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# STORY TELLING

WHAT'S YOUR ANGLE?

.....



OCTOBER 2014  
THE OFFICIAL MAGAZINE OF THE CONTENT MARKETING INSTITUTE

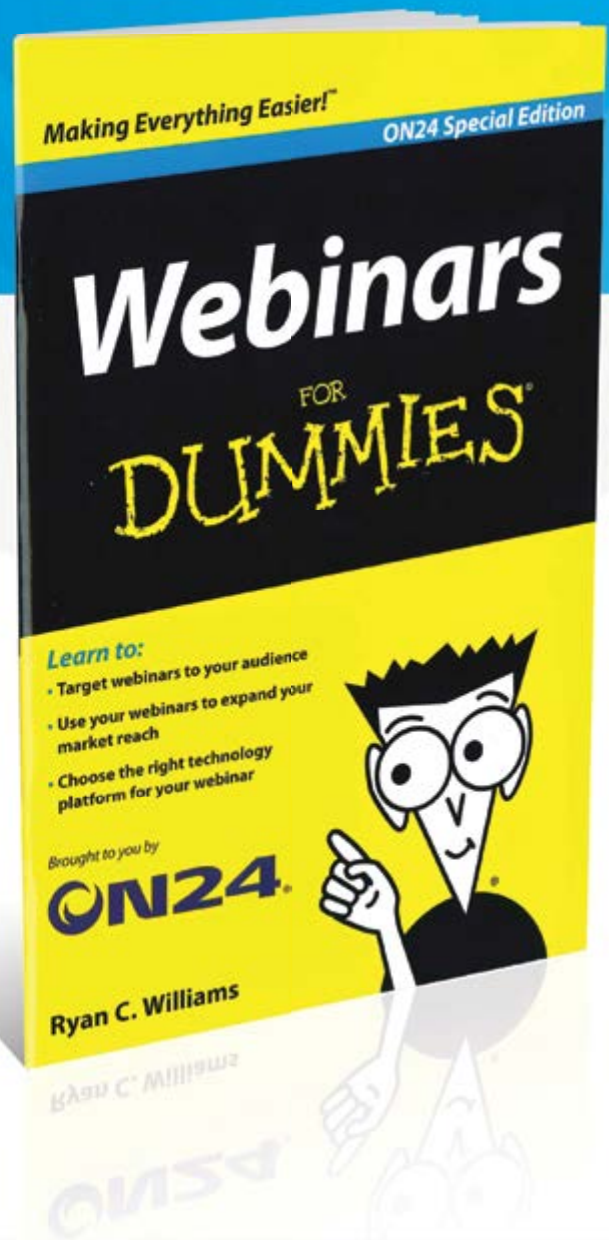
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# The True Future of Content Marketing

Cash-strapped media companies will need high-quality brand content.

It hit me like a ton of bricks.

About a year ago I was doing research for my book, *Epic Content Marketing*, on the valuations of particular media companies. At the time The New York Times had a market cap of just over \$2 billion. It hasn't changed much (as of writing this, it's valued at \$2.14 billion).

Then I started to look at the available cash for a few well-known brands.

According to Bank of America US Trust division, Apple has \$160 billion in cash-on-hand. Microsoft has \$85 billion. (For comparison's sake, the U.S. government has \$49 billion in available cash.)

So, arguably, one of the most prestigious media brands in the world could be bought 80 times over by Apple. It's couch-cushion change for Microsoft.

What does this mean? In our current economic model, there is no possible way media companies can raise the amount of capital needed to compete with non-media brands. When brands start to get serious about content marketing, it's game over.

That doesn't mean media companies will go away. Far from it. (I actually believe we are currently seeing a renaissance in niche publishing.) But it does mean the content that consumers choose on a regular basis will come from companies that aren't asking for advertising or paid content.

Red Bull's solo channel on Apple TV gives us a preview of the future. So does Chipotle's situation comedy, *Farmed and Dangerous*.

But those are just the beginning. I expect the Coca-Colas of the

world will stop sponsoring shows like *American Idol* and simply produce them. I expect the largest business trade shows in the world to be produced by brands (look at Salesforce.com's Dreamforce event). And I expect the majority of "must-see TV" will be produced by brands.

**In our current economic model, there is no possible way media companies can raise the amount of capital needed to compete with non-media brands.**

So what does this mean for you?

Put on your media production hat. Set your sights on becoming the leading content producer for your niche. Stop the content campaigns and tell consistent stories that evolve over time. Focus on delivering amazing experiences to your customers as often as possible through content. Start hiring and working with smart people who understand your audiences, and know how to construct, produce and distribute stories. Begin an internal communications program to senior executives showing the importance of content marketing for the organization.

The path is right in front of you ... and the time is now.



To stay on top of content marketing trends, subscribe to Joe and Robert Rose's weekly podcast, *PNR: This Old Marketing*: <http://bit.ly/PNRThisOldMktg>



**Joe Pulizzi**  
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OCTOBER 2014

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@JoePulizzi

Words can't express how grateful I am for the #CMWorld turnout. Let's hit 5K in 2015!



COVER STORY

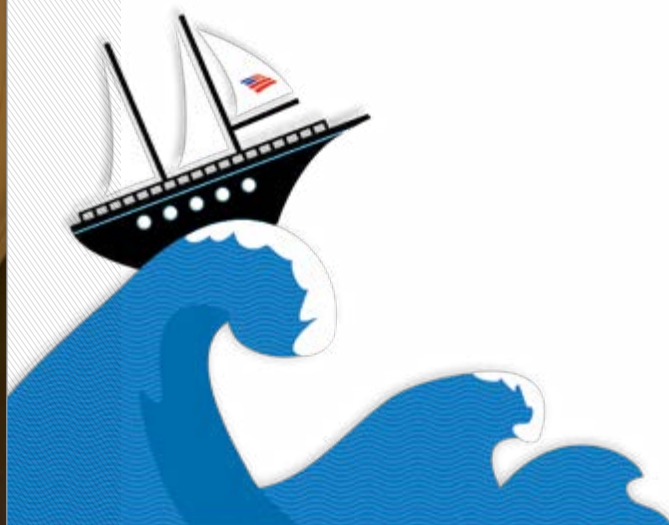
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# STORY TELLING



## WHAT'S YOUR ANGLE?

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### REFLECTIONS ON BRAND STORYTELLING IN THREE PARTS:

**PART 1:**

An interview with  
Caterpillar's Renee  
Richardson.

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archetypes by Intel's  
Bryan Rhoads.

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A reflection on  
crafting a more  
human brand.

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# NO MORE BORING BRANDS

Caterpillar proves even traditional B2B brands can tell fun, captivating stories. We spoke to Renee Richardson—one of our Content Marketer of the Year finalists—about how she and her team breathed new energy into a staid, conservative brand.

Caterpillar's #BuiltforIt video series launched the brand into social media stardom this year. In three quirky videos, Cat® equipment is put through outrageous trials: Operators play an industrial-sized game of Jenga®, rugged Cat smart phones survive being dropped, drowned and run over by a 4.6 ton Cat multi-terrain loader, and a mini excavator navigates a \$45,000 glassware display.

Renee Richardson, global marketing services department manager, spoke with Content Marketing Institute's Robert Rose about how her team pushed a riskier message within an organization more comfortable with quiet humility.

**Robert Rose: Were the #BuiltforIt Trial videos a one-time campaign, or part of an ongoing effort?**

**Renee Richardson:** A little over three years ago we redefined our brand promise to be more customer-focused; we wanted to take the brand on the offense ... so, it was quite intentional.

Like most large organizations, we are very matrixed. We had different business units choosing different taglines, and it was not a good use of our dollars. We knew from benchmarking that going to the market in a fragmented way did not make much sense.

The Built For It™ tagline enabled us to be more consistent with how we present ourselves to the market. So, it all started with that reinvigoration of the brand

promise and the new tagline. We also learned from other companies that you have to direct the message internally first to make sure the employees feel it. So, we started at home before taking it to the market.

We actually did the three videos as a bit of an experiment. We have a lot of extremely creative and capable people inside, and we've also been working with Ogilvy and Mather over the last two years. We met and said, "Let's try to figure out how to do this cost effectively and within my annual budget."

**Did you talk explicitly about using storytelling as a tool to convey the brand?**

The direction I gave the team was to do something cool. It was that simple: "Let's do something cool and a little non-traditional." They felt they had permission to do it.

There had also been a larger narrative at Caterpillar about presenting ourselves as more approachable; we want to get greater exposure not only for the parts and services and solutions we sell, but also for our employment brand. We're growing significantly and we know we've got to attract the best and brightest.

B2B brands don't feel they have permission to be storytellers and have fun, or be emotional. That's what I love so much about this series. It's clearly just meant to make you laugh, make you happy and, in a really clever way, show off the product.

Yes and, oh by the way, we sell tractors.

