



Marketing Services by Example

Two of the world's leading energy companies turned to our agency to drive operational performance and marketing effectiveness—all while retaining some of the largest global advertising agencies.



We developed the B2B, B2C and PR tools to help implement the conversion of 14,000 Texaco stations to the Shell brand.

This case study highlights how a boutique, agile marketing approach created transformative results for Texaco and Shell during one of the largest rebranding initiatives in U.S. business history.

Case Study: Transforming Marketing Operations for Two Energy Giants



Applying the iconic Texaco Star logo as a starting point we designed the exterior graphics motif for the generic “Star 21” Texaco retail facility.



The Shell Retail Visual Identity matching the international brand standards with a co-branded Burger King QSR.

Prior Experience



Before leading transformative initiatives for Texaco and Shell, we honed our expertise as the Director of Communications for American Medical International (AMI), a Fortune 100 healthcare company operating 268 hospitals worldwide with over 50,000 employees.

Based in Los Angeles, AMI relied on effective communication strategies to streamline its vast operations. Our role encompassed developing strategic messaging, crafting resource materials, and implementing communication tools to enhance organizational efficiency across a complex, global network. This experience laid the groundwork for managing large-scale marketing and communication projects with precision, creativity, and measurable impact.

Background: A New Approach to Marketing

In 1995, Texaco sought a nimble, boutique-style marketing partner to complement their global ad agency. The goal was to find a firm capable of tackling special projects with speed and flexibility—attributes often missing in large agency operations. Texaco wanted a hands-on marketing, communications, and PR partner who could seamlessly integrate into their operations to help manage and grow their brand.

We assembled a team of seasoned professionals with the perfect balance of creativity, experience, and business acumen. Unlike traditional agencies focused solely on brand advertising, this team worked collaboratively across Texaco’s functional departments, crafting cohesive marketing programs and tools to ensure smooth execution and measurable success.

Expanding the Partnership: Texaco and Shell

By 1999, after five years as Texaco’s marketing, communications, and PR partner, our firm was retained to navigate a critical milestone: the formation of a joint venture between Texaco and Shell to merge their U.S. refining and marketing operations. A comprehensive study of the two brands’ business practices positioned Texaco as the leader in operational efficiency. This distinction led to our selection as the marketing and PR agency for both brands.

The Challenge: Modernizing and Rebranding at Scale

With the joint venture in place, Royal Dutch Shell mandated a Retail Visual Identity (RVI) program to modernize 15,000 Shell retail facilities across the U.S., aligning them with Shell’s global design standards. Shortly thereafter, Shell acquired Texaco’s interest in the venture and extended the RVI initiative to rebrand 14,000 Texaco locations to the Shell brand.

The rebranding of over 14,000 Texaco stations to Shell by 2004. This high-stakes, market-by-market transformation required precision planning, seamless execution, and the support of tens of thousands of stakeholders across Shell’s organization and its network of independent retailers.

Our Solution: Comprehensive Marketing and Communication Tools

To meet the challenge, we developed localized campaigns and pre-construction promotions to build consumer awareness and grand reopening campaigns to drive customer retention and growth.

Custom Communication Tools: Comprehensive kits for Shell’s marketing field offices and channel partners, including signage, co-op funds, direct mail, and national-brand merchandise dis-

Media Rollouts: Regional and local advertising campaigns featuring TV, radio, and on-site activations to maximize awareness and impact.

Stakeholder Engagement: Persuasive communications to encourage independent retailers, who owned 80%+ of Shell-branded facilities, to invest in upgrades and synchronize with corporate-owned locations.

Results: Execution Under Pressure

With only three months to the launch of the first markets, our team faced a tight deadline to create tools that would inform, engage, and motivate a vast network of channel partners and internal stakeholders. These efforts culminated in a seamless rollout, closely monitored by Royal Dutch Shell executives.



The U.S. adoption of the Shell international facility design standards was much more than an exterior upgrade. The intent was to deliver a new customer experience by revitalizing the Shell brand in every way, from the exterior look to merchandising and customer service.

A comprehensive brand advertising campaign and unique local store marketing (LSM) program were critical elements along with an array of collateral, signage and neighborhood gas incentives and media programs.

APPLY NOW! TRIPLE REBATES

on all purchases for your first 60 days.

