

The Need States Framework™

Your best teaching opportunities are found at the confluence between the content you could credibly teach and the content your consumers are actively seeking while also considering your brand. Following these three steps can help you find that sweet spot for your brand. (to support your use of this template, we have created a worked example on the following pages).

Step 1: Identify the life stages or need states that align with a consumer's consideration of your product or service.

Step 2: List the associated values, interests, or concerns your consumer is likely experiencing at the same time.

Step 3: Ask yourself if your brand could credibly provide educational content in those areas.

1. Relevant Need States or Life Stages

2. Associated Interests or Concerns

3. My Brand's Credibility?

Notes:

The Need States Framework™

Example 1: Financial Services

The brand in this example is a major financial services organization that provides a variety of products and services in wealth management, estate planning, and more. They are currently trying to deepen their relationship with single women, ages 45-55. Research shows that women control over 30% of the wealth in the country, yet invest at relatively low rates.

1. Relevant Need States or Life Stages

After a major life event (divorce, death of a loved one, birth of a child, children leaving the nest, losing/quitting a job, retiring).

2. Associated Interests or Concerns

- *Managing a budget*
- *Planning for college*
- *Downsizing*
- *Travel and other Adventures,*
- *Healthy Aging*
- *Investing in the Stock Market*
- *Teaching Kids about Money*
- *Recovering from personal loss*
- *Happy Retirement,*
- *Planning Act 2*

3. My Brand's Credibility?

- *Yes*
- *Yes w/partnerships*
- *Yes w/partnerships*
- *Maybe w/partnerships*
- *Not a good fit*
- *Yes*
- *Yes (potentially w/partnerships)*
- *Maybe w/partnerships*
- *Yes*
- *Yes w/partnerships*

Analysis: *This brand knows that their target demographic most often considers connecting with their wealth management services when they've experienced a major life event. And those major life events tend to correspond with active exploration into a lot of different areas – some directly related to services provided by the brand and some not at all. Almost all, though, with the right partnerships or strategy, might present great opportunities for a meaningful branded education solution that helps form deeper connections with their target.*

The Need States Framework™