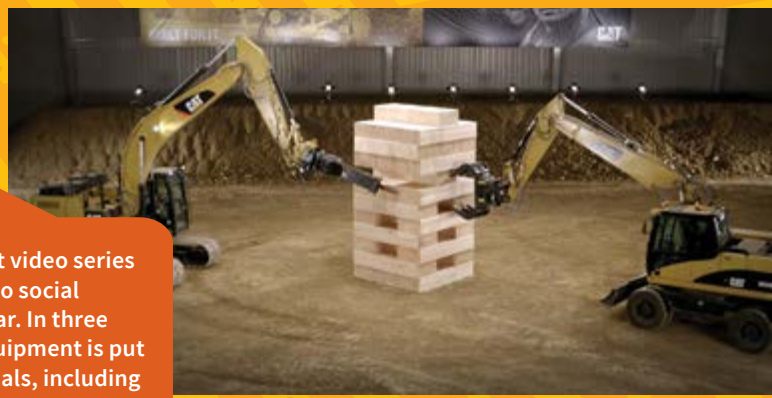


Renee Richardson is global marketing services department manager at Caterpillar and was also a finalist for the Content Marketer of the Year award.





Caterpillar's #BuiltforIt video series launched the brand into social media stardom this year. In three quirky videos, Cat® equipment is put through outrageous trials, including a mini excavator navigating a \$45,000 glassware display.



## Tell me a little bit about the conception process for the videos. Did the agency come back to you with three ideas or did you all sit in a room and brainstorm?

My brand and creative team sat down with Ogilvy and Mather; they brainstormed together and came up with the three concepts. The team then brought it to me and I said, "Let's do it."

I have an extremely creative team and so I have to have faith in their creativity. I let them make the call about which three they thought were best. We tested it quietly because the project was unusual and people might have thought, "Why are you doing that?" It's just not expected from a B2B brand. Sometimes asking permission can be good ... or it can be bad.

## When did you realize, "We've got a hit on our hands?"

You know, we expected that maybe it would hit 200,000 if we were lucky. It was probably after three days when we thought, "Holy smokes; this is fantastic!"

The latest metrics are up to 654 million impressions. It's been really tremendous. And I believe we're just getting warmed up.

## What was the reaction inside Caterpillar?

It was extremely positive, and it established a lot of credibility for our internal resources and capabilities. This is just another validation of our investment in brand awareness over the last three years.

## Was it always the plan to do just three videos or will you tell this story over a longer period of time?

We are evaluating that; we'll see what makes sense. The intention was to do three. Now we are working on our next go-to-market strategy.

We are almost doing the same approach as we do in our e-business development, which is an agile approach with short sprints and experiments. If we fail, we fail fast. Then we learn and we go on to the next thing. Rather than having these huge waterfall projects, we are trying out little things to see how they work, considering each an experiment.

## Was "agile" already part of the Caterpillar culture, or have you had to evangelize the "fail-fast" concept?

I am an evangelist—and the folks in my department are evangelists—because it's been really successful in our

e-business strategy. The challenge has been that everyone is so used to perfection. When you're taking an agile approach, 80 percent has to be good enough. It's continuous improvement over perfection; learn and then improve it. It's been a bit of a cultural change because things are not going to be perfect. You don't have time to make it perfect.

## How does the success affect your longer-term strategy?

It's given us permission to be a heck of a lot more creative than we've been.

We are a long-standing, very traditional and conservative brand. It doesn't come naturally to us to brag about ourselves. The internal culture at Caterpillar is usually team first, individual second.

We're a humble organization, but as marketers you can't be humble.

In the past, we've tended to market very conservatively. These videos were unusual, presenting ourselves as being fun and energetic, but also portraying to our customers the great sense of irony that we have.

We have an incredible product and valuable brand legacy; all the stars are aligned. So we are marketing on our toes instead of on our heels.

## What has been the biggest surprise for you thus far?

I was surprised how the videos tapped into our employees' allegiance to the brand. Employees sent the video out through social media, and to their family and friends. I think it brought a new, revitalized sense of pride in who we are.

Separate from my organization, the work of the Caterpillar Foundation is tremendous as well. They're also telling our story and sharing the impact we are making in our communities. They're talking about, for instance, how if people have access to water, women and girls don't have to stay home to fetch it. They can get an education, and reinvest in the community.

So, in unison, we are all working together on telling our story. I came to work for Caterpillar because I feel like we build the world. I mean it sounds huge, but that's a lot to be proud of.



Want to learn more about Renee and the other Content Marketer of the Year Finalists?  
<http://bit.ly/BrandMktrLessons>

# WHAT'S YOUR STORY?

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\*Source: Nielsen





# EVOLVED STORYTELLING

**CONTENT  
STRATEGIST AND  
HEAD OF INTEL'S  
MEDIA LAB, BRYAN  
RHOADS SAYS  
BRANDS CAN AVOID  
MEDIA MYOPIA  
BY STUDYING  
CLASSIC STORY  
ARCHETYPES**

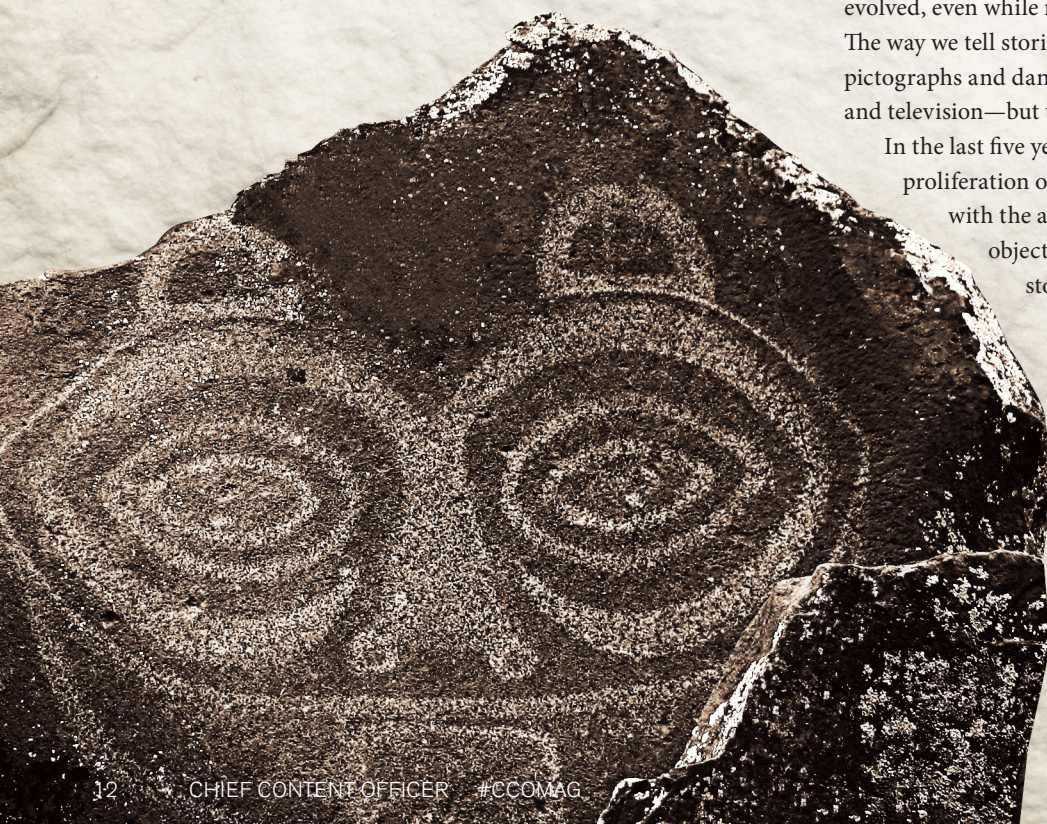
By Bryan Rhoads

She has sat on a cliff-side perch overlooking the Columbia River for millennia, witness to countless seasons, migration of salmon, varying tribes and traders—including the famous passage of Lewis and Clark—and now a modern-day interstate in the distance. ☯☯ *She Who Watches* is a pictograph etched into a large stone above the Columbia River Gorge in Washington state. She tells the story of change, living well, building good houses, permanence and her people's mythology. She symbolizes a local chief (Tsagiglalal in local Chinookan) who fell prey to the deceitful coyote, who turned her to stone so she could watch over her people forever. ☯☯ Storytelling is an ancient skill and universal art. It's central to our evolution as social animals, and how we learn about and make sense of our world. It's how we share our common experience.

## MEDIA EVOLVE

*She Who Watches* is a perfect example of how media has evolved, even while narratives and patterns remain constant. The way we tell stories has changed—from oral traditions, pictographs and dance, to the modern printing press, film and television—but the fundamentals of a good story persist.

In the last five years, we've witnessed a massive proliferation of new media touch points, most recently with the advent of wearables and interconnected objects in the *Internet of Things*. As a storyteller, I take this high rate of change as good news. Some will dread what they perceive as a coming "cyborgization" of our lives with the myriad devices and networks around us, but in fact it's only the logical progression of our social animal. Just as we found a more efficient method than the oral tradition in the Tsagiglalal pictograph, these new tools and devices will soon become as critical to our daily existence as the smart phone is today.





## THE SEVEN STORY ARCHETYPES

A story that relies on a classic archetype offers the audience a relatable backstory, a familiar pattern that tugs at their emotions and taps into our most basic desires as social animals. And brands that tap into these primordial themes differentiate themselves beyond look and feel, and messaging.

