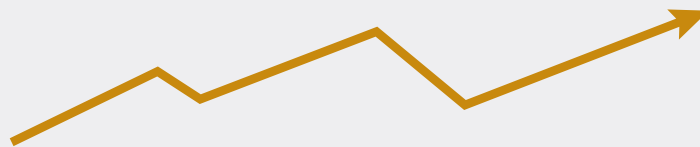
For anniversary milestones, each organization needs to find what is most meaningful at a given point in time. An invaluable anniversary plan aligns current high-priority business objectives while reinforcing the importance of heritage. Two critical success factors determine how well companies respond to this opportunity:

- Determining how to make the anniversary matter to those who matter most
- Interpreting the history and heritage of the organization to develop durable insights and illustrating stories, which help guide the way to the future

If these are the critical success factors, what often undermines the success of an anniversary?

- Not holding it up to the same ROI standards as other major initiatives
- Planning lots of activities but failing to align them with high-priority business objectives and with each other
- Glossing over substantial differences among potential audiences. Employees, customers, communities, and influential third-parties are not at all alike.
- Overemphasizing headquarters and dominant cultures, and not engaging the entire organization

### THINK ROI



THE HISTORY FACTORY BELIEVES CORPORATIONS SHOULD APPLY THE SAME RULES TO ANNIVERSARY PLANNING THAT APPLY TO OTHER STRATEGIC PLANNING AND BUSINESS INVESTING: WHAT DO WE KNOW WE NEED TO ENSURE A STRONG FUTURE FOR THE BUSINESS?

## EARLY PLANNING

Ideally, planning for a major corporate anniversary begins at least two years ahead of time. Even if an organization ultimately decides to limit the investment to a major event or two, early planning makes sure that there is time to execute any program. For instance, suppose that a 100th anniversary was in 2011. Here are several examples of reasons to begin planning in 2009:

- Major day-long or week-long events often require lots of lead time to reserve sites or recruit talent; important guest invitations may need to go out a year or more in advance
- Many companies take advantage of an entire anniversary year, beginning as early as New Year's Eve or New Year's Day
- Initiatives for 2011 may need to begin in 2010, such as a research project whose results would be announced during the anniversary, or the recruitment of 100 endorsements, quotations that must be gathered well ahead of time
- Research into history and heritage, such as collecting artifacts and stories from employees or customers, reviewing archival materials, or even building an archive, is time-consuming
- Books, museums, and major exhibits have a typical lead time of at least 18 months

**IN ITS OVER-30 YEARS, EACH CEO WITH WHOM THE HISTORY FACTORY HAS WORKED CONCLUDED THAT THE GOAL OF HERITAGE MANAGEMENT IS TO SHAPE THE FUTURE, NOT JUST REVEAL THE PAST. OR, AS ONE CEO CLIENT SAID, "WE WANT TO INSPIRE PRIDE IN THE PAST AND IN THE FUTURE."**

Perhaps the most important reason to begin early involves the question, "Who is doing the anniversary planning?" Companies today typically are complex mixtures of regional, national, and perhaps global locations; product divisions; original and acquired businesses; functional and operational employees; and customers, suppliers, and community and national leaders. Planning for an anniversary by engaging these diverse constituencies—either by asking for counsel or actively involving participants from each group—takes time.

## MASTER PLANNING

Developing an anniversary master plan provides a common vision and mission. It enables sound decision-making. Starting with a rigorous situation analysis grounds the planning in the present and future.

- What is happening now?
- Where are we going?
- What elements of our situation can this anniversary help us address? How can leveraging our history and heritage help us move from the present to the preferred future? How do we align all anniversary activities to this end?

In developing a master plan, consider two critical caveats:

- In two years, things will be different—for better or worse, or maybe a little of both. An anniversary might be planned during a strong economic cycle and be executed at the onset of a recession, or vice versa, as with planning for 2011 during 2009. Less obviously, devastating events might occur, such as a natural catastrophe or a product, service, or personnel incident that threatens anniversary messaging. These are considerations for an anniversary master plan, just as they would be for any significant business plan.
- Planners might run into ambivalence. While most social and institutional structures fully embrace the roles of celebration and ritual, as a whole, corporations are less decided. Historically, many organizations often emphasize rugged individualism and rationality, in talking more in terms of the “hard”—structure, roles, rules, and goals—than exploring the “soft”—why people behave the way they do (despite the hard stuff). Corporate culture expert Terrence Deal co-wrote *Corporate Celebration: Play, Purpose, and Profit at Work*, arguing that “...all corporate activity requires human energy to succeed, and human energy is fueled in large measure by ritual and ceremony.” How much a given company seeks to balance the “hard” and “soft” often shapes the type of investments they make in anniversaries.