That's
35¢/gal

Plus a 3¢ rebate

Shell logo

We honor other gas cards.

Shell Card

Apply today!

Shell logo

Stretch your fuel. Learn how.

Money saving coupons on back.

Grand Opening

Shell logo

FuelStretch

Money-saving fuel card

\$2 OFF on 10 gallons in store at Shell gas station

\$2 OFF on 10 gallons in store at Shell gas station

Shell logo

POWER SIGNS 2006

Shell logo

Shell Card

Citi MasterCard

INSTOCKUBERRY

Up Building / Pole Sign / 10 Gallon

Pole Sign / 10 Gallon

Shell logo

Welcome to your new Shell station!

Shell logo

Earn 5% Rebates on Shell Gasoline

Details Inside

2006 Co-op Advertising and Development Program

Shell logo

Gift Card

\$50

\$25

\$100

Shell logo

Shell Platinum MasterCard® Rebate Pole Sign Flexible Pricing Signage

Eligible for 100% Co-Op Rebate

Earn Rebate

Per Gallon

Shell logo

REBATE PRICING	Shell Signage	Shell Signage
3,000 - 3,999	10	10
4,000 - 4,999	11	11
5,000 - 5,999	12	12
6,000 - 6,999	13	13
7,000 - 7,999	14	14
8,000 - 8,999	15	15
9,000 - 9,999	16	16
10,000 - 10,999	17	17
11,000 - 11,999	18	18
12,000 - 12,999	19	19

HOW TO ORDER

Call Shell Customer Service at 800-762-5213

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A.1



A.2



A. Communications Tools Developed for Rebranding Success

What We Did:

Developed Comprehensive Communication Materials to Complement Advertising & Promotional Campaigns.

To support the rebranding initiative and complement the national advertising campaign, we created a suite of communication tools designed to ensure clarity, consistency, and engagement across all levels of the program. Meeting tight deadlines with precision, these tools became essential for field personnel, channel partners, and retailers in understanding and executing the initiative.

Key Deliverables:

Internal Program Guide (A.1)

A comprehensive, detailed manual created for brand coordinators and marketing field representatives.

This guide provided a complete overview of the initiative, including:

- Objectives, benefits, and program elements.
 - Procedures, timelines, and available resources.
 - Responsibilities of field teams in rolling out the program.
 - Details on other marketing programs available to retailers and wholesalers to support the initiative.
- Designed to ensure field representatives had everything they needed to execute their roles effectively.

Channel Partner Introduction Booklet (A.2)

A succinct, easy-to-understand booklet created for retailers and wholesalers.

- Focused on answering critical questions:
 - What is the initiative?
 - Why is it important?
 - When will it occur?
 - How will it be implemented?
 - What's in it for me?
- Included descriptions of the three facility upgrade levels available to retailers.
- Highlighted what channel partners could expect from their marketing coordinators, ensuring accountability and transparency from the field reps.

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A.3



A.4



Extranet RVI Digital Resource Hub (A.3)

A dedicated RVI site hosted on Shell's Alliance extranet. Initially mirrored the printed materials, with the advantage of realtime updates reflecting program changes or new promotions. Provided a centralized platform for accessing all relevant materials, ensuring ease of use and up-to-date information for stakeholders.

The RVI site we developed contained 3 main sections.

1. Document download section to access the latest program updates
2. Promotions section to access the latest promotions by region and category
3. Local store marketing (LSM) section to cover tips and instructions on how to develop an LSM program including:
 - Surveying your market
 - Establishing objectives
 - Determining strategies
 - Developing activities
 - Executing a plan
 - Evaluating the results

“Flower Power” and Shell (A.4)

One of the important visual keys of the Shell retail identity was the use of flowers and greeneries to enhance the overall look of the facility, creating an inviting environment for customers. This landscaping guide was created to assist retailers in selecting the suitable flower types for each geographical region. The guide also covered proper cultivation and fertilization, and provided a landscaping layout guide.



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B.1



B. Enhancing Ancillary Services

Innovating Local Store Marketing (LSM): A Custom Solution

In addition to the core communication materials developed for the RVI initiative, we contributed to the program's success by addressing the unique marketing needs of individual retailers. Recognizing the limitations of national media campaigns, we devised a groundbreaking online solution to empower retailers with customized local store marketing tools.