In his book, *The Seven Basic Plots*, Christopher Booker summarizes the classic story archetypes:



RAGS TO RICHES



OVERCOMING THE MONSTER



THE QUEST



COMEDY



TRAGEDY



VOYAGE & RETURN



REBIRTH

The real challenge (and the one that will keep marketers employed) will be *good storytelling* across this ever-evolving landscape. Hollywood initially felt this change in the 1960s when the film business confronted an entirely new form: television. Television was initially seen as a threat to film, but those who embraced “transmedia” (the expansion of the film business to become the entertainment business in the 60s) survived and thrived.

### THE HERO'S JOURNEY

Today's media is increasingly multi-screen, participatory, contextual, augmented ... to name just a few new and higher-fidelity touch points. Some touch points will prove to be pure hype, while others will force us to expand our storytelling repertoire and techniques. And adjusting storytelling to new habits, new market demands and new media is not optional.

So what's a marketer to do? Media evolve, but story *patterns are ancient*. Marketers must become familiar with and leverage the classic archetypes.

The hero's journey is possibly the world's oldest story or plot archetype. It's a narrative pattern that's found around the world, and serves as a basis for classic and modern stories alike. It's Luke Skywalker and the Paleolithic drawings from the Caves of Lascaux. It's Homer and *The Matrix*. It offers the audience a relatable backstory, a familiar pattern that tugs at their emotions and taps into our most basic desires as social animals.

### BRANDED STORYTELLING THROUGH SEVEN ARCHETYPES

Brand stories are nothing new. What's new is the challenge to communicate the same narratives across an ever-evolving media landscape (e.g. new devices, multi-screens, changing consumption behaviors, changing demographics, etc.)

Classic archetypes are central to good brand storytelling, regardless of medium.

According to Booker, there are seven basic plot lines to consider:

#### THE QUEST

Similar to the hero's journey, the quest is about progression. A protagonist stumbles across several obstacles or challenges that must be overcome to progress along the journey (and story).

Brands that have differentiated themselves using notion of a quest include: **AXE's** *Make Love Not War* (the eternal quest to get the girl), **Intel's** *Look Inside* and **IBM's** *Smarter Planet*.

My brand, Intel, has been on the quest of late. Take a look at our recent Jack Andraka spot (photo on page 14). Andraka is a high school student who developed an early-detection method for pancreatic cancer—one that is 168 times faster, 400 times more sensitive and 26,000 times less expensive than the medical standard. Andraka's journey began when his uncle is diagnosed with cancer. He is told doctors caught the cancer “too late,” and so he embarks on a quest to develop an early-detection method for pancreatic cancer—and wins the Intel Science and Engineering Fair.

#### OVERCOMING THE MONSTER

From the truly ancient Gilgamesh, to David and Goliath, to



High school student, Jack Andraka, won the Intel Science and Engineering fair based on his early-detection method for pancreatic cancer. See the video:



Chrysler's Born of Fire ad—about the resurrection of Detroit and featuring Eminem—is a classic voyage and return story.

more modern tales like *Avatar* and *Terminator*, overcoming the monster is another common pattern. It's the underdog story in which a hero is confronted by an evil larger than him or herself. To defeat this evil or overcome fear, the protagonist requires great courage and strength to defeat it (the story would be over rather quickly otherwise.)

A brand using this archetype makes the customer the hero (and has the customer join your revolution, such as Apple did with its 1984 video) or the brand becomes the tool or weapon to overcome the monster. Some examples? **California Milk Processing Board's** *Got Milk?*, **Allstate's** *Mayhem* and **Nike's** *Just Do It* campaign.

## RAGS TO RICHES

From pauper to prince, or even the classic pattern of the American Dream, the rags-to-riches archetype is well known. Brands will often leverage their own story or even a founder's story within this theme.

**Paul Mitchell**, the twice-homeless entrepreneur who went on to found the eponymous hair-care company worth \$900 million, is a good example of the brand rags-to-riches trope. The **Oprah** brand and **Wendy's** are two more founder-dependent rags-to-riches stories. **Gatorade** also uses the archetype for its *Rise Up* and *Greatness is Taken* stories.

**Media evolve, but story patterns are ancient. Marketers must become familiar with and leverage the classic archetypes.**

## REBIRTH

*Doctor Who* may be the best modern user of the rebirth archetype. The 50-year-old series relies on a familiar pattern: 1) the hero or heroine is threatened, 2) the threat looms large, 3) the protagonists are imprisoned by the threat, 4) all seems lost, 5) at last, redemption, which often requires an about-face by the hero.

Two brands that use the rebirth theme well are **The Salvation Army's** *Red Kettle* campaign (now 123 years old!) and **Prudential's** *Day One* campaign.

## VOYAGE & RETURN

This is the progression from naïveté to wisdom. *Alice and Wonderland* is the prototypical example; other examples include *Chronicles of Narnia* and *Finding Nemo*. The pattern is similar to the quest, albeit with differences in sequencing.

For brands, the escape metaphor is an oft-used theme. **Corona's** *Find Your Beach* and **Chrysler's** *Imported from Detroit* both typify the voyage and return archetype.

## TRAGEDY

The tragedy archetype—which relies on a tragic flaw, moral weakness and/or deep suffering—is not well suited for brand storytelling and most stay far away from it. The only exception: PSA-type narratives, where a tragic story can bring the audience to action, such as the World No Tobacco Day Vine video from Quit.org.UK.





Prudential's Day One campaign asks people to photograph their first day of retirement/rebirth.



Nike's Just Do It narrative (an example of overcoming the monster) is as relevant today as it was when the brand coined it in 1988.

## COMEDY

Among the most memorable and popular stories are comedies. Characters are thrown into a state of confusion, darkness and bewilderment—and resolution comes when constricting factors have been played to their extremes. While they are an audience favorite, comedies are one of the hardest to execute. There are too many brands to mention in this category ... and you know your favorites.

### THE IMPACT TO CONTENT MARKETERS

For the content marketer, leveraging these archetypes has significant advantages. Many of us struggle to keep content flowing—or more importantly, to keep *good* content flowing. Sticking with a familiar narrative helps clarify what content should, and even more, *should not* be created. And a common narrative ensures your content strategy and point of view are consistent.

Consider the case of Allstate. The company's "overcoming-the-monster" archetype in its *Mayhem* campaign pairs with a solid content offering, from disaster prevention tips to education about financial security. By committing to the monster narrative, the Allstate content team knows what content belongs in its storytelling repertoire and what falls out of scope. And the archetype keeps the brand on message and aligned with a broader integrated campaign across traditional channels.

In my case, *The Creators Project* partnership between Intel & VICE Media uses what we call a "consistent lens."

We create content at the intersection of art and technology, and use multiple archetypes to tell our story (which offers us greater flexibility across Intel's vast offerings). For example, we use the quest archetype when profiling an artist who has overcome challenges through the use of technology, and the rebirth narrative when our protagonist has tapped into previously unexplored artistic abilities and artistic media using new tools.

Archetypes are media agnostic, meaning as you add new touch points to your portfolio of work, you simply multiply the ways you can tell and enrich your narrative. Classic story archetypes are timeless tenets of memorable storytelling—they have largely stayed the same since *She Who Watches* was carved in stone along the Columbia River, and will continue to live on in new forms, new media and new technologies.



Bryan Rhoads runs Intel's Media Lab and leads Intel's global content marketing strategies. Rhoads has defined Intel's approach, voice and mission to social and digital content. He established Intel iQ and manages the award-winning partnership with VICE Media forming the Creators Project.



FINALIST



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# SPEAKING HUMAN

IN THE TRANSITION AWAY  
FROM BULLHORN MARKETING,  
BRANDS STILL STRUGGLE  
TO FIND THEIR STORY AND  
VOICE. DESPITE KNOWING  
BETTER, MARKETERS  
SLAP BRAND MESSAGES  
ACROSS SOCIAL-MEDIA  
PLATFORMS INSTEAD OF  
CREATING REAL CONVERSATION  
AND MEANINGFUL BRAND  
NARRATIVES. CONSIDER

A FEW TIPS ON HOW TO

"SPEAK HUMAN."

Kevin Lund & Eileen Sutton

## SPEAKING HUMAN STARTS WITH...

A handshake moment. If you're working to humanize content, brand voice is a good starting point. Consider a few basic rules of engagement.

**BE CLEAR.** Develop content at eye-level and in plain English. Less jargon, more heart. No marketing speak.

**BE HELPFUL.** Keep the focus on clients to captivate and be memorable. Help audiences think about how you add value to their lives.

**BE CONCISE.** Lean the copy. Then lean again. No frivolous words. Make each idea count.

**BE CONSISTENT.** One voice. One tone. Across all channels.

**M**aybe this is a familiar scenario. You've launched your content-marketing strategy but it's not working—few fans, even fewer followers, some light traffic to your blog and a few lonely clicks from various calls to action. When you listen for the response, you hear nothing but crickets. Why? Perhaps you forgot to leave your bullhorn at the door.

The world over, clients and customers today are demanding more heart. In response, a lot of brands have leapt on the "human" bandwagon. Yet some companies think simply publishing content and proclaiming to customers "you come first" is enough to humanize the brand. Launching an owned-media site or supporting a visually rich Pinterest channel does not make your brand instantly accessible and trustworthy. In too many cases, companies are just wallpapering social-media channels with old brand messages hidden behind the language of "You."

