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The Pragmatic Marketer™

Volume 5 Issue 4 2007

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Stop Perfuming the Pig: Why "real" marketing is done before the product is created

The Online Media Room:
A terrific place to market directly
to buyers (yes, buyers!)

The Power of the Persona

Customer Affinity:
How to get it,
what to do with it

Viral Marketing? Search Engines? Blogs?

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The NEW RULES of MARKETING & PR
HOW TO USE NEWS RELEASES, BLOGS, PODCASTING, VIRAL MARKETING & ONLINE MEDIA TO REACH BUYERS DIRECTLY
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The Industry Standard for Technology Product Management and Marketing

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The industry standard for technology product management and marketing education, Pragmatic Marketing teaches a practical, market-driven approach to creating and delivering technology products. Founded in 1993, Pragmatic Marketing has trained over 40,000 product management and marketing professionals with more than 90% of alumni indicating the training as essential or very useful to their careers. Visit pragmaticmarketing.com or call (480) 515-1411 for more information.

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Stop Perfuming the Pig:

Why “real” marketing is done **before** the product is created

By Steve Johnson

There's a problem in the industry today…

According to research from executive search firm Spencer Stuart, the average Chief Marketing Officer in a technology company can expect to stay in the job for 23 months.[1] That's half the time we expect for CEOs and COOs. Why is a CMO's job in such jeopardy? Invariably, this short tenure is the result of the CMO's inability to meet unrealistic demands of the job—expectations that are in fact impossible. The CMO fails to create the need for your company's product.

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[1] 2004, Spencer Stuart, Blue Paper CMO tenure: Slowing down the revolving door. http://content.spencerstuart.com/sswebsite/pdf/lib/CMO_brochureU1.pdf

Unfortunately, people don't need what they don't need.

In effect, CMOs have been hired to perfume the pig. Product Marketing is relegated to delivering the product to market without clarity on the problem and who wants to solve it.

Alas, no amount of perfume can overcome the stench of a technology product that people don't need.

•••

Your founder, a brilliant technician, started the company years ago when he quit his day job to market his idea full time. He created a product that he *just knew* other people needed. And he was right. Pretty soon he delivered enough of the product and hired his best friend from college as VP of Sales. And the company grew.

But before long, the VP of Sales complained, "We're an engineering-led company. We need to become customer-driven." And that sounded fine. Except… every new contract seemed to require custom work. And you signed a dozen clients in a dozen market segments. And the latest customer's voice always dominated the product plans. You concluded that "customer-driven" means "driven by the latest customer" and that can't be right.

Later, a board member declared, "We've become a sales-led company. We really need to start being marketing-driven." So you hired a brand specialist away from a consumer company as VP of Marketing. She designed a new corporate logo with a new color scheme, the collateral, and the trade show booth. Everyone got new company icons on their clothing. Except… you spent millions on the logo but without any change in revenues. Apparently, branding isn't all that it's cracked up to be, eh?

The CFO whispered to the founder, "Don't you think it's time that we started controlling costs?" So the company became cost-driven and started cutting all the luxuries of the business, like travel, technical support, bonuses, and awards dinners. And Marketing. The CFO asked, "What do those marketing people do?" and since no one had a good answer, the CFO deleted the marketing budget and fired all the marketing people.

Eventually, the president and founder said, "We've tried being sales-driven; we've tried being marketing-driven; we've tried being cost-driven. It's time to get back to our roots and become engineering-driven again."

Actually, no, that's the wrong conclusion.

Many companies move through this cycle: from being led by Engineering, Sales, Marketing, Finance, and back to Engineering again. We go from technology-driven to customer-driven to brand-driven to cost-driven and back to technology-driven.

Until… someone decides to be market-driven.

The way to break the cycle of dysfunction is to stop listening to *each other* and start listening to the market. Listening to the market means first observing problems in the market and then solving them.

I'm convinced that developers, engineers, and executives want to be market-driven. They just don't want to be driven by marketing departments.

There's a big difference between listening to the *market* and listening to the *marketing department*. The problem is, marketing people don't buy our product. Nor do most of them understand the product. In fact, many marketing people deserve all the respect that they get—which is none.

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I'm not saying that promotion is a waste of time or money or talent. Indeed, I have worked with many fine promotional professionals. But promotions isn't *marketing*; promotion is marketing *communications.*

> "There will always, one can assume, be need for some selling. But the aim of marketing is to make selling superfluous. The aim of marketing is to know and understand the customer so well that the product or service fits him and sells itself."
>
> —*Peter Drucker*

What is marketing anyway?

A Director of Marketing asks me to talk to her management. She tells me that her executives "just don't *get* marketing." Then she starts reminding me about the importance of awareness and "buzz" and exposures… and I realize that I agree with her management: she doesn't "get" marketing either. She's not talking about *marketing*; she's talking about *promotion.*

Marketing directors frequently ask, "What percentage of revenue should I allocate for my marketing budget?"

Do you mean the *marketing* budget or the *promotion* budget? A promotion budget *reflects* the product strategy; the marketing budget *defines* the product strategy. The marketing budget should contain market research; the promotions budget contains marketing research. Which is right?

If you're in maintenance mode and just want to keep your existing customers, a promo budget of 3-5% of revenue is plenty; keep the cash cow alive. But what if you're in a market-share fight? If your strategy is striving for *dominance in the market*, you might spend more in promotions than your entire corporate revenues. In a drag race, you're not interested in optimizing fuel efficiency or ensuring good tread wear on the tires. You are literally *burning through resources* to win the race.

For the first few years, Amazon lost money on every book sold. They were in a drag race for market dominance. Before AOL became a party joke for acquiring Time Warner and then being eaten up by it, AOL spent millions on the ubiquitous install disk everywhere you looked. AOL was in a drag race to be everyone's on-ramp to the internet. AOL and Amazon each spent more on promotions than on development. And each became number one in their space.

So, what is your strategy?

"Uh-oh. We don't seem to have one of those. Can I just budget a percent of revenue?"

Okay here's *an* answer: spend 10% of your revenue target on promotion if you don't have a strategy. (And then seek employment with a company that does have a strategy.)

The real problem facing tech companies (and life sciences and web 2.0 and, okay, well almost everybody) is that they're not doing marketing; they're only doing promotion.

Peter Drucker makes it clear that marketing isn't a product *promotion* strategy; it's a product *definition* strategy, that "marketing" is creating a product that sells itself, creating a product that people want to buy; creating an environment that encourages people to buy.

Over the years however, industries and agencies and marketing experts have worn away the original meaning of marketing and cheapened it. Marketing now means many things to many people but apparently not what Drucker meant. For most people nowadays, marketing means t-shirts, coffee mugs, trinkets, trade show trash, and tchotchkes.

I attend many marketing conferences and invariably find that I'm the only one in attendance who seems to be talking about *products;* everyone else is talking about *promotion.* At one such marketing conference, an attendee in the front row asked every single speaker, "How does what you've talked about generate awareness and leads?" He didn't know what to ask me because I hadn't once used any of the marketing keywords: awareness, leads, campaigns, programs, spin, or buzz. Apparently to him I was a *product* guy and not a *marketing* guy. But promotion isn't marketing.

Sales isn’t marketing

Sales isn’t marketing either. Many people equate marketing with sales. And many salespeople do, too. Some salespeople are so embarrassed by their profession that they’ve taken a new title: marketing rep. Look at the number of business cards that do not reference sales but some other moniker instead. Do you get paid a commission on your personal sales of product? If yes, then you’re a sales rep.

Many believe that salespeople are the best source for product ideas. After all, they’re talking to customers all the time! But talking is the key word. They are *talking* to the customer about the *existing* products, not listening for what products they *should* build. Yes, salespeople are a valuable source of product information but not the only source.

There are two ways of using salespeople in a company: there’s selling and there’s “not their job.” When we invite salespeople for guidance on events or product features, we’re asking them to stop selling and start focusing on “not their job.” Assessing marketing programs or product feature sets or proposed services or pricing are all “not selling” and therefore “not their job.” We invite salespeople to help us because they know more about the market than the people at corporate. But the VP of Sales does not pay salespeople to be strategic. She pays them to sell the product. If salespeople want to be involved in these activities, they should transfer to Product Management; I’m sure there’ll be an opening soon.

