Case Study 3

Mixed methods message testing for new marketing strategy

Back to menu

Case Study 3

Mixed methods message testing for new marketing strategy

The client

GammaCo: Major tech provider looking to target small-medium businesses (SMB) without alienating their Mid-market (MM) & Enterprise-level (LE) base

01

Context

Buyers in Small Businesses have different priorities than Mid Market or Enterprise business; they wear a variety of hats and may have more complex roles. Their needs may not align with client's "IT First" approach to marketing for MM and LE.

02

Issue

The client developed a refreshed value proposition for SMBs and several Growth Platforms that articulate this value prop. The client needed to make sure messaging resonates with and makes an impact on SMB decision-makers.

03

The ask

Quantitatively and qualitatively…

1. Determine how to refine value prop, if needed, to maximize impact among Small Business.
2. Validate that the value prop is aligned with small business needs.
3. Determine if the Growth Platforms address the key needs of small business, and how to refine them.
4. Understand if Growth Platforms articulate and connect to the value prop.

The solution

Instrument: We needed to know if our messaging strategy moved the needle with our new audience, Small Businesses, in the face of our competition. Further, we needed to understand *why* our messaging succeeds (or doesn't) to (1) make refinements and (2) guide 2026's messaging strategy beyond the messages tested explicitly in this program. To that end, we deployed a quant-qual program to deliver on measurement and refinement.

<u>Quant</u>: An online 20-minute survey of 1,800 Business Decision Makers (BDMs) and IT Decision Makers (ITDMs) in small and mid-market businesses in US, Germany, and India

<u>Qual*</u>: 12 60-min video In-Depth Interviews (IDIs) among BDMs and ITDMs in small and mid-market businesses in the US

Timeline: 8 weeks

My role:

1. Client communication (w/ team)
2. Quant survey development
3. Quant data analysis
4. Integration of Qual & Quant results, story-development & visualization (w/ team)

*the following slides only detail the my contributions (i.e., the quant analysis and integrated report)