While the actual planning may be different for each company, the process for engaging numerous stakeholders and building consensus can be quite similar.

- Situation
- Objectives
- Evaluation criteria
- Audiences
- Strategy
- Tactics
- Implementation
- Schedule
- Budget

## ALIGNMENT

Chances are, any anniversary master plan will align with any one or more of four types of activity:

- Improve the telling of the company's story
- Celebrate and reinforce what's most important about the company
- Support specific day-to-day business objectives
- Support major strategic initiatives

Encompassed within each type of activity is a wide range of possible objectives, as examples below illustrate. However, if an anniversary is to be a strategic investment, all tactics and messaging must be tied to anniversary objectives that in turn align with business objectives.

COMPANY STORY	CELEBRATE/ REINFORCE	SUPPORT DAY-TO-DAY	SUPPORT INITIATIVES
archival research	express thanks	selling	strengthen identity: global / acquired companies
oral histories	confirm values	recruiting talent	
discovery programs	strengthen culture	strengthen culture	
history-in-the making interviews	build pride	increasing awareness	
	reinforce brand	emphasizing service ethos	

## EXPLORE ALL OPTIONS

The most difficult part of planning anniversaries might be keeping a thoroughly open mind at the outset of the process. Often there is a lot of pressure to make quick decisions and “get on with it.”

- The word *anniversary* itself conjures birthday and wedding-day milestones. Flower shops, balloon manufacturers, greeting card companies, romantic restaurants, bake shops and, of course, jewelry stores have succeeded by substituting their wares for traditional and often more personal celebrations and rituals.
- Too many roses and frosted cakes have created the risk of default thinking: The only choice is hoopla or the corporate equivalent of red roses—a history book. [Full disclosure: The History Factory researches, writes, and publishes books for clients, as one of its many heritage management solutions.] While publishing a book simplifies decision-making, that doesn’t mean it’s the right medium to convey a company’s business priorities at the time of the anniversary.

“We happily create books for clients,” says Bruce Weindruch, founder and CEO of The History Factory. “However, if there is one thing we really encourage when we talk about anniversaries with clients, it’s this: First, figure out how to take advantage of the milestone to pursue your business objectives. Sometimes, even the word “celebration” can get in the way because we mostly associate the word with things like picnics, galas, logos, banners, and special events. But after everything is said and done, and you’re paying the bills, you’ll want to—and should—ask, ‘Did this really help us do what we had to do?’ Strong, open-minded, upfront planning helps you answer, ‘Yes, and here’s the ROI we got.’”

## HOW TO EXPLORE ALL OPTIONS

Planning for an anniversary is a balancing act. Recognizing this helps draw attention to all options and the need to align tactics with high-priority outcomes. In other words, not only is there no right or wrong answer, but the purpose of exploring these balances is to ensure that all options are reviewed. In the end, companies decide to limit or expand their investments in their anniversaries based on many factors.

**PAST** ----- **PRESENT** ----- **FUTURE**

The History Factory point of view is that there is great value in making those decisions after all the cards are on the table. The first of these “balances” is the familiar continuum shown above.

One natural temptation upon reaching a milestone is to look back and reminisce. That’s what makes history books the “red roses” of corporate anniversaries. It doesn’t take much exploration and discussion before a critical mental shift takes place. Producing even a museum or a book is about the future. Such tactics should beg the crucial question: What about our history and heritage helps us see, and pursue, the future more clearly? “In fact, at The History Factory our mantra is ‘Start with the future and work back,’” Weindruch says. “Our clients are in business to create the future, not to look back. I’m as fascinated with history as anyone, but even my job is to help clients create the future. Interpreting how the heritage of a company helps see and pursue the future, and finding interesting and persuasive ways to tell these stories gives anniversaries their unique meaning for each company at each milestone.”