In the classic 4P’s (product, promotion, price, place), salespeople are the last P, not the first. We want them to be thinking weeks ahead, not years ahead. We want them selling what is on the price list now, not planning what we ought to have. Selling isn’t marketing; it’s selling.

Instead, we should rely on Product Management to focus on next year and the year after, to be thinking many moves ahead in the roadmap instead of only on the current release.

PR and advertising aren’t marketing either

In the old days, public relations and advertising were the biggest parts of a marketing budget. These two promotions techniques were pretty much the only way back then to reach customers, so PR and advertising became synonymous with marketing. But PR and advertising are promotion techniques. They are two ways—and fairly ineffective ones at that—to communicate the message to the market.

John Wanamaker (considered the father of modern advertising) quipped, “Half the money I spend on advertising is wasted, and the trouble is, I don’t know which half.” Is marketing the same as advertising? Marketing directors and ad agencies apparently think so. So do PR firms. Advertising and PR are the old way of marketing. They’re still trying to get your message in publications that no one reads.

And these same firms are trying to make sense of the new media—video, webinars, podcasts—but with the old mindset. For them, marketing is media, not message.

> “Marketing is too important to be left to the marketing department.”
>
> —*David Packard*

“Marketing” has come to mean “communicating our message.” But who is *defining and delivering* the basis of our message? That is, who is defining the product? Marketing communications is about promoting our message; it’s about “how” to communicate. Where is the “what” to communicate?

The first time I met with an agency was a complete head-trip; it was truly surreal. I felt like I was the only sane person in the room! The agency rep started asking me questions like:

- tell me about your buyer
- tell me what your buyer reads
- tell me what trade shows your buyer attends
- tell me who influences your buyer

In effect, tell me how to *reach* your buyer, how to *promote* your product to the buyer. In some confusion, I asked, “Aren’t you interested in my product?” “Oh no,” he replied. “We don’t need to know the product to define your product message. This is called ‘marketing.’” (Can’t you just imagine the agency guy making little quotes with his fingers when he said “marketing”?)

The old agency approach is based entirely on the “art” of communication. They interview a few execs within the company, find a concept they understand, exaggerate the heck out of it, and that’s the message. Is that “marketing”? No.

Some call it “creative.” I call it “ignorance.”

In another agency experience, I provided a set of personas (profiles of likely buyers and users of the product) and positioning (product message and description). The agency’s creative people were speechless; no client had ever before provided such information. The result was they got to work right away without spending months on concepts, hoping to stumble across one that works.

Marketing is knowing what to build and for whom—and frankly, the rest is easy.

➔

The marketing mix isn’t marketing

Remember Father Guido Sarducci from the first years of Saturday Night Live? He offered a Five Minute College that taught everything that the typical college graduate remembers ten years after leaving college. Economics? “Supply and demand.” Business? “Buy low, sell high.”

Marketing? In my meetings with executives, I ask, “What is marketing?” and I usually get a Father Guido Sarducci answer: “It’s the 4P’s.” But then, the executives can’t remember any of the Ps so they start calling out any words that start with the letter “P.”

What we learned about marketing in college doesn’t seem to apply any longer. We learned the 4P’s or the Marketing Mix. Over the years, people added more and more words that start with the letter P to the marketing mix. People. Pricing. Positioning. Personas. PowerPoint. Prayer.

What’s missing is the Problem.

Problem

The first and most important consideration for any business is the market problem. It’s the problem that drives the product decisions, the message for positioning, and the key elements of selling—the placement strategy. Having identified the problem, the other Ps of the marketing mix become obvious.

Product

The product we build should address a well-understood market problem. What did Drucker say? “The aim of marketing is to know and understand the customer so well that the product or service fits him and sells itself.” That is, the product should come from a deep understanding of the market of customers.

Your company founder understood this, perhaps inadvertently. That is, he created a solution to a problem he encountered in his daily life. He built a product and felt sure that others would value it. And apparently he was right, as your company was an overnight success. But the problem was that the second product wasn’t quite as good as the first and the third was a complete disaster. What happened to the president’s innate understanding of the market? Well, he left the market; he became a president. For the last few years, he’s been more focused on hiring and firing and financing and cash flow and compliance and signage and all the other things that fill a president’s days.

But when was the last time he was in the customer’s chair? When did he last write some code? Balance indexes in a database? Backup a file? What does the president know about the real world any more? And his new hobby is cropping up at work, too. Now that he’s sailing his boat or flying his plane, he wants to include nautical or aviation metaphors into the products and into the promotions.

Engineers tend to be perennial inventors. They’ve always got a great idea of a new feature, a new product, or a new technology. And it’s natural.

In an IEEE paper, Albert Ehrenfried declared, “Too many products are developed to satisfy the desires, urges, and hunches of people within the company, rather than to meet the specific needs of the market external to the company. Products grow out of the desire to tinker, or because an engineer sees a purely technical challenge.”[2]

Sound familiar? Ehrenfried wrote this paper in 1955—over fifty years ago. I guess the technology world hasn’t changed very much after all. Yet one CTO said to me, “Steve, you just don’t understand innovation. We’re solving problems that people *don’t even have*.”

Umm. How’s that working for you?

The best engineers and developers are problem-solvers. If we start the marketing mix with the market problem, inventors can—and will—focus on solving real problems.

PEOPLE. PRICING. POSITIONING. PERSONAS. PO

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[2] Albert D. Ehrenfried, “Market Development—the Neglected Companion of Product Development,” IEEE Western Electronic Show and Convention (WESCON) (San Francisco: August 24-26, 1955).

Promotion

With a problem-solving product in hand, the promotion is fairly straightforward. Just go ask people if they have the problem and then show how you solve it. It’s that easy.

Do you remember the introduction of Hotmail? There was a problem in the industry: it was hard to access your personal email account from within the company firewall and besides, company email wasn’t really confidential so you couldn’t easily send your resume to a potential employer from your current employer’s email account. Hotmail gave you free, private email… and each message you sent to your friends came with your implicit endorsement. Nobody had to generate “buzz” for it; Hotmail became an overnight success because it solved a problem and had the necessary promotion built right into each message. Did they need to create the need? Nope. They didn’t promote the product at all; they just gave it to a few hundred customers who told two friends who told two friends, and so on and so on…

When Google Mail became available, I was fairly unimpressed. Ugh, yet another mail program. And I knew I wouldn’t like a mail program that didn’t have folders! Or so I thought. Once I had a few hundred messages, I realized that folders are irrelevant if you can search quickly. I don’t need folders in Gmail because Google can actually find messages—faster than I can file them into folders. The reason we need folders in Microsoft Outlook is that you can’t find anything using the search tools provided by Microsoft. Happily, you can use Google Desktop Search to find the Outlook messages that Microsoft can’t find.

Build a product that people want to buy and they’ll dig it. The new rules of marketing are basically the same as the old rules of marketing.

Have something to talk about and people will listen.

Place

Have you ever been in Sales? It’s hard to live with your house payment on the line every month. It’s particularly hard when you don’t really believe that your product has value.

Incredibly, many salespeople don’t believe that their product has any value to the client. How sad is that?

The *really* sad part is that many tech products don’t actually have value. They solve problems that people don’t have. Or they solve the problem incompletely. So I guess I understand why salespeople feel they have to sell product futures and make promises that the product can’t keep.

But we can place a fair amount of the blame for our product failures on salespeople themselves. Maybe if they didn’t distract the company with “deal of the day,” the developers could actually finish 100% of the functionality needed by a specific market segment. Yet even if the company has indeed created the ideal product set for a well-defined market segment, the sales team sells the product into another segment. After all, for a sales guy, anyone who calls back is a qualified prospect.

I don’t truly blame the sales guys—they do what they do. I do, however, blame sales management. The VP of Sales (or if not the VP, then the CEO) should reject deals that are not in the segment.