In an age when social media has given audiences so much say about your brand, what does human really mean?

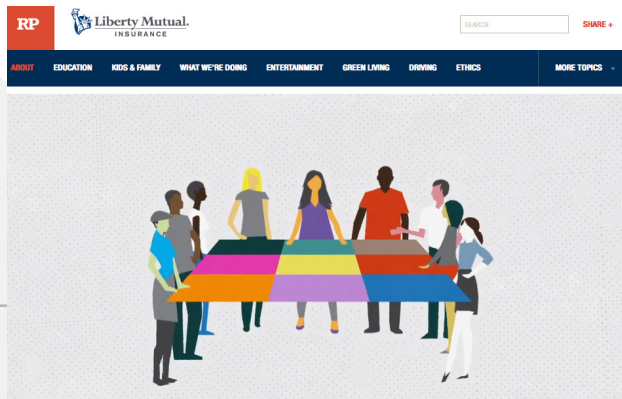
## YOUR HANDSHAKE MOMENT

Let's assume folks know what you do. But do they know who you are?

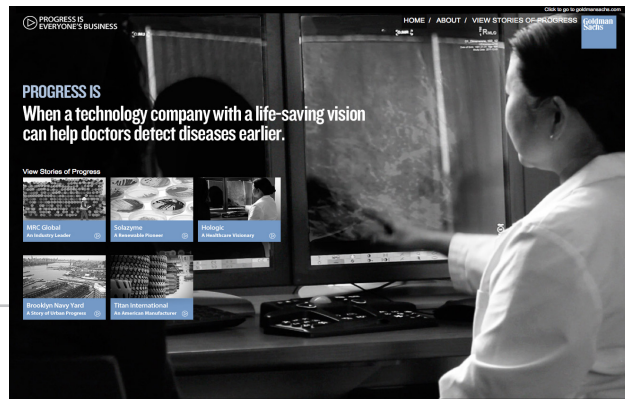
We typically size someone up in the first 30 seconds. We ask ourselves, "Can I trust this person?" "Do I relate?" We look for visual and audio cues—clothes, body language, manner of speaking and more—with the goal of connecting. The same goes for your content-marketing goals. What impression do you make when a person first meets your brand through screens, a retail store or in a magazine? Like a face-to-face encounter, each of your channels is a potential handshake moment. Except you don't have 30 seconds to make a first impression. You have maybe three seconds. How do you want to come across?

In today's world, we talk about products before we buy. Are your clients and customers gossiping about you in the best sense? If not, why not? **Liberty Mutual's** Responsibility Project is a gorgeous eye-level example of how a dry insurance company brought its values to life and gave countless readers a chance to find themselves in stories that are changing the world.

Change must start deep. Brands must tell an authentic story



**Liberty Mutual's Responsibility Project** shows how a dry insurance company brings values to life.



**Goldman Sachs' Progress** videos share stories of rebuilding and revitalizing businesses and communities.

based on corporate DNA. Fake friendly (overseas customer-service reps with dreadful scripts take note) won't pass. Trying to be eye level with your customers—but doing so without a sense of your company's true identity—will ultimately read as cynical and false to a customer base willing to tune out in a heartbeat. Hiding old brand-centric behaviors will flop.

Let's ditch the metrics for a minute. Consider an easy three-step process to get on the "speak-human" bandwagon in a way that resonates with audiences.

## HOW TO SPEAK HUMAN

Today the goal is not bullying but inviting. Not grabbing attention, but earning and holding attention. Naturally you want audiences to take action. But it's the rare brand that understands how content and story must interact to add real value versus merely sell a product or service.

**Be storied.** Storytelling is an essential human activity and must be the cornerstone of any meaningful content strategy. If story is the nest, content becomes the baby starlings that grow strong and fly off carrying compelling messages. Story instantly communicates your history, values, beliefs and more. Unless you have a real story, loyalty is out the window.

**Chipotle's** remarkable Scarecrow video may not be the happiest tale but as pure, storied content marketing it effectively conveys brand values regarding nutrition, animal rights and corporate ethics. To date, the video has received more than 12 million YouTube hits while its game app is a huge success.

**Be humble.** In a word, kill the id and step back. Don't sell products. Sell information, education and inspiration. Don't sell me a camera. Teach me how to take a great picture. You say your brand is great? No one's listening. **Goldman Sachs** got out of the way in its Progress video campaign. As opposed to a dry talking-heads discourse on investment banking, it profiled the companies in which it has invested, and the positive changes those companies made in the world.

**Be relevant.** Mass marketing is last century. Cast too wide a net, and the meaning of your content marketing is lost. If you publish a newsletter for neurosurgeons, don't blog about breakthroughs in orthopedics just because it's also in the medical field.

## SPEAK HUMAN, BE HUMAN

When creating a content-marketing strategy, remember what it felt like when someone last held the door for you. We're all loyal to countless brands. And there's a reason why. Above all, consider how you can be genuinely useful to clients and make their days and lives better. The most well-intentioned strategy is only as good as your last tweet. Remember President Kennedy's famous quote? Let's spin that: ask not what your clients can do for you, but what you can do for your clients.



Kevin Lund is CEO and founder of T3 Custom. Find him at [linkedin.com/in/KevinLund](https://www.linkedin.com/in/KevinLund).  
Eileen Sutton is principal of Sutton Creative. Find her at [linkedin.com/in/eileensutton](https://www.linkedin.com/in/eileensutton).



## TECH TOOLS

SOCIAL INFLUENCERS SHARE THE TOOLS THAT HELP THEM KEEP THEIR EDGE.

# What are your favorite tools for online events, including virtual events, webinars, podcasts or chats?



### ON24

Using the ON24 platform, we created an always-on virtual environment for customers, prospects and partners, as well as a webcast series accessible through the virtual environment.

The seamless integration between

Marketo and ON24 enhances RSi's marketing efforts, and the platform's reporting automatically delivers analytics on audience engagement/behavior.

Using ON24, we have seen an uplift in both registration conversion and attendee conversion rates, as well as improved interaction and engagement. Our audiences remain in hour-long webinars, on average, for an impressive 54 minutes. And we get about 50 percent more questions than we did using a previous tool.

Submitted by **Laurie Speaks,**

**Retail Solutions Inc. (RSI) @listen2speaks**

### TalkPoint

We put on twice-a-year online conferences for more than 1,700 art teachers around the world. The five-hour event includes a live emcee who introduces each 10-minute, pre-recorded presentation video. We also use a live Q&A function. It's essential that our streaming platform is flexible, compatible, and most importantly, reliable. After some difficulties with

other services, we switched to TalkPoint's online conference streaming platform. Customer support is fantastic, streaming is flawless and our attendees couldn't be happier.

Submitted by **Derek Balsley,**

**The Art of Education, @dblasley**



### Adobe Connect

To expand our reach and social impact, GreenBiz Group uses Adobe Connect to blend live and virtual experiences for our professional conferences. We also conduct dozens of forums and webcasts each year to promote our mission. Adobe Connect is a comprehensive solution for delivering integrated, immersive experiences. It also allows us to maximize event attendance and participation, and enable meaningful engagement from mobile devices.

Submitted by **Hugh Byrne, GreenBiz Group, @greenbiztweets**

### Livefyre & ClickWebinar



We post a monthly, industry-related book review, and hold a monthly Q&A session with the authors at noon that same day. These Q&A sessions are facilitated using the Livefyre commenting system. The benefits of being able to literally "live chat"—including tagging and social media mentions—using a simple blog commenting system are immeasurable.

We also use ClickWebinar for our monthly webinars. ClickWebinar provides options for both live, monitored, audience Q&A during the webinar, as well as a live-audience chat stream, that can get quite crazy and fun.

Submitted by **Lindsay Bell Wheele, Arment**

**Dietrich & Spin Sucks blog, @bellindsay**

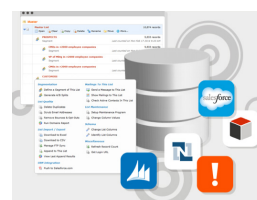


### Act-On

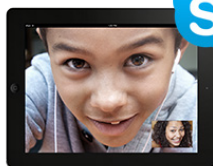
The integration between Act-On and Webex means ASPCA only has to use one system for all webinar planning and communication. Since our e-newsletters are delivered via Act-On's email marketing system, we can seamlessly promote our webinars, set up automatic communications to registrants and track webinar attendance. Then, we can easily keep in touch with our audience about life-saving topics that interest them.

Submitted by **Valerie S. Sheppard, American Society for Prevention**

**fo Cruelty to Animals (ASPCA), @ASPCApr**



### Skype



We use Skype to conduct live interviews with thought leaders in our industry at remote locations around the world in front of audiences of hundreds. Skype is easy to use and ubiquitous enough that it makes communication fast and easy. We also can have lively discussions with more than one speaker at a time. Be

sure to use the most up-to-date version, and recognize that video and screen sharing works really well for person-to-person calls, but less so for multi-user calls.

Submitted by **David Reischer, LegalAdvice.com, @LegalAdvice**



### DEPARTMENT EDITOR



**Ann Gynn** trains others to create successful content marketing or works directly to get the job done on behalf of her clients. Follow her @anngynn or [www.content-marketing-coach.com](http://www.content-marketing-coach.com).