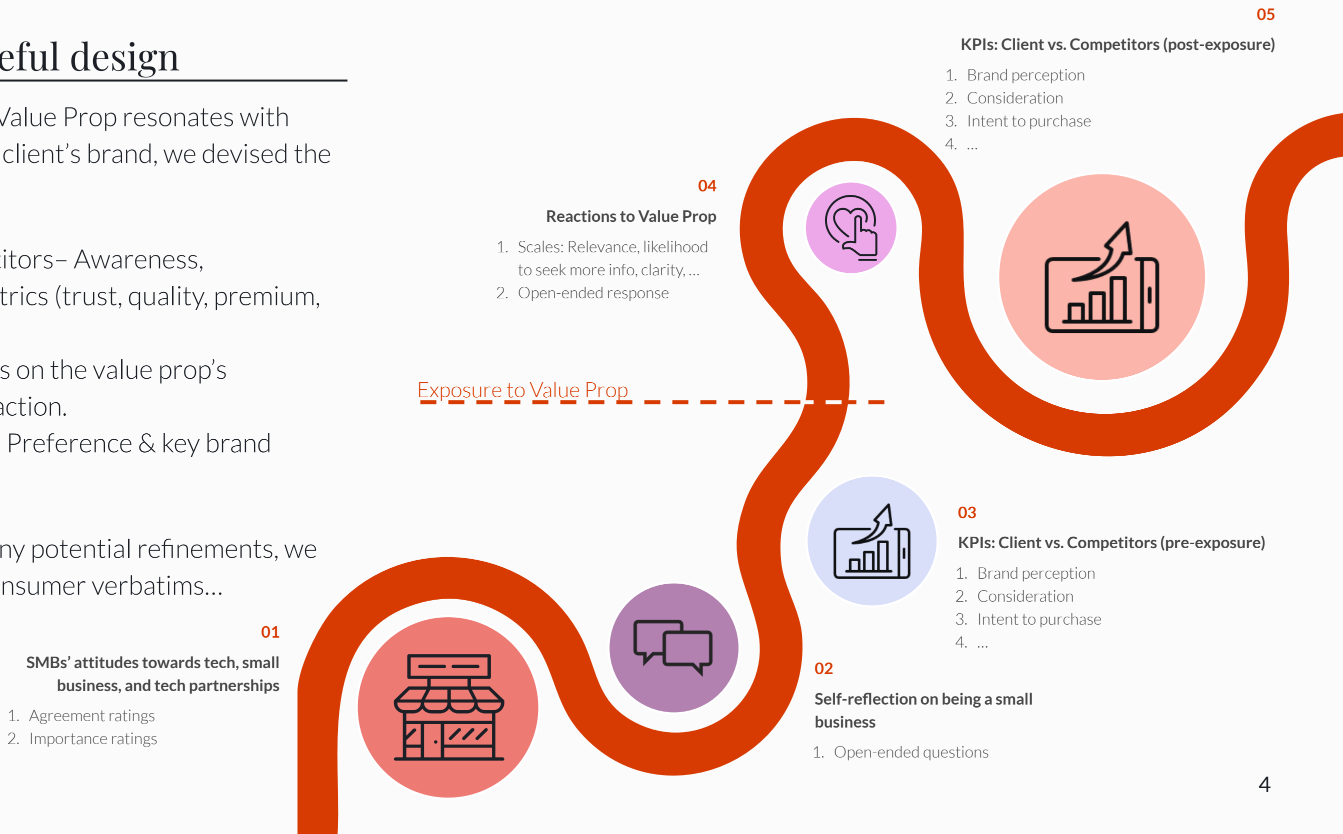
Analysis plan

Satisfying the brief with purposeful design

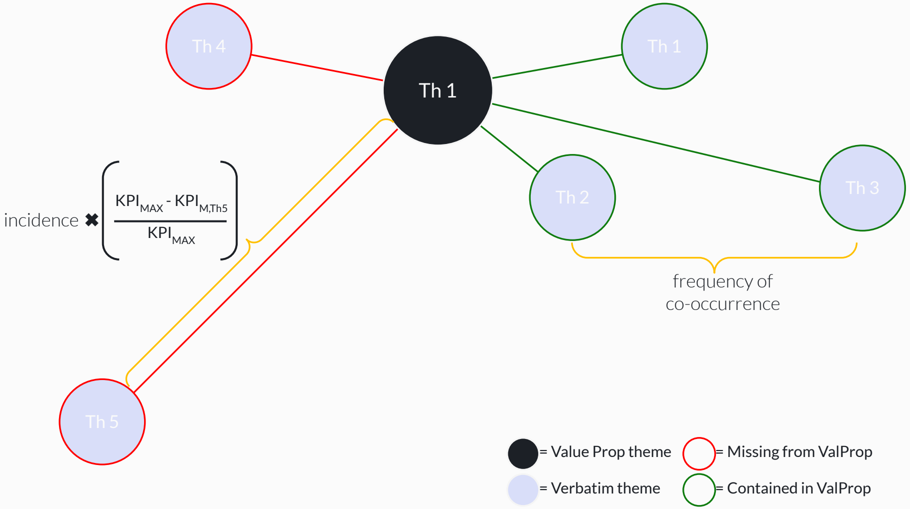
To get a read on *whether* and *by how much* the Value Prop resonates with SMB decision makers and reflects back on the client's brand, we devised the following plan of attack:

1. Pre-read on KPIs for client and key competitors– Awareness, Consideration, Preference & key brand metrics (trust, quality, premium, innovative)
2. Exposure to value prop, followed by ratings on the value prop's relevance, clarity, uniqueness, and impact/action.
3. Post-exposure read on KPIs– Consideration, Preference & key brand metrics (trust, quality, premium, innovative)

To address *why* the Value Prop succeeds and any potential refinements, we deployed a bespoke quantitative analysis of consumer verbatims…



Wringing nuance from a stone



*circles closer to VP theme are more important (occur more frequently and have greater average KPIs) than further circles
** circles closer to each other (on each side of VP theme) co-occur more frequently

Quanting the qual to better understand our SMBs

We designed the quant survey to measure KPIs (e.g., *brand preference, consideration, etc.*) both pre- and post-exposure to the value prop and growth platforms to see whether messaging strategy boosted these figures.