The real problem is this: the company engaged a sales group before they had clarity on the problem they were solving, before they had a complete product, and before they had the promotions in place to support a repeatable sales process. They built an incomplete product and hired salespeople to sell it. They hoped the sales team could generate short-term revenues without interfering with long-term viability and they lost.

Hope is not a strategy.

The truth is that we shouldn’t engage a sales team until we have a repeatable sales process for all the buyer personas in a well-defined market segment. Place is the fourth P, not the first.

Product management is a game of the future. Product managers who know the market identify and quantify problems in a market segment. They assess the risk and the financials so we can run the company like a business. They communicate this knowledge to the departments in the company that need the information so that products and services that actually solve a known market problem are built—so that we can expand our customer base profitably.

Companies fail when they employ marketing without market, when we worry more about promotion than problem, when we focus more on selling than solving. That is, we fail when we deliver products without market knowledge.

TPM

Steve Johnson is an expert in technology product management. He works for Pragmatic Marketing as an instructor for the top-rated courses Practical Product Management and Requirements That Work as well as onsite courses. Contact Steve at sjohnson@PragmaticMarketing.com

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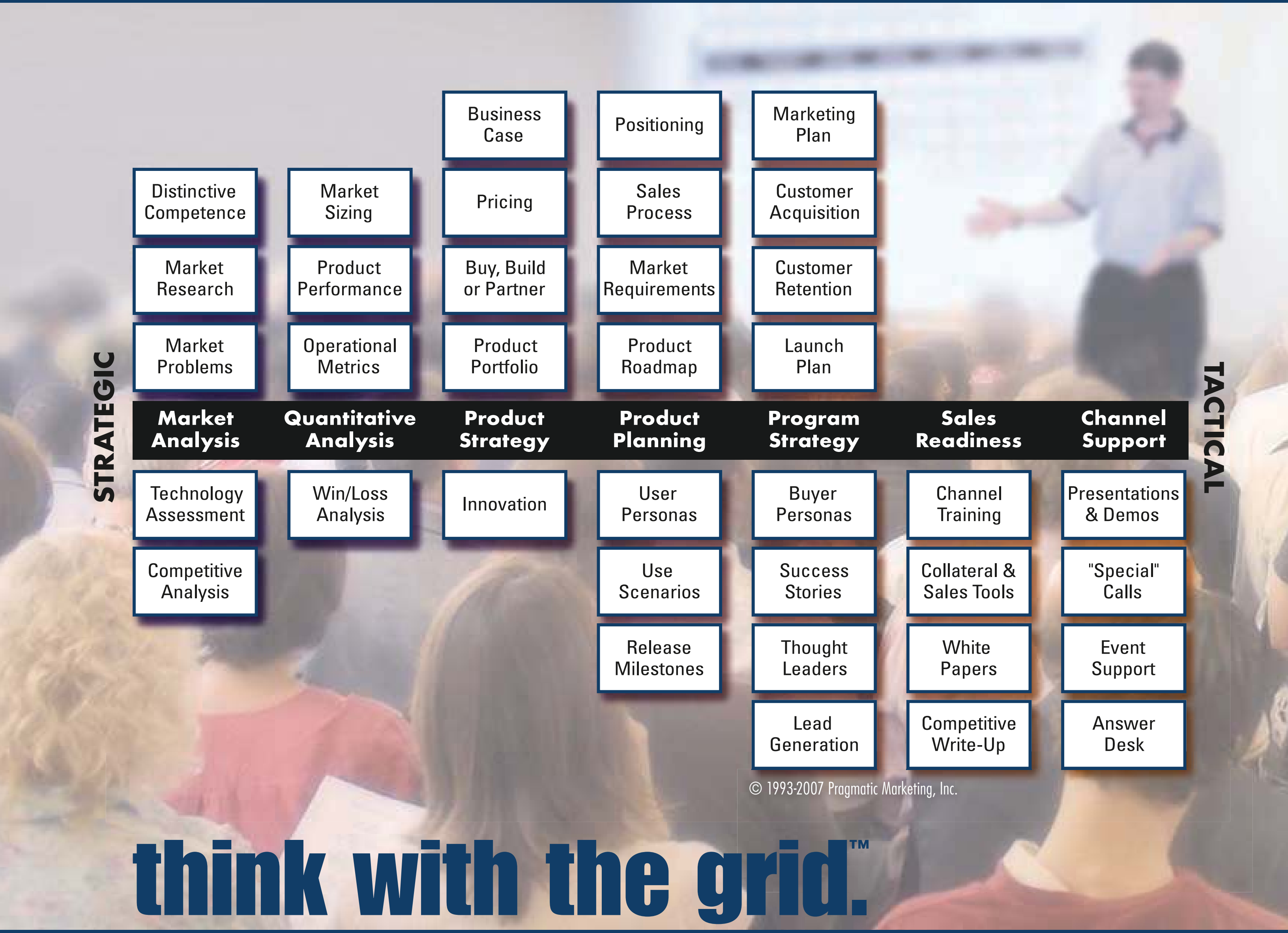

STRATEGIC

		Business Case	Positioning	Marketing Plan		
Distinctive Competence	Market Sizing	Pricing	Sales Process	Customer Acquisition		
Market Research	Product Performance	Buy, Build or Partner	Market Requirements	Customer Retention		
Market Problems	Operational Metrics	Product Portfolio	Product Roadmap	Launch Plan		
Market Analysis	**Quantitative Analysis**	**Product Strategy**	**Product Planning**	**Program Strategy**	**Sales Readiness**	**Channel Support**
Technology Assessment	Win/Loss Analysis	Innovation	User Personas	Buyer Personas	Channel Training	Presentations & Demos
Competitive Analysis			Use Scenarios	Success Stories	Collateral & Sales Tools	"Special" Calls
			Release Milestones	Thought Leaders	White Papers	Event Support
				Lead Generation	Competitive Write-Up	Answer Desk

TACTICAL

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think with the grid.™

The recognized expert in technology product management and marketing, Pragmatic Marketing's common sense approach is built on years of experience and best practices. The Pragmatic Marketing seminars introduce a framework that gives technology marketers the tools necessary to deliver market-driven products that people want to buy. Our framework is the foundation for all our courses, from identifying markets and their problems to writing market requirements to creating a go-to-market strategy that meets your corporate and revenue goals. Since 1993, over 40,000 attendees have been trained to "think with the grid."

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- What is marketing?
- Definition of the role of product management
- Contrasting product management and product marketing
- Assigning ownership of responsibilities
- Identifying the "first steps" with gap analysis

II. Market Analysis
- Distinctive competence
- Market research
- Market problems
- Technology assessment
- Competitive analysis

III. Quantitative Analysis
- Market sizing
- Product performance
- Operational metrics
- Win/loss analysis

IV. Product Strategy
- Business case
- Pricing
- Buy, build, or partner?
- Thought leaders
- Innovation

V. Product Planning
- Positioning
- Sales process

VI. Case Study

VII. Delineating Responsibilities
- Communicating market facts to Development, Marketing Communications, and Sales
- Drawing the line between Product Management and the other departments

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(this is day 3 of Practical Product Management)

VIII. Building the Market Requirements Document (MRD)
- Writing requirements
- Implementing use-case scenarios
- Programming for the "persona"
- Determining product feature sets
- Creating the MRD

IX. Analyzing Business and Technology Drivers
- Reviewing specifications
- Prioritizing the product feature set

X. Getting (and Keeping) Commitments
- Product contract
- Getting the product team in sync
- Getting executive support
- Communicating the plan in the company and in the market

Effective Product Marketing

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I. Roles and Responsibilities
- Differentiate roles of product management and product marketing
- Distinguish sales support from product marketing
- Ensure effective hand-off between Product Management, Marketing, and Sales

II. Segmenting and Targeting Audiences
- Segmented marketing strategies
- Buying criteria and program influences
- Building market messages

III. Building a Strategic Product Marketing Program
- Communicating the business case for product marketing programs
- Supporting sales goals
- Metrics that build management support
- Creating the right marketing budget
- A strategic approach to the marketing program mix