► To submit your **TECH TOOLS** ideas, contact [techtools@contentinstitute.com](mailto:techtools@contentinstitute.com).





# When Social Media Marketers Go Bad...

## Are agencies and experts taking you for a ride?

By Jonathan Crossfield

**T**here are many agencies, consultants and “experts” living off the perception that social media marketing is a complex science, beyond the ken of mere mortals. Their social media strategies are driven by as many graphs, metrics and loosely defined abstract concepts as the client is willing to pay for.

It’s a sleight of hand that creates a lack of genuine accountability. Many clients outsource because they’re convinced they lack the knowledge to manage, let alone measure, their social efforts. This leaves the agency to not only drive the strategy, but also advise on what success or failure looks like. Some even control the tools that measure their own self-serving KPIs, plugging easily achieved numbers into agency-devised equations to calculate (cough) “goals” such as “return on experience” or “brand engagement.”

How about describing the tangible results for the client? You know, numbers contributing to that pesky bottom line the CFO cares so much about.

Don’t misunderstand me. There are many agency

professionals I trust with this stuff far more than myself. And some internal marketing departments can be just as prone to bamboozling their bosses with complexity and gobbledygook.

I’m singling out agencies for this particular rant because they’re supposed to be the trusted niche experts we turn to. So, when some of them take advantage of the hype by overthinking, overcomplicating and overcharging for comparatively mediocre or ineffective tactics, the whole industry suffers the credibility fallout.

### Effort justification and authority bias

I once had a boss who never trusted a recommendation unless it came with a 60-page report full of pie charts, Venn diagrams and lengthy tables. Not that he would read the document: he would also insist on a one-page executive summary.

Inevitably, this led to “analysis paralysis” and flawed decision-making. After crunching every bit of data into smaller and smaller bits to draw increasingly spurious insights, by the 10th meeting no one would be able to assess the information objectively. Yet, once a decision was made, it would be championed long past the point when anyone else would have dropped the idea as an embarrassing failure.

This is a common cognitive error known as effort justification. In his book, *The Art of Thinking Clearly* (it’s wonderful—go buy it!), Rolf Dobelli defines effort justification as, “When you put a lot of energy into a task, you tend to overvalue the result.”

It’s no different when we outsource a task. The more complex the process, the more seemingly arcane the knowledge and greater the effort on display, the more likely we are to believe it is worth the premium price tag. “I could never have done that. I barely understood how they explained it! Thank goodness we called in the experts.”

If the job is made to look too easy, we’re likely to think it isn’t worth outsourcing at all. “Gee, I could have done that.” Unfortunately, there are many scenarios where a task may



only look effortless because of the exceptional skill of the person behind it.

Just to confuse us further, there's authority bias—the tendency to trust even bad advice if the person giving it wears a literal or metaphorical white coat, as psychologist Stanley Milgram famously proved in 1961. His experiment showed that test subjects were willing to administer electric shocks to a person in another room because the person advising them to do so wore a white coat.

Agencies may not wear white coats, but their specialized nature gives them a similar aura of authority that some clients may find hard to question. And the results may turn out to be just as shocking.

Maybe effort justification and authority bias are to blame for why some agencies and consultants can make this whole social media marketing lark look a lot harder than it really should be.

### A whole lotta nothing

Some of you may remember a *Business Insider* article in June 2014 that attempted to reveal the internal workings of a digital agency's social media team. It was widely shared and derided by many marketers for its description of the planning process behind a single campaign tweet.

It wasn't a particularly noteworthy tweet, offering a basic tip about Camembert as part of a wider "Art of Cheese" campaign. It included a graphic, but no link to any other content. And the results quoted weren't going to light up anyone's monthly report—zero retweets and two favorites. Hardly surprising when the client only had 100 Twitter followers at the time.

Yet, according to the article, this cheesy tweet came out of an agency process that took 45 days, numerous meetings, a community manager, project manager, agency strategist, copywriter and graphic designer. And that's before the approval process with the senior creatives.

That must be quite a bill for producing content you and I would probably knock together in a half hour with an Instagram filter and a slug of caffeine.

Of course, as the tweet was part of a wider campaign, the process most likely describes the production of an entire month of content across a number of channels. At least I hope so.

I'm all for editorial calendars to plan themes, synchronize the various content channels and decide when certain updates should happen. That's one meeting I would always defend. But if it takes a committee of highly paid professionals over a month to produce a handful of social media updates (even when batched with other campaign assets), you're definitely overthinking your approach to social media.

## Agencies have an aura of authority that some clients find hard to question.

### Gone in 60 seconds

Never forget that your tweet will only appear in timelines for the most fleeting of moments, before it is pushed down into obscurity by the flood of blog links, sunset photos and trending hashtag banter.

No one's going to pay a moment's extra attention to your tweet just because it took 45 days and a cast of thousands to produce.

Facebook updates may have more time to be noticed, but only if the algorithm (and your Facebook fans) deems it worthy. And judging by some agency-run pages, "worthy" isn't always a word I'd use. "Calculated to justify a worthless KPI" would be more appropriate.

Regardless of what some wizard behind a curtain says, we shouldn't obsess about social media perfection. It's fast, it's rough and it's human. If a typo goes out, the world doesn't end (unless it's inadvertently rude, in which case you'll have record retweets to report).

We also shouldn't obsess over the planning, production, technology and process more than the creativity and simplicity that marks many of the best brand uses of social. It doesn't need the same production value as your print and billboard advertising. You shouldn't pay TV commercial rates for a simple YouTube video.

The awesome marketing strategist Jay Baer once wrote:

*"People who make things more complex than they are either know less than they think, or are trying to sell you something."*

Maybe these consultants are simply responding to the expectations of their major clients. Or maybe hourly rates aren't always the best way to guarantee a fast and efficient result.

Or, as Dobelli reminds us in his book (you really should get it, you know), "Never ask a barber if you need a haircut."



Jonathan Crossfield is an award-winning writer, blogger and journalist. Find him @Kimota.



Read more from Jonathan Crossfield:  
<http://bit.ly/JCrossfield>

A large, bold, white title 'DEEP DIVE' is set against a dark blue background with a subtle, wavy texture. To the left of the title, there is a white silhouette of a person in a diving pose, wearing a mask and fins, swimming downwards. The overall aesthetic is clean and modern, with a focus on the theme of diving into deep waters, which metaphorically represents the article's focus on deep sentiment analysis.

# DEEP DIVE

.....

Technologists are working to improve machine-led sentiment analysis, which helps brands *truly* understand what their customers think. Thoughts from analytics expert, Seth Grimes, on what it means for marketers.

By Erin Rodat-Savla

.....

**W**ith social listening tools now commonplace, plenty of companies keep track of what people say about them online. What they find, however, is there's a big gap between tallying brand mentions and deeply understanding what customers (or potential customers) really think and feel. Most social listening tools can't make sense of subtlety: they can't

make out complex human interactions, such as expressions of irony or playfulness. They still struggle to interpret still and moving pictures. They can't keep up with fast-changing abbreviations and memes.

Advances in machine learning are beginning to help marketers clear these hurdles. Somewhat.

*Continued on page 24*

# BEWITCH INTRIGUE ENGAGE

Tips, trends, and ~~tricks~~ treats to  
enchant your customers.

## THE CUSTOMER EDGE

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In the last few years we have gotten closer to understanding intent. Rather than simply saying someone is positive or negative about our company, we can train machines to recognize more nuanced emotional states (e.g., sad, irritated, angry, elated) and apply these sentiment assessments to specific brands and products. Yet serious limitations still exist. More established techniques still rely heavily on our giving the machine a “dictionary.” Plus they may not scale well to big data volumes. Perhaps most frustrating: to get meaning right, machines must read text that is “well behaved.” Which is another way of saying online content must be spelled correctly, use standard grammar and avoid slang for the computer to keep up.

Does that sound like the language of social and online media to you? And what do you do about tweets, status updates, news articles and reviews in Hindi, Hebrew and Hungarian?

Consider the nature of a lot of social media communication: short text posts without much context, studded with slang, abbreviations and memes, in dozens of languages. Can you keep up? Even if I could give you a dictionary today, it would be largely outdated by ... tomorrow?

The next frontier will be when these systems integrate artificial intelligence—including unsupervised and multi-level deep learning where machines are undaunted by complexity, and keep pace with the subtle and rapid evolution of social chatter by teaching themselves rather than relying on human decoding.

I spoke to Seth Grimes, an analytics consultant with a particular interest in “human data” and founder of the Sentiment Analysis Symposium, about the state of text and sentiment analysis.

### **CCO: Why should brand marketers care about topics that are so much in the realm of data science?**

**Grimes:** Emotions drive actions. Sentiment analysis is about quantifying emotions—including (and especially) unsolicited feelings expressed on social media. Among the biggest challenges is identifying the right data to study.

The number of ways that customers and prospects interact with companies has increased significantly over the last 10 years. Companies have a dozen or more relevant social platforms they’re monitoring, sometimes many more. The first Big Data challenge is to filter. That means not only selecting the platforms and sources that are of greatest importance, but also the information that’s of greatest relevance.