However, the KPIs on their own don't tell us *why* the messaging strategy "wins"/"loses" or *how to refine it*.

To that end, we had participants describe what it meant to be a small business in their own words.

Using an AI-assisted thematic analysis, we captured and quantified key themes, including feelings of self-sufficiency, perseverance (in the face of larger businesses), and having a lack of resources.

We then performed a similar thematic analysis on the Value Prop itself. We triangulated the thematic analyses with the KPIs to learn how, whether, and why the Value Prop resonated.

Reporting excerpt

The following slides are an excerpt from a larger report.

Slides 77 - 80: Getting to know SMB decision makers through their attitudes and needs

Slide 81: The stimulus (i.e., the Value Prop)

Slides 82 - 83: Measuring the impact of the Value Prop on [client]'s brand / perception

Slide 84 - 86: Using verbatims to target areas of improvement in Value Prop

Slide 87: Revising the Value Prop revision based on learnings

Many Small Businesses consider themselves to be tech savvy and keep up with current trends.

Attitudes about Tech

There is a level of confidence and pride in being a small business decision maker. Lenovo will want to consider a tone that respects this sentiment and position itself as value-added partner to an already tech savvy customer.

44%▲ feel that they are a very tech savvy company

45%▲ feel that technology is a strategic priority in their company

38%▲ are confident that they can solve any tech problem that comes up

17%▼ don't have the time to keep current on tech trends

% Strongly agree; *Arrows indicate statistically significant differences from average
Base: Total (n=1,773); United States (n = 600), Germany (n = 573), India (n = 600)
A2. How much do you agree or disagree with each of the following statements about the organization you work for? (For a full list of metrics, please see appendix.)

Small Business decision makers are busy people, but they are not all proactively looking for guidance

Attitudes about Business

These decision-makers have a lot to keep up with, but it's not necessarily a pain point: only about 1 in 3 feel they need more guidance. The exception is AI implementation.

It will take education about the value-added offer to convince them what we can provide.

42% ▲

of Small Business decision makers say they 'wear many hats' in their organization

38% ▲

say one person or department is responsible for IT purchasing for their whole company

32% ▼

wish they had more guidance on what tech solutions / services would best support their company's growth

43% ▲

feel that AI will be an important growth engine, but they need to know how to implement it

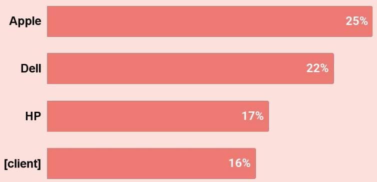
% Strongly agree; *Arrows indicate statistically significant differences from average
Base: Total (n=1,773); United States (n = 600), Germany (n = 573), India (n = 600)
A2. How much do you agree or disagree with each of the following statements about the organization you work for? (For a full list of metrics, please see appendix.)

Although they don't expect it from any tech provider, having a partner that understands their business needs is motivating

Tech providers are perceived to be mostly the same, but they're open to hearing from brands.