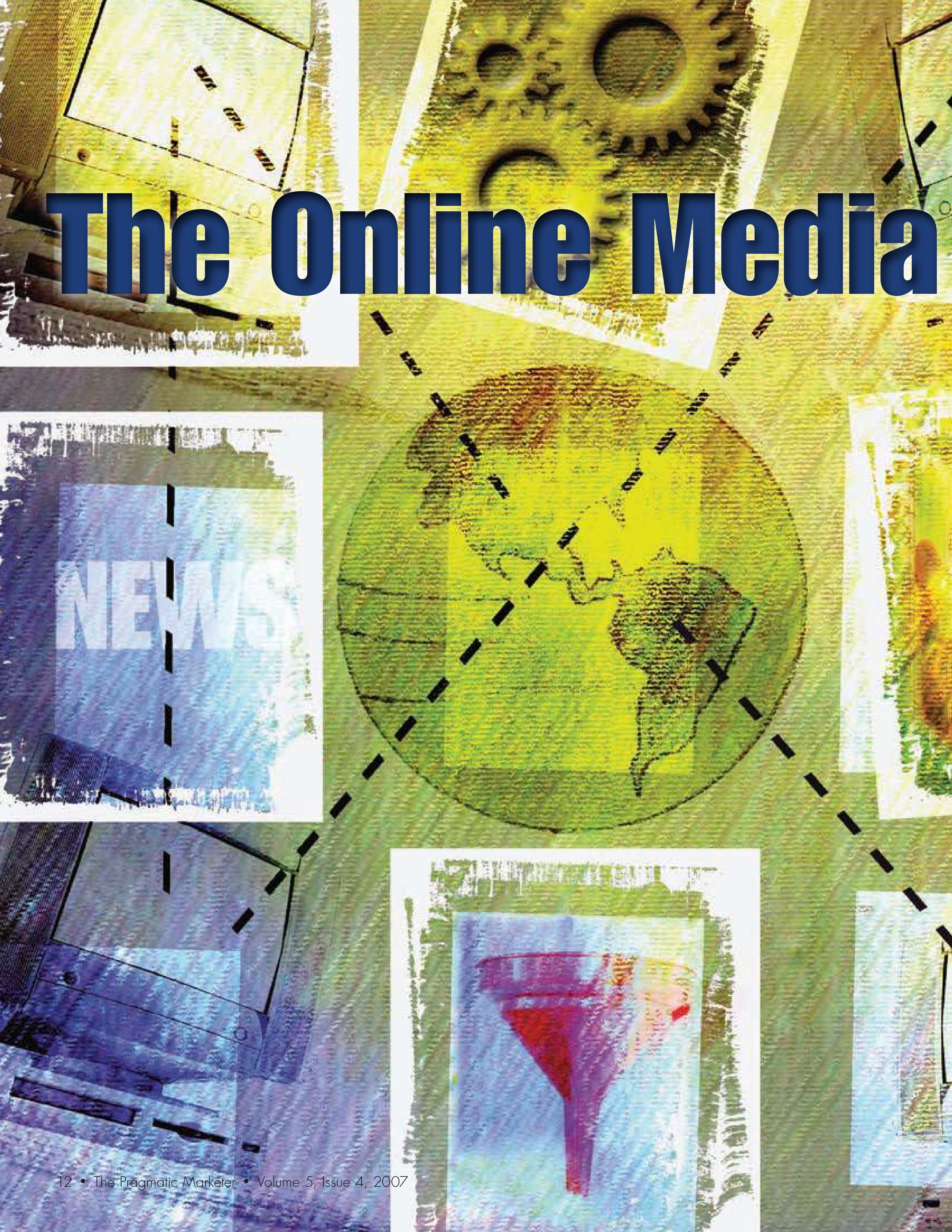
IV. Align with Sales
- Responding to endless tactical requests
- Measuring and improving sales processes/productivity
- Optimizing web content and sales tools
- Working with Sales to sell new products and enter new markets

V. Goal-Oriented Program Execution
- Managing and measuring lead quality and throughput
- Integrating programs by market segment and target audience
- Measuring results with or without CRM
- Influencing customer retention and migration
- Building and measuring positioning awareness

VI. Start Where You Are
- Prioritizing next steps
- Implementing new ideas for current programs
- Continuously measure and improve

Complete seminar agendas are available at www.pragmaticmarketing.com

The Online Media



Room A terrific place to market directly to buyers (yes, buyers!)

By David Meerman Scott

> I want you to consider something that is vitally important:
>
> *all kinds of people visit your online media room, not just journalists.*
>
> Your buyers are snooping around your company by visiting the media pages on your Web site.

The online media room (sometimes called a press room or press page) is the part of a technology company or software company Web site that is created specifically for the media. In some organizations, this page is simply a list of news releases with contact information for the organization's PR person. But many companies have elaborate online media rooms with a great deal of information available in many different formats: audio, video, photos, news releases, background information, financial data, and much more. A close cousin to the online media room is the online Investor Relations room that many public companies maintain.

Before I give you ideas on how to create your own valuable online media room, I want you to consider something that is vitally important: *all kinds of people visit your online media room,* not just journalists. *Your buyers are snooping around your company by visiting the media pages on your Web site.* Stop and really let that soak in for a moment. Your buyers, current customers, partners, investors, suppliers, and employees all visit those pages. Why is that? Based on research I've done (I often speak with people who are responsible for their organizations' online media rooms about visitor statistics), I'm convinced that when people want to know what's *current* about an organization, they go to an online media room first.

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Visitors expect that the main pages of a Web site are basically static (i.e., they do not update often). They expect that the homepage updates a few times a year at best and the inner pages even less. But they also expect that the news releases and media-targeted pages on a site will reveal the very latest about a company. For many companies, the news release section is one of the most frequently visited parts of the Web site. Check out your own Web site statistics; you may be amazed at how many visitors are already reading your online news releases and other media pages.

So I want you to do something that many traditional PR people think is nuts. I want you to design your online media room for your *buyers*. By building a media room that targets buyers, you will not only enhance those pages as a powerful marketing tool, you will also *make a better media site for journalists*. I've reviewed hundreds of online media rooms, and the best ones are built with buyers in mind. This approach may sound a bit radical, but believe me, it works. Give this article to your PR people and tell them you want to transform your online media room as a place to reach buyers directly.

One of the most important considerations for your online media room is to use the words and phrases that your buyers use when they search for answers to their problems that your company solves. When news releases and other content are posted to your online media room, search engine crawlers will find the content, index it, and rank it based on words, phrases, and other factors. Because news release pages update more often than any other part of a typical organization's Web site, search engine algorithms (tuned to pay attention to pages that update frequently) tend to rank news release pages among the highest on your site, driving traffic there first.

An online media room is an important part of any organization's Web site and a critical aspect of an effective media relations strategy. When done well, an online media room will turn journalists who are just browsing into interested writers who will highlight your organization positively in their stories. And more importantly, an online media room can move your buyers into and through the sales process, resulting in more business for your organization and contributing to meeting your organization's *real goals* of revenue and customer retention. I've noticed as I've checked out hundreds of online media rooms that most fail to deliver compelling content. Sure, they may look pretty, but often the design and graphics, not the content that journalists (and your buyers) require, are in the forefront. Here, then, is a list of tips that will help your online media room work as effectively as some of the best ones I've seen such as the Cisco Online Media Room *newsroom.cisco.com* or the Google Online Media Room *google.com/press.*