Challenge

National advertising campaigns created by agencies like JWT and Ogilvy focused on universally available services such as gasoline and credit cards. However, individual gas stations offered diverse ancillary services, such as:

- Convenience stores.
- Car washes.
- Auto centers.
- Fast-food partnerships.

These services were critical revenue drivers that weren't highlighted in national campaigns. Retailers needed a cost-effective way to create promotional materials tailored to their unique offerings.

Solution: The First-Ever Online LSM Tool (B.1)

To address this gap, we proposed and developed an innovative online customizable Local Store Marketing (LSM) system:

Customizability:

Retailers could log into Shell's Alliance extranet from their backoffice PC and design promotional materials tailored to their specific service mix.

Efficiency and Cost Savings:

The system aggregated orders from multiple facilities. Centralized printing and distribution streamlined production costs.

Ease of Use:

Templates were intuitive and designed to reflect Shell's branding while offering flexibility for individual messaging.

Impact

High Engagement:

Response rates for promotions created via the LSM system exceeded 27%, surpassing typical direct marketing response benchmarks.

Scalability:

The tool became a vital component of the RVI initiative, enabling thousands of retailers to execute localized campaigns that efficiently complemented the overarching rebranding efforts.

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B.2



Leveraging Other Marketing Programs to Strengthen RVI Implementation

The Retail Visual Identity (RVI) initiative presented significant challenges due to the extensive capital investments required for facility upgrades and the necessity for synchronized execution across market areas. Independent retailers and wholesalers owned more than 80% of Shell's retail sites, compounding the situation. To make participation feasible, channel partners needed a clear path to profitability and accessible financing options.

Supporting Field Personnel with Comprehensive Marketing Knowledge

Field marketing personnel were instrumental in persuading channel partners to adopt RVI standards. To empower these teams, we developed tools that:

- **Showcased Business Growth Potential:** Demonstrated how RVI conversions could drive profitability.
- **Highlighted Program Interconnectivity:** Illustrated how existing marketing programs complemented the RVI initiative to create a compelling business case.

Programs to Enhance Profitability and Drive Adoption

By the time we were engaged in creating communication tools for the RVI initiative, we had already collaborated with Texaco and Shell to develop a suite of initiatives to enhance retail operations and profitability. These programs became integral to supporting RVI adoption:

B.2 Co-branding Assistance Program

We are encouraged to add branded retail businesses, such as Quick Service Restaurants (e.g., McDonald's), to Shell locations.

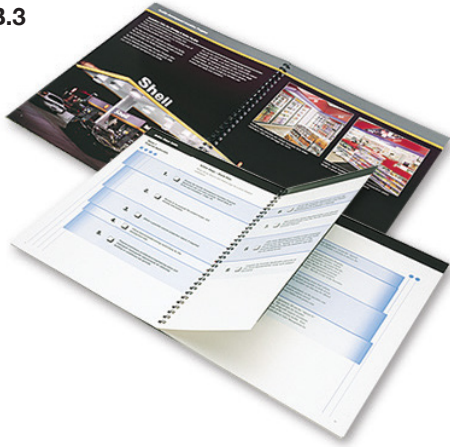
- Provided site evaluation tools to analyze suitability.
- Offered profiles of potential co-brand partners with operational insights.
- Delivered guidance on franchise operations, focusing on fast food services.



"Real Food" Campaign
Window Display for C-stores.

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B.3



B.3 Facility Development Incentive Program

Provided financial incentives to channel partners for facility upgrades, ensuring alignment with RVI standards.

B.4



B.4 Facility Development Financing Program

In partnership with a significant financial institution, we introduced industry-specific financing options.

- Developed step-by-step action guides tailored to field reps and borrowers to synchronize their efforts.
- Created a cash flow analysis model that allowed brand coordinators to input site-specific financial data and perform “what-if” scenarios, demonstrating the economic impact of upgrades, revenues, and loan payments.



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B.5



Shell FormulaFinish branded car wash introduced in conjunction with the RVI rollout.

B.5.1



B.5 Formula Finish Branded Car Wash Program

Designed to revitalize Shell's network of car washes, this program integrated:

- Branding Design: Evident architectural elements.
- State-of-the-art Equipment: Enhancing efficiency and customer satisfaction.
- Customer-Focused Strategies: Comprehensive operational guidance for retailers.