### **How should marketers get started?**

My perception is there are a lot of people out there who say, “They’re talking about us on Twitter and Facebook” and so on, but they don’t understand that a lot of those conversations are not important. They don’t move sales, or influence people to abandon the service, or anything like

that. So, we start by figuring out what data are important to the organization, whether we’re talking textual data or any other type. What drives your business volume, profitability and other measures?

What really interests me, and what I think should interest marketers, is what I’ll call signals, one of which is intent. Intent is critical because it can predict action. For example, “Is this person shopping to buy a product like my product?” “Is this person unhappy and needing some form of attention?” “Is this person about to return the product for a reason that is addressable?”

Sentiment is one intent ingredient. If someone is happy, sad, angry ... that can be determined via sentiment analysis technologies.

### **How refined is our ability to measure sentiment and intent?**

There are a lot of different technologies out there—some of them too crude to be accurate or useful. For instance, when using text analysis technologies—including for sentiment analysis—you may start with a simple word list (i.e., a topical vocabulary). “Good” is a positive thing and “bad” is a negative thing. But don’t stop there. You need at least a bit of language understanding, for instance ability to handle a negator. “Not good” is bad.

Many tools struggle with context. An example I hear over and over again is “thin”: good when you’re talking about electronics, but bad if you’re talking about hotel walls or the feel of hotel sheets. To do sentiment analysis correctly, you need refinement. You need customization for particular industries and business functions.

The market, unfortunately, is polluted with tools that claim to have sentiment abilities, but are too crude to be usable. Even with refinement (e.g., the ability to handle negators and contextual sentiment), approaches that deliver only positive and negative ratings don’t take you very far.

### **Is sentiment analysis strictly for mature marketing organizations?**

There are definitely easy, inexpensive entry points that can meet basic, just-getting-started needs: tools for social listening, survey analysis, customer service (handling contact-center notes, for instance), customer experience (via analysis of online reviews and forums), automated e-mail processing and other needs. These technologies are user friendly, available on-demand, as-a-service. The real question is what the data will actually tell you. At the root of it all, you have to ask: Is the availability of information going to tell you anything that will help you run and optimize your business, or your business processes?



Erin Rodat-Savla is a consultant and facilitator, helping organizations design smart, innovative engagement strategies. Find her @ersavla.



# Companies on the Frontier of Sentiment Analysis

In his own writing, Seth Grimes tracks the latest innovation trends in text and sentiment analysis. His market study, *Text Analytics 2014: User Perspectives on Solutions and Providers*, is a helpful resource. To explore this topic further, check out some of the themes and notable companies on the next frontier.

## DEEP LEARNING TEXT MINING

Facebook, Google, LinkedIn, Pinterest and the like have improved their bench-strength in artificial intelligence and machine learning through key hires and acquisitions. While many advances are still academic (or hidden in these companies' non-disclosed R&D labs), other companies are openly pursuing unsupervised learning for text analysis. They include:

- Digital Reasoning
- Luminoso
- AlchemyAPI

## IMAGE RECOGNITION AND ANALYSIS

Technology can now automatically identify brand labels in pictures. A sampling of companies developing these technologies and the analytics to go with them, include:

- VisualGraph (now owned by Pinterest)
- Curalate
- Piqora (nee Pinfluencer)
- gazeMetrix

## EMOTIONAL ANALYSIS IN IMAGES, AUDIO AND VIDEO

For now, these companies promote emotional analysis of speech and facial expression more for structured studies (e.g., ad or media testing, point-of-sale surveys or monitoring, event feedback) than for ongoing social listening. But as the technology continues to mature, it's easy to imagine that marketers may use them to harvest the unsolicited, unstructured audio and video content of mobile and social data.

- Affectiva - Webcam emotional analysis for media and ad research, including development tools to integrate emotional study in mobile apps
- Emotient - Retail testing emotional analysis for signage, displays, customer service
- EmoVu by Eyeris - Testing the engagement level of both short- and long-form video content
- Beyond Verbal - Studying emotion based on a person's voice in real-time.



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# RISING TO THE TOP

How Bank of America Merrill Lynch gets content to affluent Americans using a content-discovery mindset

By Brad Young

If it's OK with you, let's start with a brief exercise. Visualize for a moment your brand's ideal customer—not the numbers in some Google Doc somewhere but rather the real person. Certainly an image of her (or him) must come to mind. Have the picture? OK. Now think of how she interacts with your product. Where does it meet her in the real world? What needs does it answer? Does it make her smile or make her smarter?

If you're like other brands, you want to know enough about the people in your target market to clearly answer these kinds of questions about your relationship with them. And if you're reading this, you *definitely* want to know enough about how content can help you enhance that relationship.

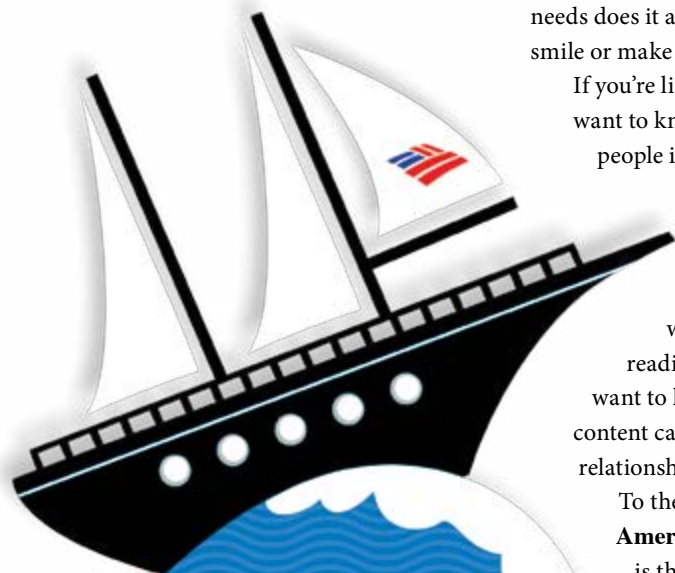
To the marketers at **Bank of America Merrill Lynch**, that is the fundamental core of content marketing. Theirs is the ultimate relationship

business. The company's key value proposition lies in that moment when a Merrill Lynch advisor sits across from an affluent investor who asks, "What should I do?"

"The advisors spend time understanding the clients' goals, their needs, the things on their mind," says Joe Corriero, head of digital marketing for Merrill. "Once they understand what the person is trying to do in life, what they care about, what their priorities are, then they can come up with solutions for them. If you think about that as how it works in the physical world, from a marketing perspective, we try to do the same thing."

But it's one thing to have someone walk into, call or email a Merrill Lynch office looking for help. It's another when they are asking a search engine or a social feed—as they increasingly do. And when they do, Merrill wants to be there with an answer just the same. To achieve this, Corriero and his team partner with John von Brachel, who leads thought leadership and content integration for Bank of America's wealth management businesses.

Yes, they realize content quality and relevance are vital. But as the saying



in content marketing goes, content is king, but distribution is queen, and she wears the pants. As more content has become available to consumers, it can crowd out your brand's stories, videos, infographics or e-books from reaching your target market organically. So like many content execs, Corriero and von Brachel constantly refine the tactics aimed at getting their intellectual capital discovered by their audience—in their case, a challenge made that much more difficult by the fact that they are targeting a highly specialized demographic of affluent Americans with investable assets of between \$250,000 and \$10 million. Here's how they do it.

#### IT'S PERSONAL

"The explosion around content is just crazy," says Edward Kim, co-founder and CEO of **SimpleReach**, which provides brands with insights and algorithms on what content to promote and where to promote it. "Things are heating up so much around distribution right now because people are realizing that the organic side is just not nearly enough to justify the ROI of producing the content."

For the Merrill team, the first step in rising to the top of this ever-swirling content sea is to create hyper-targets that hone in on more specific profiles within that larger investable-asset range. Merrill goes micro by analyzing combinations of age and income and,

most importantly, the financial "keep-you-up-at-night" questions individuals have. "There might be a segment of folks whose concerns for family are top of mind," Corriero says. "Specifically they might be thinking about caring for their aging parents. We dig deeper into the full set of needs where Merrill could add value and go find people online where they are researching or exploring those needs. Getting the right message to them, the right piece of content, at a time when that's what is on their mind is critical. That's even more complicated than just finding your audience."

#### STILL SEARCH

Corriero and von Brachel describe this

Get your  
content recommended  
to 400M monthly  
unique users  
on the web's most  
highly visited sites.

**Taboola**  
Content You May Like.



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





## ○ Even though Merrill currently sees only 10 percent of the traffic to its owned sites coming from mobile, it designs all new content for mobile first.

as “looking for signals,” and first and foremost they rely on an old friend to achieve it. For as much as the digital marketing ecosystem has changed with social, content, programmatic ad buying and mobile, search remains paramount—for Merrill and many other brands. “The easiest way to detect that signal is for them to tell us, and they do that with search,” Corriero says.

That’s not to say search itself isn’t evolving. Here are three key ways it is working well for Merrill now:

First, Merrill is refining SEO and SEM by managing more of it actively as a publisher would, optimizing headlines and imagery in real time to pop effectively.

Second, it is refining search terms beyond simple words like “retirement” and “investing” to meet the personal information needs of someone in a specific life-stage situation. And given the importance of personal referrals in their business, they have started to own search terms for all of their advisors’ names and variations on those names. You or I will ask a friend for a referral of a financial advisor in an offline way, and then we will go research that advisor online, and Merrill wants to provide as much content in that scenario as possible.