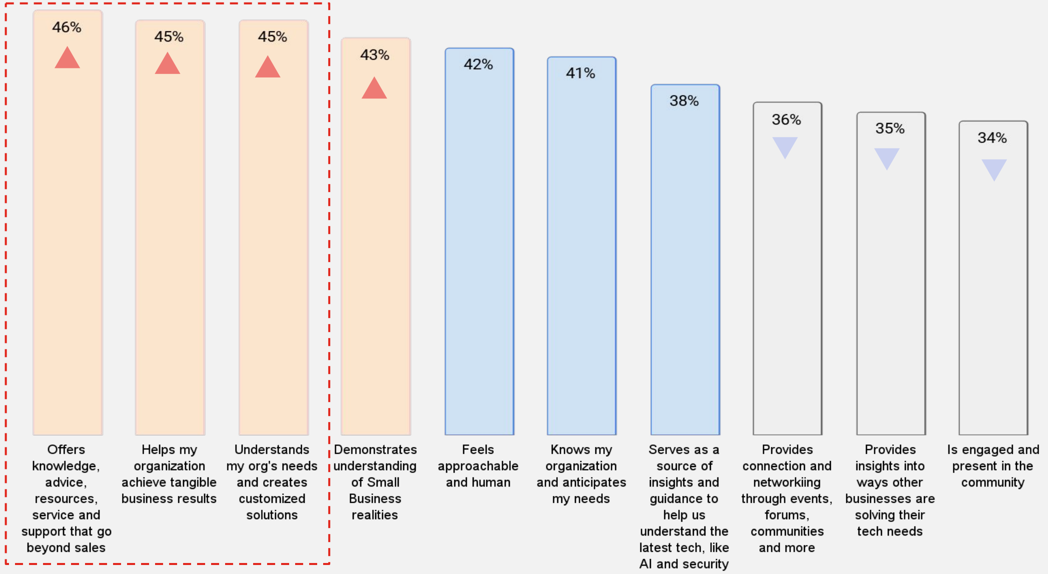
This opens the door for [client] to uniquely differentiate itself as a partner.

Brand Preference*



Only about 1 in 3 prefer to stick with tech brands they know.

What do small business DMs need from tech providers?



% 'Extremely important', Arrows indicate statistically significant differences from average
Base: Total (n=1,773); United States (n = 600), Germany (n = 573), India (n = 600)
A3. Think about what your organization needs when choosing a technology partner. How important are each of the following to your choice of which technology partner to work with?
*Source: Brand Health Tracker_B2B_ITDM_WW_SMB_Q4FY25

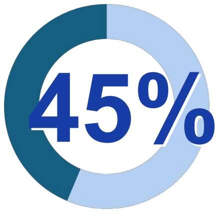
Tech challenges are a top concern but with limited resources they typically navigate the solutions on their own

Tech concerns

- Keeping up with new tech, especially AI
- Cyber-security
- Catering to the varying hardware needs of their employees
- Managing tech needs of a remote workforce
- Getting quality devices at a good price

For guidance and support, they need to take a more resourceful approach which includes:

- Reaching out to former colleagues and peers for advice,
- Researching on Google
- Attending webinars and occasionally conferences
- Subscribing to newsletters



Strongly feel that technology is a strategic priority in their company.

“***I have contacts from my previous work experience and, some mentors*** *that I run these things by. I also follow whatever is going on in the world.”*

- SB, ITDM, United States

“*I'd say right* ***now my source of information is reading and studying what I find on the Internet*** *about it.”*

- MM, ITDM, United States

What does this mean for the value prop?

We must **position Lenovo as an essential partner that helps them solve these challenges;** that **they too are deserving of outside support** so that they can compete in a tech-forward world.

Base: Total (n=1,773); United States (n = 600), Germany (n = 573), India (n = 600)
A2. How much do you agree or disagree with each of the following statements about the organization you work for?

The value prop, and supporting pillars, we showed Small Business decision makers

[Client] delivers the tech edge your Small Business needs to thrive — smarter, faster, and more secure focused on delivering real business outcomes.

We’re more than a provider – we’re your trusted partner, a business & tech advisor helping you grow, adapt & succeed in a rapidly changing world by offering end-to-end technology that is scalable, AI-ready, and focused on your specific needs.

01 **Built for Business**

- End-to-end offerings: laptops, desktops, workstations, smartphones, servers, software, services and accessories
- One of the most innovative tech portfolios in the industry
- Dedicated Small Business sales and support teams.
- Flexible pricing options to tiered membership and financing solutions

02 **Powered by AI**

- A global leader in AI
- We simplify AI so that it is personalized and learns user preferences
- Intelligent tools that help boost productivity, streamline operations, & improve decision-making through AI
- With our AI tools, drive growth, improve agility, & keep ahead of the competition.