Best practices for online media rooms

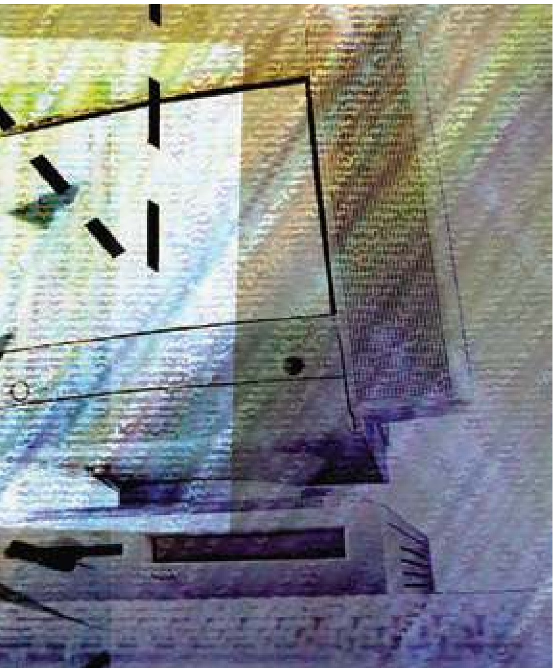
You control the content: One important consideration that many marketing and PR people overlook when considering the benefits of an online media room is that you control the content, not your IT department, Webmaster, or anyone else. The best practice idea here is that you design your online media room as a tool to reach buyers and journalists, and you don't need to take into consideration the rules for posting content that the rest of the organization's site may require. If you build this part of your site using a specialized online media room content management application such as the one offered by The Fuel Team *www.drivetheweb.com* or the MediaRoom product from PR Newswire *www.mediaroom.com* you will control a corner of your organization's Web site that you can update whenever you like using simple tools, and you won't need to request help from anyone in other departments or locations.

Start with a needs analysis: When designing a new online media room (or planning an extensive redesign), start with a needs analysis. Before you just jump right into site aesthetics and the organization of news releases, take time to analyze how the site fits into your larger marketing, PR, and media relations strategy. Carefully consider buyer personas of the people who will visit. Talk with friendly journalists so you can understand what they need.

Optimize your news releases for searching and for browsing: The best online media rooms are built with the understanding that some people need to search for content and others are just browsing. Many people already know what they are looking for—the latest release, perhaps, or the name of the CEO. They need answers to specific questions, and organizations must therefore optimize content so that it can be found, perhaps by including a search engine. The second way that people use content is to be told

something that they do not already know and therefore couldn't think to ask. This is why browseability is also important; it allows buyers to "stumble" across useful information they didn't even know they were looking for. Consider including multiple browsing techniques. For instance, you can create different links to targeted news releases for different buyer personas (maybe by vertical market or some other demographic factor appropriate to your organization). You might also organize releases by product, by geography, or by market served.

Create background information that helps journalists write stories (and buyers to understand your company): You should publish a set of background materials about your organization, sometimes called an online media kit or press kit, in an easy-to-find place in your online media room. This kit should contain a lot of information, basically anything you think journalists might need in order to write about you and your products or services. Company history and timeline, customer case studies, executive biographies, investor profiles, board of advisors or board of directors bios, product and service information, information about analysts who cover your company, and links to recent media coverage will help your media kit save journalists time and tedious effort. This will also help drive buyers into the sales cycle.



Include multimedia content: Innovative communicators make use of non-text content, such as photos, charts, graphs, audio feeds, and video clips, to inform site visitors and the media. Include executive photos, logo images, product photos, and other content that is ready (and pre-approved) to be published or linked to by journalists. You should offer audio and video clips (such as parts of executive speeches or product demonstrations), photos, and logos in such a way that journalists can use them in their written stories as well as on TV and radio shows. Again, you will find that many people besides journalists will access this content, so include appropriate examples for your buyer personas as well as for the media.

Include detailed product specs and other valuable data: Communicators who use online media rooms to offer valuable content are more likely to score the positive story (as well as move buyers into the sales process). However, organizations often shy away from posting much of their best content because they deem it "proprietary." On many sites, even information like detailed product specifications and price lists are available only through a direct connection with a PR or sales contact or a lengthy registration form with approval mechanisms. Yet, this is exactly the sort of content that, if freely available, would help convince journalists to write a story or move buyers into the sales cycle.

List executive appearances, conferences, and tradeshow participation: One of the best ways to positively influence journalists (and buyers!) is to show them that your organization is busy. List all appropriate public speaking appearances, tradeshow and conference participation, and other events in a separate calendar section in your online media room. Make certain to list all appropriate future events, and remember to include any international events. Keep the older listings up for at least a few months after the events to show that you are in demand as experts in your field, but be sure to keep the list up-to-date. Don't forget that even this information is not just for the media. Even if they do not attend industry events, your buyers will see that your company is active and that your executives are in demand as speakers and presenters; this adds to your corporate credibility and your image as an industry leader.

Include calls to action for journalists (and for buyers): It is a great idea to include special offers for the media. Perhaps the simplest thing to offer is an executive interview. But why not include a trial or demonstration offer of some kind, where journalists get to test out your offerings, attend your events, or in some way experience what your organization does? You can even create a landing page specifically for journalists with a registration form and special offers. But you should also have links to landing pages for buyers included in the online media room.

Embrace bloggers as you do traditional journalists: Bloggers, who cover your company, visit your online media room. Encourage them by quickly responding to inquiries, by including bloggers in your news release distribution email list, and by granting them interviews with executives upon request. The fact is that bloggers are influential, and they want to be treated with the same respect as traditional journalists. It's to your advantage to do so.

Avoid jargon, acronyms, and industry-speak: I review more than one hundred news releases in an average week. Some releases are sent directly to me from companies that want me to write about them in a magazine article, an upcoming book I'm writing, or my blog, and others I find by checking out online media rooms. Unfortunately, most online media rooms are chock full of jargon, three-letter acronyms that I don't understand, and other egocentric nonsense. I'm interested in what companies are up to, but I'm just too busy to decipher gobbledygook. If your mother doesn't understand your news, a journalist (or buyer) probably won't either.

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Make the online media room one click from your home page

If you've followed my argument to this point and you agree with me that an online media room is a great place to provide content to your buyers, then a critical component of the strategy is to make your online media room easy to find! For most companies, I suggest that the online media room be just one click from every page including the home page.

Recently, I visited the Microsoft home page looking for the Microsoft online media room. I did not see a link on the home page, but at the time I visited there were no less than 15 links by Microsoft product name on the homepage! Hmm... Do Microsoft customers all know the names of the products and only go to the site with product names in mind? Anyway, there were links for developers, businesses, and IT Professionals but nothing on the homepage for journalists looking for the media pages. Next, I clicked "Latest releases" thinking that it was about press releases, but alas, it was product releases. I then clicked "About Microsoft" which led me to a kind of graphical site map. I'm now several clicks and at least a minute into this hide-and-seek game and I'm seriously wondering if Microsoft forgot about the press section in their recent site redesign. But wait!…There it is!... *For Journalists*. Here's the page I finally reached *microsoft.com/presspass*. Attention Microsoft: Your site may work for other constituents, but you really shouldn't make journalists (and buyers) jump through hoops to find the online media pages.

Really simple marketing: the importance of RSS feeds in your online media room

To provide alternate content routes, many organizations use digital delivery methods, including e-mail newsletters for journalists and bloggers and RSS feeds, as part of their online media rooms; this pushes content directly to the media and other interested people. Smart organizations use RSS (Really Simple Syndication) to easily update prospects, customers, investors, and the media, but too few organizations use this really simple marketing technique to share valuable information.

RSS feeds can (and should) be added to most parts of your Web site. But because they are essentially subscription mechanisms to regularly updated content, many organizations have the RSS subscription page as part of the online media room and use it as a primary way to deliver news release content. Companies such as IBM *ibm.com/ibm/syndication/* and Intel, syndicate information via RSS feeds to reach specific external audiences such as the media, Wall Street analysts, customers, partners, distributors, and resellers. For example, Intel *www.intel.com/intel/rss.htm* offers a suite of feeds that includes Intel Products, Intel Press Room, Intel Investor Relations, Software at Intel, Networking and Communications, Intel Reseller Center, and IT@Intel. It also offers country-specific RSS feeds from Brazil, China, France, Germany, Italy, Japan, Russia, and others. How cool is it that interested people subscribe to just-right corporate information from Intel in the same way that they subscribe to media feeds from major newspaper and magazine sites and those of independent bloggers? This is just another example of how the main currency of online marketing is excellent content delivered in the way that people demand.