B.5.1 Formula Finish Program Implementation Guide

Provided internal personnel with a detailed blueprint for program execution, covering:

- Key components of the branded car wash program.
- Facility design variations and signage.
- Site evaluation worksheets.



Shell tested exterior designs and this lovely test site was difficult to permit in some locations. The upper left version is the national standard.

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B.5.2



B.5.2 Formula Finish Brand Standards Guide

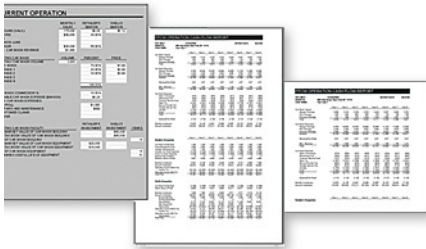
Outlined operational and image standards for branded car washes, including:

- Facility design and signage guidelines.
- Cashier training materials to promote upgrades and ensure service consistency.
- Complaint-handling procedures.

B.5.3 Formula Finish Site Analysis Tools

Developed a detailed profitability analysis, comparing “status quo” scenarios to branded car wash upgrades from the company’s and retailer’s perspectives.

B.5.3

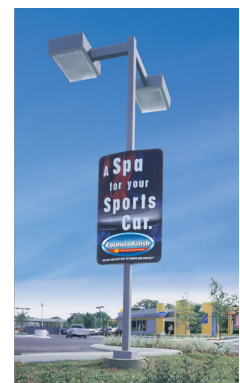
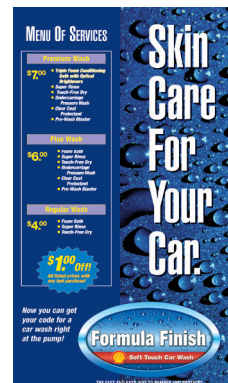


B.5.4 Formula Finish Local Site Marketing Package

Tested and refined a multi-channel promotional campaign to maximize response rates, including:

- Direct mail campaigns, flyer distributions, and ad inserts in local publications.
- On-site promotional materials and point-of-sale assets.
- Achieved response rates as high as 27% in select test markets.

B.5.4



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B.5.5



Seamless Integration

The Merchandising Tool Box ensured that independent retailers could effectively adopt category management techniques without the need for extensive prior experience. Its combination of user-friendly printed materials and a robust digital component offered flexibility, scalability, and real-time updates to keep retailers competitive in a dynamic market.

By equipping retail operators with these tools, Shell strengthened its relationship with channel partners, enhancing the consistency and profitability of Shell-branded retail locations across the network.

B.5.5 Merchandising Tool Box

To support independent retailers and wholesalers, we collaborated with merchandising category managers to develop the Merchandising Tool Box—a comprehensive program designed to transfer the knowledge and best practices of category management to noncompany-owned retail outlets.

This program empowered retailers with resources to optimize their operations, improve in-store sales, and compete effectively by leveraging Shell's expertise. The program combined printed materials with a digital media component, ensuring accessibility and real-time updates while allowing participants to pool purchasing power for cost efficiencies.

Key Features of the Merchandising Tool Box

Comprehensive Program Guide for Sales Consultants A detailed resource to help sales consultants support retailers in implementing category management best practices.

Guide to Space Management

Practical advice on optimizing store layouts to increase product visibility and maximize sales per square foot.

Guide to Packaged Beverages

Focused on high-margin items, offering strategies for placement, pricing, and promotions.

Guides to Priority Categories

In-depth materials covering high-performing categories, including:

- Cigarettes
- Prepaid phone cards
- Cold dispensed beverages
- Hot dispensed beverages

Guide to Top SKUs (Stock Keeping Units)

A curated list of top-selling items by category, ensuring retailers stock the most in-demand products to drive revenue.

Guide to Shelf Labeling Software

Instructions for implementing shelf labeling tools to enhance product organization and improve the shopping experience.

Guide to Equipment

Recommendations for essential equipment, such as display units and refrigeration, tailored to the needs of individual retailers.

Monthly Promotions

A structured calendar of promotions to drive seasonal sales and boost customer engagement.

Guide to Interior Graphics

A design guide for creating impactful in-store visuals that align with Shell's brand standards and enhance the customer experience.