03 **Tailored for you**

- Personalized technology recommendations based on your goals and challenges.
- Proactive support for early threat detection and compliance solutions
- Flexible & scalable, designed to grow with you.
- Small Businesses always-on guidance, exclusive offers, relevant resources, and lifecycle services

We're at a good starting point: Our Value Prop lands well across markets and business sizes.

However, when tailoring the Value Prop, we'll need to push hardest on uniqueness

		Likelihood to seek information (% 'Definitely will')	**Uniqueness** (% 'Extremely new and different')	**Relevance** (% 'Extremely relevant')	**Clarity** (% 'Extremely easy to understand')
	Value Prop	46%	35%	43%	43%
Supporting Pillars	**Built for Business**	44%	31%	41%	42%
	Powered by AI	44%	34%	42%	42%
	Tailored for you	45%	32%	40%	42%

Base: Total (n=1,773); United States (n = 600), Germany (n = 573), India (n = 600)
B2: How relevant to your organization is this description of what Lenovo can provide? [Top box score]
B3: How easy to understand is this description of what Lenovo can provide organizations like yours? [Top box score]
B4: How new and different from other companies is this description of what Lenovo can provide organizations like yours? [Top box score]
B5: How likely would you be to seek information about Lenovo based on this description? [Top box score]

- The primary call to action is strong, indicating a high level of excitement about the offering
- All three pillars (Built for Business, Powered by AI, and Tailored for You) are compelling and essential to the overall offering
- But only 1 in 3 Small Business decision-makers feels the offer is 'extremely new and different' from messages they've heard from other providers

Further, the value prop boosts perceptions of [client], particularly around its portfolio and advanced products

This shift in perception suggests that, before reading the value prop, consumers were not fully aware of all that [client] can offer beyond hardware.

Perceptions of [client] pre- and post-exposure to the Value Prop

(% strongly agree)

	Comprehensive portfolio	Advanced products	Innovative Brand	Quality products	Premium Brand	Trusted Brand
Post-exposure to Value Prop	52%	52%	54%	53%	51%	49%
	+14%	+12%	+10%	+8%	+6%	+1%
Pre-exposure to Value Prop	38%	40%	44%	45%	45%	48%

Base: Total (n=1,773); United States (n = 600), Germany (n = 573), India (n = 600)
A7 (pre): Please indicate how much you agree or disagree with the following statements about [client]
B30 (post): Please indicate how much you agree or disagree with the following statements about [client]

Specific language acknowledging hardships that SMBs face meets decision makers where they are

Value Proposition

[Client] delivers the tech edge your Small Business needs to thrive — smarter, faster, and more secure focused on delivering real business outcomes.

We're more than a provider – we're your trusted partner, a business & tech advisor helping you grow, adapt & succeed in a rapidly changing world by offering end-to-end technology that is scalable, AI-ready, and focused on your specific needs.

63%
conceptual alignment with decision-makers' view of SMBs

The Val Prop aligns with how small business owners view their own struggles

01

"[SB] brings to mind startups, family-owned businesses, businesses struggling to survive, especially in harsh economic realities." – MM, BDM, United States

"…[SBs] make me think of family on a boat in the middle of the ocean, vice versa big companies have a cruise ship..." – SB, BDM, United States

"A growing company that requires a great deal of support to succeed." – MM, BDM, United States

Explicitly, SMB decision makers call out key Val Prop themes as critical touchpoints

02

'I like that Lenovo presents itself as a true partner rather than just a vendor – SB, IDTM, United States

I like how it has the best interests for small businesses in mind and wanting them to grow and achieve great potential , I also love that they actually want to teach and help, not just make money off of small business. – MM, ITDM, Germany

The way it demonstrates that it committed to small businesses like us, like providing full end to end technology solutions, having a sales team specially for small businesses and their unique needs, providing scalable solutions for small [businesses] with flexible pricing – SB, ITDM, India

Base: Total (n=1,773); United States (n = 600), Germany (n = 573), India (n = 600)
A2b: When you hear the term 'small business' what images, emotions, or ideas come to mind? (open ended responses)
B27a: What do you like about this description of Lenovo?