The online media room is a place where many people congregate, not just journalists. It is one place on your organization's Web site that *you can control,* without interference, approval processes, and IT support, so it presents a terrific opportunity for marketing and PR people to get content out into the marketplace. On the Web, success equals content. And one of the easiest ways to get content into the market is via an online media room with RSS feeds. TPM

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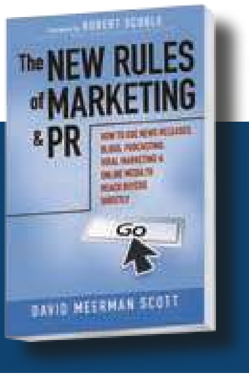
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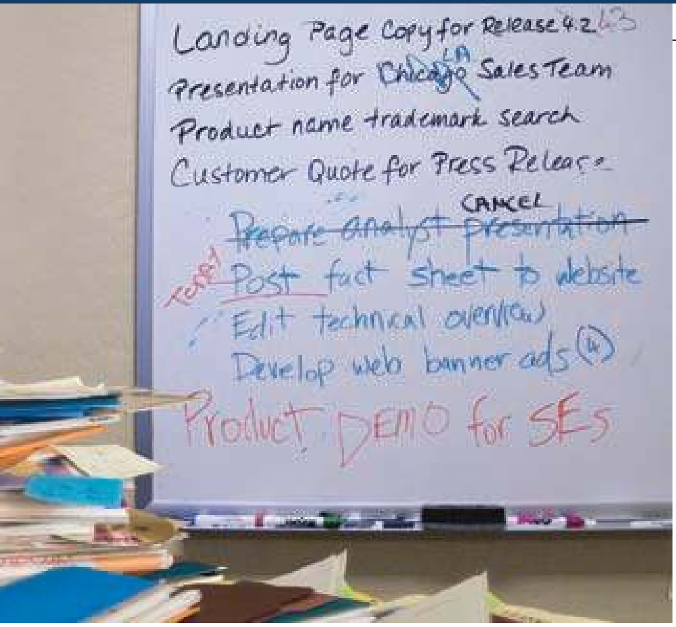
Landing Page Copy for Release 4.2
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The Power of the Persona

By Bonnie Rind

The identification and application of personas improved Development's efficiency and quality during the first development cycle in which they were used. In addition, the use of personas significantly improved corporate cohesiveness, focus and decision making at every level.

In order to protect the company's privacy, the names of the company and its products have been changed.

The lay of the land

I was hired by WhizApp Corp, a well-established company with two major products: DeskTop, a mature desktop business product with a substantial number of devoted users in a variety of fields, and DataMine, a server product newly introduced to harvest the content produced by DeskTop.

WhizApp was in the process of transitioning the DeskTop business from a B2C model to an enterprise sales model. Sales of DeskTop ensured the company was profitable each year and the company's new direct sales team was well compensated for consolidating licenses within an account into an enterprise relationship. Since planned sales of DataMine would dramatically increase DeskTop's already large user base while also raising the value of the content created by DeskTop, DataMine would make WhizApp a strong candidate for acquisition.

Great staff

The people working at WhizApp were top notch. The departments were staffed with hardworking, creative people. The founder of the company, now in the CTO role, continued to be an expert in his domain as well as in high-tech. He directed the products' future with cutting-edge ideas and innovations. The CEO cared deeply for the products and his employees. The Marketing people had years of experience with DeskTop. The highly skilled software developers were experts in DeskTop's subject matter. Overall, the employees were dedicated to the company, the products, and the customers.

Frustrated developers

Most days, product managers spent significant time with the developers in formal meetings or ad-hoc discussions championing, designing and re-scoping features. The developers had strong opinions on what was best for their product, as well as what was possible, so the conversations could get intense. At times, developers expressed frustration that their feature ideas were not reflected in the requirements.

Although the schedule was managed tightly and significant time was spent in design, WhizApp's development projects typically fell behind schedule. Even during crunch times, the developers worked a standard day and went home while managers worked long nights and weekends. In a moment of candor, the go-to programmer on the DeskTop team justified his work schedule: the company always had more work than could reasonably be done and all of it was *always* critical.

When pressured by management to realize too many features, the developers battled back by implementing the features they thought most valuable or most interesting according to *their* best judgment. In a nutshell, the development staff felt frustrated while struggling to:

- Retain their product standards
- Implement the features they felt were most important
- Receive recognition from senior management for their hard work

Competing vision

In fact, there really wasn't a shared vision among the executives for either one of WhizApp's products. The executives regularly debated the value and opportunity represented by DataMine, the best roadmap for DeskTop, the amount to invest in developer dollars for both, and the risk/reward of various product release plans and timelines. The second-level managers also had strong opinions about how to best succeed. As each person lobbied a solution and tilted work just slightly in the direction most representative of that vision, the output of the development, product management and marketing departments became noticeably dissimilar.

Troubling results

DataMine 1.0 had been sent to market with little functionality and an obviously awkward interface. The previous release of DeskTop had been of mediocre quality and was now suffering poor adoption and slow sales as existing users chose to stick with the previous version, and corporations demurred from standardizing on an unstable product. Unfortunately, since DataMine required the newest version of DeskTop in order to function, the overall corporate strategy of selling to enterprise accounts suffered.

Overall, this wonderful company with an established, successful product and another early-stage product (based on a solid concept) was suffering from issues of:

- Conflicted vision
- Roadmap uncertainty
- Poor prior product releases
- Frequent changes to release expectations, plans and schedules
- Developer-chosen features and interfaces
- Dissimilar product-related output from different departments

While I didn't expect personas to be a cure-all for this list, I was confident personas would help Development and Product Management find more common ground and improve overall development execution. ➛

What is a persona?

In theatre, a persona, meaning "mask" in Latin, refers to a role played by an actor. Colloquially, the term is used to describe the social representation we all put on display in daily life. In product management and development, a persona is a detailed representation of an example user.

For our purposes, we create personas, or example users, as tools to represent the needs, desires, skills and environment of one or more classes of *real* users. The terminology we use is as follows:

- The **primary persona** is the primary user of the particular interface or entire product.
- The **secondary persona** is another user of the primary interface, one for whom we will make accommodations so long as the primary persona's experience is not compromised.
- The **negative persona** is the user for whom we explicitly will not add product features or capabilities because to do so will pull our product in a direction we do not want to go.
- The **buyer persona** is the buyer (either an extension of an existing persona or a non-user) whose biases and needs must be addressed in the product and/or the marketing material.

These personas enable us to make appropriate decisions when building and marketing our products.

Getting to know your persona

While a persona isn't a real person, he must feel like a real person to everyone in your company. Therefore, in addition to facts related to his use of the product, we must have basic knowledge about our persona including his:

- Name, age, and education
- Socioeconomic class and socioeconomic desires
- Life or career goals, fears, hopes, and attitudes
- Reasons for using the product
- Needs and expectations of the product
- Intellectual and physical skills that can be applied to the product
- Personal biases about the product or product space

The key to making a useful, valid persona is:

- She must be carefully created during a discovery process that includes interviewing actual users and company employees exposed to the actual users.
- She must be consistent and lifelike.
- She must represent the most useful class of product users.

In other words, the persona must be a well-described, archetype of a user group. You know you have a valid persona identified when you can imagine working alongside him, spending time with her, or encountering him while out shopping. In fact, you'll know you have your persona nailed when you recognize her at a user function.

The power of the persona

Once the company internalizes the personas and how they relate to the product, these personas guide Marketing and Product Management in simplifying and clarifying product documentation such as the product roadmap, requirements documents and marketing material.