Third, Merrill now relies more and more heavily on recommendation engines like **Taboola** and **Outbrain**—which puts Merrill content links alongside other content surfaced via search in “an environment where people are absorbing information based on what they want and are looking for,”

von Brachel says. A long-time Outbrain customer, Merrill recently started using Taboola as well, and beyond the vital factor of a relevant environment, the platforms allow for efficient experimentation with different terms and headlines. “We’ve been seeing amazing interaction rates on both of them,” Corriero says.

### INFLUENCER APPROACH

Not surprisingly, social is another tool for Corriero and von Brachel to identify the signals. They use a mix of paid social campaigns and organic promotion to create a steady drumbeat in social—a strategy focused on targeting individuals rather than boosting certain pieces of content. The Merrill Lynch Clear™ platform and hub houses a wide variety of the needs-based content the company is creating for retirement-minded investors, and answers the variety of questions someone might have as he or she approaches retirement—needs increasingly being addressed by experts across social. Using the example of caring for aging parents that Corriero references above, “we can go out and identify the 200 [Twitter] handles that are most influential in the elder-care space and then we look at all of the millions of followers that follow those 200 handles,” he says. “That’s a pool of people that have raised their hand and said, ‘This is of interest to me.’ We can go after them and target them with our message in those native spaces.” One new format that von Brachel says is seeing good engagement is embedding

longer-form—say, three-minute—videos right into the Twitter feed.

### NATIVE LANGUAGE

When asked if he has been surprised by the success of any particular distribution tactic in Merrill’s content efforts, von Brachel’s answer is forceful. “We’re working with media partners who are much more open to thinking differently about how content plays a role,” he says. “The media companies are getting it in ways that they hadn’t a year and a half ago, and we’re delighted because the ideas are now really rolling in.” Content-driven, in-stream ad environments from publishers offer guaranteed reach, relevant alignment and the credibility that comes from the halo of *The New York Times*, *Atlantic* or *Fortune*. The challenge? Publishers are pricing these opportunities at a high premium. And while more publishers are stepping up, Corriero says there is still a shortage of quality inventory. Due to these limitations, Merrill still mixes display with native to create awareness of the company’s content.

Native is that much more critical on mobile, where search is less reliable and other advertising mechanisms (read: banners) are an annoyance at best. Placing branded content within the content feed fits the form and function of the smart phone and is driving significantly better engagement. “For mobile, we’re just seeing really exceptional performance with in-feed native ads,” says Chris Schreiber, VP of marketing and communications at **ShareThrough**, which works with brands to distribute native ads across 250 publishers. Even though Merrill currently sees only 10 percent of the traffic to its owned sites coming from mobile, it designs all new content for mobile first. They’re not alone in that thinking. As Schreiber points out, feed-



based website design is becoming the standard for desktop as well.

For content discovery and distribution, “we’re still very much in the early days,” says Kim. He believes brands will win by applying the theories and practices that have worked for digital-display advertising as it has evolved over the last two decades. “There’s no reason why you shouldn’t take the sophistication and technology that’s been developed around display,” Kim says, “and figure out how to use all of that to your advantage in your content strategy.”

Is Merrill’s approach working? There’s one final key distribution method that tells von Brachel and Corriero that it is. “We’re hearing a lot of great things from our advisors,”

von Brachel says. The content Merrill uses to answer the online signals (i.e., questions) they see from investors via search, social and native is the same content Merrill provides to advisors in order for them to help their high-net-worth clients.

Online and offline strategies meet again. “We talked about the targeting that gets done technologically through the site, but think about the targeting that gets done through human interaction,” Corriero says. “It’s the same core set of content, not only being curated through our targeting engines, but it’s curated by humans—the advisors who share it with clients and prospects and use it as a tool to share information.

“It all comes back to the way Merrill

Lynch and its advisors do business.

It’s about understanding you, your personality, who you are, the things that matter to you in life and helping you get there. It’s the same approach whether it’s through the Internet or through the advisors.”



**Brad Young** is the global content leader for Dun & Bradstreet. Follow him on Twitter at @byoung07016.



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# Buying Marketing Technology?

## Check Out The Yelp Of Software Reviews

By Clare McDermott

**G**2 Crowd offers crowd-sourced enterprise software reviews. But unlike some review platforms under fire for spam, G2 authenticates each review by connecting members to their LinkedIn profiles.

G2 disrupts a market dominated by big market research firms like Gartner and Forrester because it covers smaller tech startups and highly specialized verticals—something the big research firms can't duplicate cost effectively. And the results of its lengthy surveys (as long as 60 questions) offer extremely thorough, robust information about individual products, as well as aggregated information about how users are deploying and optimizing software.

Perhaps most surprising, you're not required to be a member to view the majority of information on the G2 site, and more than 75,000 visitors use the site each month to read reviews and compare software products. Currently, G2 has more than 15,000 reviews of more than 4,000 products. It raised \$2.3 million in first-round outside financing earlier this year.

We spoke to Tim Handorf, co-founder of G2 Crowd, about the platform as well as trends he sees based on the data they aggregate.

### CCO: What problem are you trying to solve at G2 Crowd?

**Handorf:** Two years ago, my co-founder and I worked at BigMachines (acquired by Oracle in 2013). In our



roles we interacted a lot with analysts; we noticed they would write an opinion about a vendor based on our briefing and input from a few customers. It dawned on us that our user base knew a lot more about the software than the analysts did.

We were also watching the growth of sites like Yelp and TripAdvisor. We thought: You can get a lot more information about a \$100 hotel room than a \$100k software product. We knew we could offer a better service to buyers by allowing them a direct connection to users. And so G2 Crowd was born.

### Besides reviews, how else can users get value from G2?

Once we reach a critical mass of reviews in a category, we write a report and publish a grid on that category. The grid is a two-axis grid that graphs customer satisfaction and market presence. The customer satisfaction rating is based solely on feedback from customer reviews. Market presence is based on publicly available social signals (e.g., size of company, presence in social channels). Many buyers of software use

the grid to establish a short list of vendors to speak with. We have also heard that some companies are using the grid and the user reviews during their due-diligence process prior to making a final selection.

### You're sitting on a big pile of data. Are you noticing anything interesting about how marketers use and review marketing software?

We often find that newer companies are more likely to attract customer reviews. Those companies are always looking for feedback, plus they tend to have customer advocates who are passionate about the product. Some of the older, more traditional companies' customers just won't take the time. They are not passionate enough. It's an interesting phenomenon. (And as a result, we go out and solicit reviews for those vendors.)

We've also noted that the marketing automation software category has one of the highest customer satisfaction ratings relative to other software categories. Also, all sizes of companies are taking advantage of marketing automation software, from startups to large enterprises. Products are not a one size fits all, but there is a solution for everyone in the market.

### We hear frustration from customers about product demos. What are your thoughts on demos?

Buyers want more of a self-service model. In fact, the most popular way for buyers to interact with vendors on our site is to request access to video demos. They don't necessarily want to go to a vendor to get demos anymore; they want to make their own decisions and drive the process themselves.

#### **What information are buyers lacking when making a purchase decision?**

Historically, buying decisions relied on analyst reports and demos. There weren't a lot of reference calls made and buyers didn't see how the product was being used out in the world.

That's the core offering of G2 Crowd: Buyers can find out if others have been successful with a product and how they've used it. They may find customers are enamored with a certain feature—a feature the buyer isn't familiar with or considering. And buyers can also see where others are disappointed or haven't seen a return on investment.



Learn what 12 questions to ask when making a content marketing technology decision:

<http://bit.ly/12QCMTech>

## **How to use G2 Crowd**

### **SHORT-LIST IDENTIFICATION**

Scan the vendors within a single category and review each product's set of features to develop a short list of vendors to study more in depth.

### **ESTABLISH A REQUIREMENTS LIST**

When seeking a new marketing technology product, you may have certain requirements in mind, but in fact products in that category offer much more. Users scan G2 Crowd to develop a list of requirements, and see how others are using products within a category.

### **VALIDATION**

Maybe you've already developed a short list and spoken to vendors, but want to be sure what you're hearing is accurate. It's much better to read blind references from a third party than rely on a curated list of customers from a vendor.

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# Native Advertising Isn't Going Away

By John Federman

**N**ative advertising is here to stay, despite proclamations of its imminent demise. In its most visible form, native advertising is a transient bridge between old-style advertising and the future. It won't go away ... but it will continue to change.

Granted, media and its consumers bear little resemblance to their former selves. Everything has moved online, multitasking is a global epidemic, attention spans are shorter than ever, and mobile is overtaking all other channels. These changes happen faster than the publishing establishment typically has a thought, let alone reacts to them.

And react they have. What emerged as native advertising is just a first baby step into this new

age. These devices—and plenty of other content delineated (well or poorly) as sponsored messaging—have aroused controversy and even the FTC's attention over blurring lines between editorial and advertising.

Native advertising isn't exactly new. It is an evolution of print media's advertorial, adapted to the digital age. As in the print world, ineffective forms of native advertising will be replaced with better, richer, more engaging and transparent forms of sponsored content.