The next balance is about where to focus the anniversary’s efforts. Companies often struggle with choosing between an internal and an external audience.

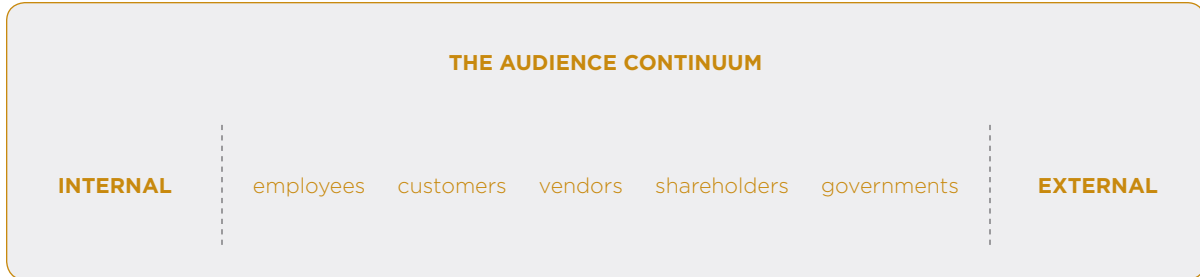
**INTERNAL** ----- **EXTERNAL**

An internal focus refers to employees. An external focus potentially encompasses a wide range of stakeholders, including shareholders, customers, vendors, communities in which offices and facilities are located, experts and academics, government officials, and the media, which help to reach out to those stakeholders.

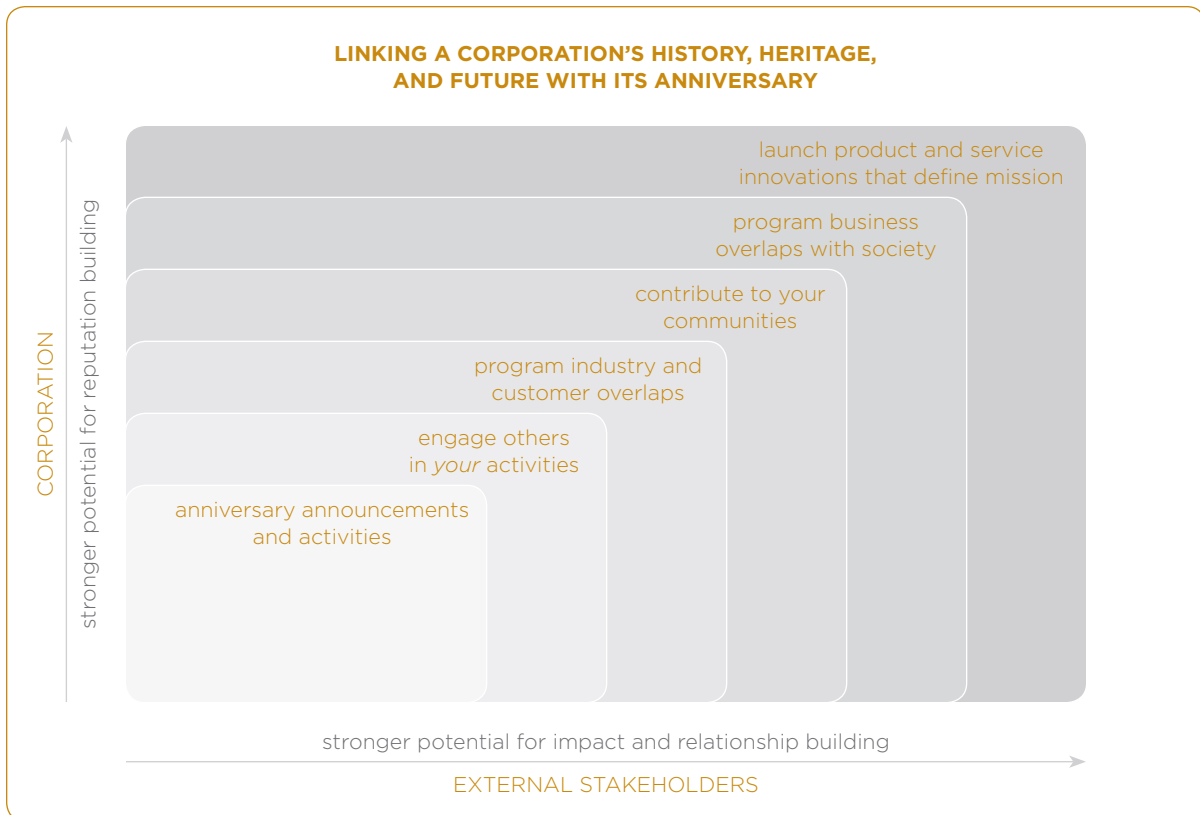
In practice, these audiences overlap in critical ways. A company may reach out to its employees with the specific intent of reinforcing or changing customer perceptions. Similarly, employees often pay careful attention to their company’s public statements and actions, whether toward customers or government officials. Employee reactions can help strengthen or undermine that messaging.