Language surrounding partnerships delivers what SMB decision makers are searching for

Value Proposition

[Client] delivers the tech edge your Small Business needs to thrive — smarter, faster, and more secure focused on delivering real business outcomes.

We're more than a provider – we're your trusted partner, a business & tech advisor helping you grow, adapt & succeed in a rapidly changing world by offering end-to-end technology that is scalable, AI-ready, and focused on your specific needs.

58%

of relevant comments mentioned partnership as something they liked about the value prop

The Val Prop aligns with how small business owners view their own struggles

01

"[SB] brings to mind startups, family-owned businesses, businesses struggling to survive, especially in harsh economic realities." – MM, BDM, United States

"…[SBs] make me think of family on a boat in the middle of the ocean, vice versa big companies have a cruise ship…" – SB, BDM, United States

"A growing company that requires a great deal of support to succeed." – MM, BDM, United States

Explicitly, SMB decision makers call out key Val Prop themes as critical touchpoints

02

'I like that Lenovo presents itself as a true partner rather than just a vendor – SB, IDTM, United States

I like how it has the best interests for small businesses in mind and wanting them to grow and achieve great potential , I also love that they actually want to teach and help, not just make money off of small business. – MM, ITDM, Germany

The way it demonstrates that it committed to small businesses like us, like providing full end to end technology solutions, … , providing scalable solutions for small [businesses] with flexible pricing – SB, ITDM, India

Base: Total (n=1,773); United States (n = 600), Germany (n = 573), India (n = 600)
A2b: When you hear the term 'small business' what images, emotions, or ideas come to mind? (open ended responses)
B27a: What do you like about this description of Lenovo?

We can’t do it all, nor should we.

Value Proposition

[Client] delivers the tech edge your Small Business needs to thrive — smarter, faster, and more secure focused on delivering real business outcomes.

We’re more than a provider – we’re your trusted partner, a business & tech advisor helping you grow, adapt & succeed in a rapidly changing world by offering end-to-end technology that is scalable, AI-ready, and focused on your specific needs.

27%

conceptual misalignment with decision-makers’ view of SMBs

Although prevalent and important, other common themes shouldn’t be incorporated into our messaging strategy

03

“Small businesses face many problems, primarily due to their limited financial resources (due to marketing difficulties), brand weaknesses, and low labor attraction.” – MM, BDM, Germany

“An organization with limited resources & limited staff members which has great ideas and looks to grow.” – SB. BDM, India

“Small budget, small team, local mostly, poorly financed, not as respected.” – SB, BDM, United States

Base: Total (n=1,773); United States (n = 600), Germany (n = 573), India (n = 600)
A2b: When you hear the term ‘small business’ what images, emotions, or ideas come to mind? (open ended responses)

Our Value Prop, reimagined into consumer-facing copy, better meets the expectations of SMBs without alienating larger businesses

As a small business, you are accustomed to doing more with less. At [client], we recognize and respect this mindset and work ethic, and we believe that you merit the attention, support, and resources than can help you achieve your goals.

With [client] backing your business, you'll get the technological advantage your small business ~~requires~~ deserves to prosper—delivering smarter, faster, and more secure solutions that drive meaningful business results.

We're more than a provider – we're your trusted partner, a business and tech advisor helping you grow, adapt and succeed in a rapidly changing world by offering:

- End-to-end technology–from hardware to software and including services and accessories–all from a single trusted provider and tailored to your individual business needs
- Technology services and AI expertise to help your business identify when, where, and how to leverage AI for optimal benefit
- Flexible pricing options to align with your budget
- ~~Educational resources, industry best practices, and connection to businesses like yours around the world~~

1. Restating core truths relevant to their personal narrative in a way that recognizes and celebrates their efforts.
2. Reference to Growth Platform tagline. 'Deserves' instead of 'requires' respects their tech-prowess
3. Added clarity on the breadth of Lenovo's portfolio to provide relevant context and credibility to our offer.
4. Mentions AI specifically and speaks to their immediate AI need of understanding.
5. Prioritize flexible pricing over educational resources.