Some branded content will morph into forms that stand well on their own. Some will not, and will continue to rely on media channels as the common meeting place of distinct audiences with overlapping interests. This

A reader responds to “*Why Native Advertising Won't Survive, Regardless of FTC Involvement.*” (CCO, April 2014)

Back in April, Kirk Cheyfitz, co-CEO and chief storyteller of Story Worldwide, took issue with the U.S. Federal Trade Commission's stated intention to “define, pursue, prevent or punish the crimes committed when brands deceptively ‘capitalize on the reputations of publishers’” by publishing native ads.

A misguided and irrelevant effort, Cheyfitz asserted. “Native is a dead end for advertisers and publishers—a passing fad ... [not] the long-sought replacement for dwindling ad revenue.” To target “advertising that resembles editorial” is “an act of self-deception on at least three levels:

1. Publishers can't mislead the public by selling credibility ... they have very little credibility to sell.
2. The FTC is misunderstanding what advertising is ... assuming that advertising and content are different things.
3. The FTC is pretending there is such a thing as non-biased news ... cleanly distinguishable from advertising.”

The article sparked a robust conversation online with CCO and CMI readers. Here, one reader, John Federman, shares his thoughts.

Read the original article by Kirk Cheyfitz.  
<http://bit.ly/NativeFTC>

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Native content will either succeed or fail based on how well it connects with its target audience—not just on how well it racks up clicks or impressions.

partnership between brands and media benefits everyone (media, brands and consumers)—it brings people to the party.

Native content will either succeed or fail based on how well it connects with its target audience—not just on how well it racks up clicks or impressions. If it relies solely on a publisher's merits to get readers diving deeper, it's almost destined to fail, regardless of FTC action, because today's consumers are not suckers. They choose how and when and with what they interact. Without better execution, native is a yawn-inducing business model destined for the advertising archives—because trendsetters like millennials aren't impressed by *The New York Times'* profile of a diet beverage.

Successful native content should encourage this self-selection and intentional interaction. It attracts consumers without trickery, is 100-percent opt-in and encourages viral sharing among social networks. When complemented by gamified mechanics, it transforms content into an interactive experience that extends time spent with a brand while still maintaining total transparency.

Research shows that native ads with smart content, such as rich media like videos and photos, consistently outperform standard ads across all engagement metrics. Not only are ad engagement rates higher, but video completion rates are nearly twice as high in native ads compared to those in standard rich-media ads. And with 79 percent of brands acknowledging

that native ads must clearly be labeled as ad content, it's clear there's little confusion about the bottom line for creating engagement: be honest about what it is and make it interesting so consumers want to, and aren't forced to, engage with the ad in its entirety.

It would be short sighted to view native advertising simply as ads in editorial disguise. Perhaps the FTC and other naysayers should realize that the solution lies not in punishment for blurring the line but rather acknowledging that brands with innovative engagement strategies will grow and thrive, while those depending on fake newspaper articles will fade away of their own accord.



John Federman is chairman and CEO of Dailybreak Media. Follow him @jhfederman.



**Podcast: Will brands destroy native advertising?**  
<http://bit.ly/DestroyNA>



## FACE OFF: BEST GAME OF THRONES PARODY VIDEO



**“Pugs Of Westeros”**

**VS.**



**“A Game Of Social Thrones”**

**T**V streaming service **Blinkbox** created the “Pugs of Westeros” video as a family friendly tribute to **HBO’s** Game of Thrones. The adorable trio of pugs is costumed as the show’s main characters: Jon Snow, Daenerys Targaryen, Ned Stark and Joffrey Baratheon, who is shown sitting on a doggy-sized iron throne constructed for the video shoot.

**O**ne platform to rule them all? **Hootsuite’s** beautifully animated “A Game of Social Thrones” video recreates the opening credits of Game of Thrones using social media networks instead of the show’s imagined lands. The video ends with a call to action to “unite your social kingdoms” using Hootsuite.

► **WINNER:** Both marketing videos are a clever way to join the online conversation about Game of Thrones, but Blinkbox edges out Hootsuite through the power of pugs.

## CONTENT MARKETING MEETS READING RAINBOW

**W**hen you think “enterprise tag management and digital data distribution,” do you think “adorable illustrated children’s book?” We didn’t either, until **Tealium** released “Taming the Digital Marketing Beast,” a children’s story about a little girl and her friends who set out to find the magic of Tealium and restore peace to the land. The book is meant to be a trade show giveaway for attendees to take home and read to their kids, but includes a reference guide for adults, too.



## C’MON, #STARHAPPY

**C**hock full of content designed for social sharing, **Fruit of the Loom’s** Start Happy content hub includes a “Negative Names Positive People” underwear giveaway for people named Nancy, Debbie or Gus; a “Fresh Gigs” underwear giveaway for people starting new jobs; and a “Don’t Sweat It” sweatshirt giveaway for people who’ve broken their phone. The campaign site also features a Father’s Day “GIF registry” of humorous animated GIFs, information about live Fruit of the Loom events, and a call to action to get social with the #starthappy hashtag.



## ONE THOUGHT-PROVOKING BURRITO, COMING RIGHT UP

**N**eed something to read while eating at **Chipotle**? Look down at your cup. Created in partnership with best-selling author Jonathan Safran Foer, Chipotle's "Cultivating Thought" author series features original essays written by prominent writers, actors and comedians including Malcolm Gladwell, Judd Apatow and Toni Morrison. Each of the 10 authors contributed a thought-provoking essay readable in just two minutes. You can also read all of the essays at [cultivatingthought.com](http://cultivatingthought.com).



## TRAVEL WITHOUT LEAVING THE CLASSROOM

**S**tudents in the United Kingdom can now take a field trip without leaving their classroom. Grocery chain **Tesco** has partnered with **Google** for a series of Farm-to-Fork virtual school field trips. Tesco's trips are part of the company's Eat Happy Project, designed to help children have better relationships with food. Students can spend time with a pasta producer in Naples, explore rice paddies in India and visit a strawberry farm in Kent, England. Tesco is the first European brand to use Google's Connected Classrooms platform; in the United States, educators have used the platform to connect students with zookeepers, dog sledders, paleontologists and even NASA astronauts.

## A CAMPAIGN WITH CHUTZPAH

**"F**rogs wrapped in seaweed." "It's like drinking kerosene and antiseptic." "Caveman sweat." If your product's distinctive flavor could be described these ways, you probably wouldn't invite people to share their opinions. But **Laphroaig** did. With its "unique peaty taste," the Scotch whisky has attracted devoted fans who might use "old shoe on a tennis court" and "dusty Band-Aid" to describe the drink—followed by "...and I love it." The campaign's content hub features videos, a user-generated Opinions Gallery, and an invitation to join the conversation on social media using the #opinionswelcome hashtag.



### DEPARTMENT EDITOR

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## Newsfeed Crashers

By Tom Fishburne



Tom Fishburne is Marketoonist and founder of Marketoon Studios. Find him @tomfishburne.



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## Don't Make Me Click. I'm in Email Mode.



Like it or not, **Andrew Davis** doles out content marketing guidance to unsuspecting targets. In this issue, Davis advises media giant **Say Media** to rethink its email marketing tactics.

**Mr. Matt Sanchez**  
CEO + Co-founder  
Say Media

Dear Mr. Sanchez,

I really do want to “Read More ...,” but I can’t bring myself to click that link. Do me a huge favor and just send me the content I signed up for.

I answered your unbelievably smart call to action. The one on your website that says, “Friday is Venn Day. Get it every week!” I typed in my email address at the recommendation of a CMO I respect and over the past year I’ve “made an appointment” with your visually arresting Venn diagrams, agreeing to receive one each week.

Every Friday, at 7:58 a.m., your email arrives in my inbox. Your timing is impeccable. You see ... at that time each week I’m in email mode.

What’s email mode? It’s the time in every busy executive’s life when they’re committed to getting through as many emails as possible, without distraction. When I am in email mode I’m unlikely to click any link that might divert me from the task at hand. I’m actually trying to stay in my email client so I can riffle through the 300-odd emails I receive every single day. Your “Read More...” links are a distraction.

I try my best to stay focused by deleting, delegating or responding to each email as fast as possible. Guess where your great content ends up? Deleted.

I don’t want to delete it. I’d love to read the entire article you’ve sent. But instead of letting me read (and then forward) your great content, you tease me.

Stop teasing me with a great image and the first 100 words of the article. Stop trying to take me out of email mode because my will to get through my overflowing inbox is stronger than your “Read More” link. A lot stronger.

**I’d love to read the entire article you’ve sent. But instead of letting me read (and then forward) your great content, you tease me.**

Wouldn’t you rather I consume and then share the content I signed up for? Why do you want to measure your click-through rate?

Mr. Sanchez, I beg you to stop measuring click-throughs. Instead, shoot for an ever-growing subscriber base and a zero-opt out rate. Isn’t that why you create such great content—so people actually read it.

Here’s the deal: Every Friday, I promise to share your unbelievably thought-provoking content with two CMOs I know, if you start sending me the content instead of the tease. What do you say? Do we have a deal?

Whether you wanted it or not,  
**Andrew Davis**

Andrew Davis is the author of *Brandscaping: Unleashing the Power of Partnerships*. Follow him @TPLDrew.



Read other unsolicited advice and more from Andrew Davis:  
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