## HOW TO EXPLORE ALL OPTIONS



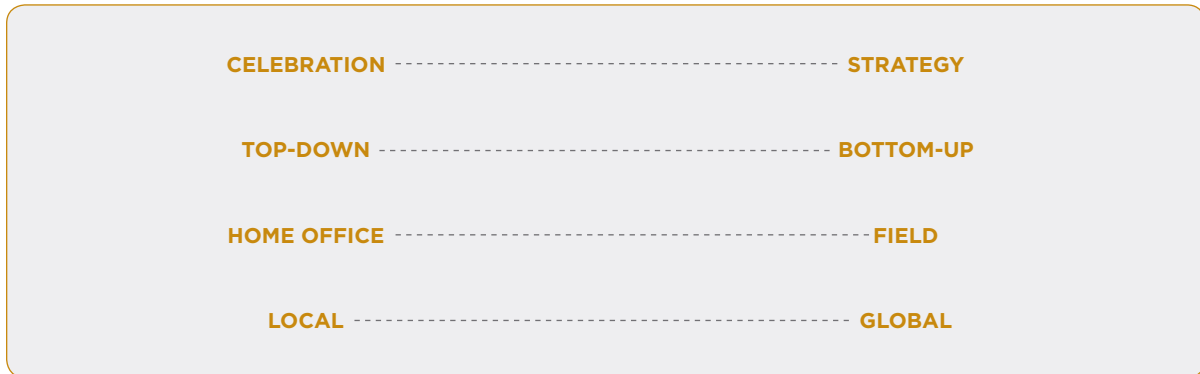
No matter where you set the balance point, there is a crucial mindset issue that establishes how a company defines its anniversary. Thinking of an anniversary as all about the company—with founder stories, timelines, achievements, innovations, and the like—limits the conversation. Expanding the vision so that anniversary storytelling relates the company to all its stakeholders and their interests and lives creates a platform for media, speeches, exhibits, publications, websites, and more. The following graphic illustrates such an expansion.



## HOW TO EXPLORE ALL OPTIONS

### INTERNAL

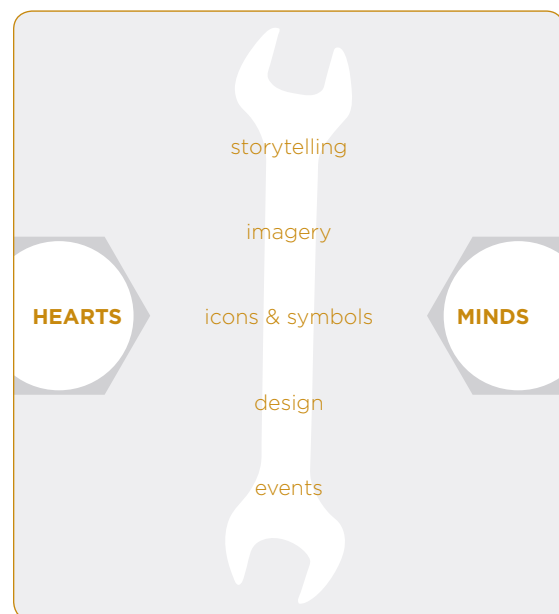
Within an internal audience, there are additional balance points:



These discussions raise a number of issues as a company focuses on employees. The celebration-strategy balance may hold the key. Is the priority to engage employees' hearts and increase their appreciation for the achievements and culture of the organization? Is the priority to reinforce or reinvigorate aspects of values and culture, and commitment to vision and mission?