By looking at the product and product plan from the personas point of view, communications become more straightforward because:

- Superfluous information and over-specifications can be eliminated
- Features are prioritized according to the persona's values
- Product messaging can focus on the product's value to the buyer persona

Personas are especially powerful for development teams. Once developers get to know these carefully chosen example users, they gain an ability to put themselves in the persona's shoes. This new empathy empowers them to:

- Understand requirements with less detail and specification
- Make good, reasonable implementation decisions independently
- Raise valid concerns and opportunities
- Stay focused on the real requirements and avoid being sidetracked by edge cases
- Feel satisfied they contribute creatively to the product
- Talk amongst themselves and with the rest of the company using the common language of the persona and his needs

Overall, as each employee becomes acquainted with their product's personas, their work reflects that knowledge and the collaborative result is a satisfying product and improved product communications.

Common objections to personas

Most current development methodologies, including Agile and the Rational Unified Process, as well some marketing methodologies, such as Behavioral Marketing, recommend a persona-driven approach. However, people often initially doubt their value.

- Sales and Marketing may be concerned that attempts to build the product for a particular user would limit or bias the product away from the many other fields of use.
- Development and Product Management, especially those already using use cases and scenarios, may object to having more process and more paperwork associated with their jobs.

These common concerns can be allayed. The purpose of the persona is to unite the developers' image of the user on a carefully chosen, realistic example to support their efforts and natural desire to create a product that satisfies the user. An appropriately chosen persona guides the product to address the common needs of the users, *while taking nothing away from any market segment.* A similarly well-chosen buyer persona helps Marketing understand and address the needs and biases of the buyer, again independent of market segment.

While personas are different from use cases and scenarios, they can be used to derive excellent use cases and scenarios or even replace them. By putting themselves in the persona's shoes, product managers and developers can think through the user's needs more realistically and nimbly than before. This empathy *vastly reduces the need for overly detailed documents while also preventing off-target and inconsistent implementations.*

Discovering "the right" personas

Back at WhizApp, I had permission to proceed with the persona discovery. To identify the most useful personas, I first interviewed current, prospective and former users as well as company managers and employees. Just as software development is a combination of art and science, so is persona discovery.

In addition to intuiting the users' needs, skills, desires and environment, choosing the right personas requires an understanding of:

- User interface design (particularly matching interface to user skills and needs)
- Product development and planning processes
- Technology and product development tradeoffs
- Business and sales
- Human psychology

At WhizApp, I learned a great deal from the user base and from company personnel. As anticipated, the personas seemed to have been waiting for us to uncover them. Within a short time, I had a solid description of:

- The primary persona, one secondary persona and one negative persona for DeskTop.
- Two primary personas for DataMine (one was the primary persona for DeskTop) and a rough outline of the buyer persona.

Introducing the personas

Now that I knew the personas, I set about introducing them to a few of the managers. The reception was very positive. Each manager *recognized* the personas. They seemed to have mapped the customers they knew, the demands they heard, and the environments they encountered directly onto the appropriate persona and *they agreed with the descriptions.* In fact, they were excited!

As the personas were more widely introduced, they became enriched with further persona details based on others' experiences with the users. One very powerful contribution, for example, came from the customer support manager. She pointed out that the secondary persona rarely called customer support, preferring to develop more personal—and hence more influential—relationships with the development and marketing staff.

Although that seems like a small detail, this user-initiated difference helped explain how WhizApp personnel had arrived at such differing views of the users' needs. They had talked to different user groups—independent of market segment—and that difference was captured in the personas.

Next, it was time for me to share the personas with the entire Development team. That introduction went smoothly as, once again, the personas were persuasive. The developers immediately realized that many of the user requests they had perceived as contradictory or otherwise confusing, made sense in light of the different personas and their different environments. The developers' only questions were on how best to apply the personas to their work.

➔

HELLO.
MY NAME IS:

A sea of change within the company

Over the next few weeks, each WhizApp department internalized the personas and considered how they could be used to improve the focus of their work. The CTO began communicating the corporate vision and roadmap in the language of the personas. Based on the personas, Product Management quickly understood why DataMine's interface wasn't resonating with users. Development agreed and quickly proposed good solutions. Marketing used the personas to clarify their image of the DeskTop users and adjusted the DataMine messaging to better address the buyer persona's concerns.

Soon, almost everyone in the company spoke, or at least understood, the common language of the personas.

Building better products

The personas were particularly beneficial to Product Management and Development.

- Product managers constantly used the personas to consider feature requests and to communicate the products' values, needs and opportunities.
- Developers incorporated the personas into their daily lexicon and work habits to design and implement features they knew would satisfy users.
- Contention between developers and product managers eased as the groups worked together to synthesize how best to address the personas' needs with the time and technologies available.

Over the course of the next release cycle, the WhizApp product team experienced many valuable persona-related improvements, including:

- Clearer and simpler product requirements, designs, and test plans
- Developer-led implementations that *improved* initial designs
- Better adherence to plan and schedule
- Substantially improved product quality
- Final products that met the initial release goals

Overall, the application of personas at WhizApp led to more agreement of plan and purpose among the company's very capable staff, more productive development cycles, and the delivery of products that met the goals of the release as well as the users' needs and expectations.

Two years later

WhizApp was acquired shortly after the introduction of personas. WhizApp's CTO told me the personas impressed the acquiring company's executives by convincing them that WhizApp knew its users, their needs and how to meet them.

As time goes on, the usefulness of the personas has not dimmed. They remain a primary, critical tool for identifying and communicating feature requirements, designing and implementing those features, and communicating the value and direction of the products over time.

One of the WhizApp development managers recently described the use of personas as a "fantastic cultural phenomena."

When to use personas?

Personas enhance focus, communication and collaboration on any project. As we've seen, you should particularly consider using personas in your company when there are conflicting visions of the product, when you experience difficulties in communication between Product Management, Development, and/or Marketing, or whenever your products seem to be falling short of your users' expectations. TPM

Bonnie Rind is the founder of Bonfire Development Advisors, a consulting firm committed to empowering companies to build products people love. Her 20 year career includes senior positions in firmware development, business and engineering software development, project management, development management and product management. She has helped companies grow from start-up to acquisition and IPO and has managed products and projects for several fortune 500 companies.

Her blog is www.productpersonas.com

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Ask the Expert

Our product team currently has three separate platforms and are about to get several more. While there is some overlap in functionality, and some of the new systems may be redundant, they are ostensibly targeted to solve different needs.

One camp thinks we should merge the platforms to present a consistent face to our clients and provide a more customizable solution controlled by activating or deactivating desired features. The other camp thinks we should pick best in breed to eliminate the redundant systems. Is there any research that validates which approach is best?

With all the mergers and acquisitions that occur, this is a relatively common problem.

I don't know of any article or research that states one approach being better than another.

"It depends"… In fact, you can probably find examples to support either approach as having been successful in a given company. Statistically, I don't know of a study that asks companies to evaluate the success of one approach over another in a way that evenly weighs all factors. Eventually, if you've been in business long enough, you always face the issue of upgrading technology/architecture/platform to acquire new customers even if your old customers are content to stay put.

Rather than focus on the external secondary research supporting one or the other, continue the discussions. Have each camp make the real business case for one over the other. It may end up being a combo effort (invest some resources in the platform for the future while looking at possibly retiring or at least reducing investments on products that are highly redundant or that don't deliver real value to the company and the market). Encourage each camp to look for a third alternative, not just to focus on their bias. What are your growth objectives (growing by new customer acquisition, selling more products and services to the existing customer base, looking for new markets to serve)?

Look at the 4P's we talk about in our Practical Product Management seminar:

Problem

- Is there a market problem you're solving by building a new platform? (How many customers have multiple systems that look and feel different? If they do, what pain is it for them or is it OK?)
- Can you create a competitive advantage by solving problems in a unique, sustainable way by having a new architecture?
- In quantifying the problems to solve, is there really a cost-savings to re-do the platform (once you're done, assuming you pick the right platform, right architecture, right set of tools)? Can you then bring new products to market quicker?