Celebration is well-suited to these tasks. Strategy, in this case, refers to increasing employee understanding of and engagement in pursuing specific business strategies, and aligning anniversary messaging and activity to that end.

Celebration and strategy are by no means mutually exclusive. Hearts and minds are yet another balance. In fact, the "tools" of celebration such as storytelling, imagery, icons and symbols, design, and events (sometimes including music, speeches, and pageantry) are meant to appeal to both hearts and minds.



## HOW TO EXPLORE ALL OPTIONS

The issues of Top-Down/Bottom-Up, Home Office/Field, and Local/Global also require exploration and discussion. How much of the anniversary is “owned” by employees and how much is directed by management? How does an anniversary become a positive in a highly diverse organization? The larger, more diverse and more spread out a company is, the more complex the discussion.

All companies naturally want branding discipline, continuity of message, and economies of scale. How do you balance these real business needs with the objectives of genuinely engaging employees who may not share the dominant culture (all meanings) or history? How does a company that has grown at least significantly through acquisition use an anniversary to bring everyone together rather than draw attention to separate histories? Do you engage a diverse group of employees in discussing and addressing these issues, and if so, how? This is a time- and resource-intensive exercise; however, doing it right creates real value and progress toward objectives well before the anniversary year begins.

### **EXTERNAL**

External outreach itself can be divided into at least three overlapping categories:

- Reputation (brand perception)
- Relationships (customers, vendors, and communities)
- Policy (local, national, and global)

An early question arises: How much should a company take its competitors into account when planning an anniversary? Is part of its thinking comparative? Again, there is no right answer, just the value in making sure all angles have been explored before a decision is made.

Particularly in today’s media-rich, 24-hour communications environment, it may be best to look at the three external categories as intersecting circles, with the innermost segment where all three circles intersect being a sweet spot anniversaries can cater to. That’s the ultimate in alignment but also in interconnectedness: brand perceptions influence policy, and policy positions and behavior influence brand perceptions. For instance, the recent clamor to be seen as “green” is a strong example. An anniversary program, for its part, might emphasize the environmental awareness throughout a company’s history, and how its current culture continues to support such efforts.

## HOW TO EXPLORE ALL OPTIONS

Scaling it down, the same theme could be focused mainly on customers or communities. Scaling it up, a green campaign easily can involve internal as well as external audiences. Themes that have similar potential include innovation, achievement, community involvement, ethics, and service.

Pushing the green example further brings up an important issue. Few organizations with long histories will have unassailable green credentials. There will be blemishes and, in some instances, truly dark places. However, this is true for any company, and most any issue, as it is true for most individuals. As with all complex messages, credibility and authenticity are essential, but purity is not. This is as true for employees as it is for external stakeholders. Being able to demonstrate, even tangentially, that the green impulse has been continuous throughout a company's history and now will be a major initiative going forward, can be credible. Stories from the past and present that illustrate that theme can help add to that credibility and authenticity. However, if the messaging isn't perceived as genuine, the result may be worse than silence.

## FINAL ANALYSIS

Albert Einstein, speaking about the quest for theories that explain how the universe works, advised us that, “Everything should be made as simple as possible, but no simpler.” The quintessential cynic, H. L. Mencken, warned, in a somewhat similar vein, “For every complex problem, there is a solution that is simple, neat, and wrong.” Actually, neither of these quotes may be what either man exactly said, but they have made it into the common wisdom because they speak to experience.

Anniversaries are challenging because they are not simple and neat, nor is there one clear path to the solution. Psychologists explain that while lots of choices seems like a good idea, most people find that to be a situation that’s more intimidating than exhilarating. Systematically sorting through the choices, as outlined above, makes it easier to identify that cluster of activity that will be most relevant and most helpful to a company approaching an important milestone.

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**FOR MORE INFORMATION,  
CALL THE HISTORY FACTORY AT 703-631-0500  
OR VISIT US ONLINE AT [WWW.HISTORYFACTORY.COM](http://WWW.HISTORYFACTORY.COM)**

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Since 1979, we’ve helped tomorrow’s leaders use yesterday’s accomplishments and lessons learned to gain competitive advantage—today.

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