Product

- Which products solve the most compelling of the problems? If you don't have enough resources to support and enhance all products, which ones should you retire? What's the business case for doing that and what impact will it have on customer loyalty and customer retention?
- Do you have the skills to build a new platform? How can you avoid it becoming a science project? (Clue: it also needs product management)
- Are there some technologies within existing products you can leverage into becoming architectural elements or is it better to start with a clean sheet of paper? (Re-use is less sexy; "inventing" new stuff is more fun. Are you over-engineering the architecture over the value it will deliver to you and to your customers?)
- Can you time-phase delivery of the architectural components while adding functionality (or new products) that will allow you to sell into new accounts? How should you split your development resources so you don't completely go dark in new products or new functionality while the underlying platform and architectural development takes place?

Promotion

- If the sales team is having difficulty selling, is it because there isn't clarity about which products solve which problems for which segments? In the short term, can you start by positioning each offering as it is today and then figure out how you want to position each one to target different parts of the market tomorrow?

Place

- Until all of this is sorted out from a development perspective, how can you help Sales beyond positioning the products better? Where are they confused or where are they struggling in the sales process? Provide good positioning to map problems to products with interview questions to help them figure out which product is best suited to solve the problem.
- Do you use the same sales channel for all products? Maybe the sales channels need to be segmented according to product lines and market segments until (or if) you get to "one platform."

In summary, bring facts to the table, not just opinions. Insist on the same for proponents of each side of the argument. Your dilemma is not an easy one to solve, but make sure you all provide thoughtful considerations of what the impacts will be not only to your company, but to the market. TPM

Barbara Nelson is an instructor for Pragmatic Marketing. She has 21 years in the software industry, including VP of Product Marketing for a leading provider of business and accounting applications. Contact Barbara at bnelson@PragmaticMarketing.com

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Customer Affinity:
HOW TO GET IT, WHAT TO DO WITH IT

By Nilofer Merchant

Affinity! That illusive icon in the distance that every company wants to attain. When you have it, you're golden. When you don't, everything's a struggle.

How would you like to be in the recent position of CBS executives, cancelling the drama "Jericho," then receiving 25 tons of peanuts as fans say "nuts" to your decision? Can any company really afford to turn their backs on delighted customers to such an extent that it becomes a news item?

With increased numbers and types of ways to communicate with companies, customers have moved beyond the sedate letter to the president and are instead expressing their feelings in more assertive ways. The "muscle" behind those 25 tons of peanuts is one example. When customers can spread the news about how they feel, they can positively and negatively impact your company and how it is perceived in the broader marketplace. While this is "soft stuff," it's core to any business.

Where does that leave a discussion of customer affinity?

Affinity is that tight bond a customer has with a company and its brand. When a customer has affinity for your company, they're in a long-term relationship with you. Apple has it. ECCO has it. Polo has it. Pentel has it. Coach has it. L.L.Bean has it. Mercedes-Benz had it and is working to gain it back (quality problems). JetBlue had it and lost it (customers held on the tarmac). Natural Balance lost it (harmful pet food).

When affinity is high, the cost to launch a new product goes down. When affinity is low, you have to spend more to overcome negatives and find new customers. It has a bottom line impact in Fred Reichheld's book, *The Ultimate Question,* where he takes affinity to its next logical place of loyalty. He points out that major companies replace half their customers in five years. While some churn is healthy, it's the loss of customers that causes a loss of potential profits.

What's important to know is that every company—small or large—can create affinity, keep it, grow it to loyal users or lose it—faster than a runaway train.

Do you know what form that bond takes for you and your company? Because *that's* the secret sauce of company growth and success.

And like many simple sauces out there, it's got some basic ingredients. Here are a few things I think create customer affinity.

1. Quality

Quality in the components, quality in the final product. "Quality" products do what they are designed to do and create value. In the case of a Bottega Veneta handbag, quality is cumulative. It's the use of vegetable dyes and special tanning methods that cause the leather to be incredibly soft. In the case of *The Wall Street Journal,* quality is an organization and a culture that supports great writers and editors who are required to take the time to develop an idea and look deeply at a story. It's caring enough to make public corrections when there's a question of ethics. It's about developing and maintaining a culture of quality. Here are a few ways to add quality:

Uplevel the product or parts of the product

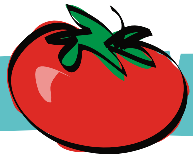
When Levi Strauss developed his original 501 jeans, he added copper rivets. They made the pants stronger and also differentiated them.

Uplevel the process

Toyota allows employees to stop their manufacturing line when there is a problem, encouraging them to both initiate action and take responsibility. Make employees an important part of your process.

Improve the components

An improvement in function, features, durability, strength, weather-resistance, longevity, color, ease-of-use, quietness (machinery), sound quality (audio components), and even ease of disposal (HP Trade-In/Return for Dash/Recycle/Donate program) can make a huge difference in the quality perceived by your customer.



2. Workmanship

The way things are made makes a difference. The difference between a Ford and an Aston Martin is more than just the materials. What is done to and with the materials demonstrates workmanship. Touching a satiny finished piece of wood that is perfectly fitted imparts that sense. The sound of a car door closing firmly does, too. Here are some ways to deliver it to your customers:

Exceptional fit and finish

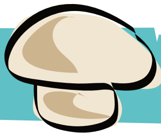
If you've ever looked at a vintage teak Chris-Craft, you've seen skilled workmanship. The curve of the hull, the shine of wood and varnish meeting the water—that's it. In software, it means the UI is intuitive and consistent. Functions are placed logically and learning to use it is quick.

Thoughtful design

The Nokia N95 is an example of a cell phone that encompasses a high level of features and functions along with beautiful design. The Museo Guggenheim Bilbao is another example of great design. Design is more than just something the customer looks at. It is an experience. And as Apple found in their introduction of a phone, they can guarantee a market expectation on great design because their iPod reminds customers about their company, their products and their people every time the customer turns on their MP3 player.

Make it special

With so much mass production today, finding "stuff" to buy isn't difficult. What's difficult is finding that unique item. Something customized: color, size, fit, personalization or even delivery to Timbuktu—a product and a company that combine to provide you with a choice and the unusual.



3. Buying experience

What is it like to buy your product? Is it being sold by a surly teenager, a condescending socialite or a passionate fan? A classic example is the Apple retail store versus the shopping experience to be had at Circuit City. One environment is painstakingly planned and controlled for maximum results—with incredible dollars-per-square-foot productivity. The other is designed for a series of do-it-yourself quantity sales—the equivalent to quickly turning tables in a fast-food restaurant. Recent staff cuts at Circuit City make the analogy even more apt. The price may be about the same, training of employees similar, yet the Apple experience clearly attracts both employees and customers for whom buying experience esthetics are critical. By the way, if lots of discounting comes to mind when you think of the name of the company (particularly if it's a retailer) the buying experience itself is probably discounted. Elegant purchasing experiences are often the result of training and discipline. It may appear that the salesperson at Ferragamo just happened to know the right color to go with your Chanel jacket, but don't believe it. You had a seamless, delightful transaction because there were hours of training and years of experience behind it. At Ferragamo, the quality and workmanship involved in the sales process is equal to that found in the products. Here are some ways you can provide a great buying experience:

Informed sales associates

Trained salespeople—knowledgeable about both the product and customer base—make the difference. If you shortchange the customer here, you're really just hurting your business. Get the best people, and then train them. Make sure the customer gets everything necessary to use what they're buying. If it's software that works with Bluetooth, suggest a device. If it's a leather bag that requires special care, tell them about the leather creme. Better yet, include the one in your hand. →

Physical presentation and design of the experience

This used to be optional. There are now extraordinary expectations about what a customer will see, touch and feel as they walk through a store or an office. At Santana Row in Silicon Valley, designer boutiques communicate their own brand experience within a retail scene that looks like a movie set. Similar rules apply if your customers are shopping online. Design influences us on both an immediate and a subliminal level. When people enjoy an experience, they want to relive it. Use analog and digital design to reinforce your brand and keep customers coming back.

Help

I don't always need help. But when I have a question, I'd like to send an email, chat or call and get an immediate answer. The company that provides me with that level of service tells me they really want my business. Because I expect a person to sell me the product, I'm hopeful that I don't meet up with automated service at the end of my quest for help. Make it easy, simple and always give customers an opportunity to connect more by asking, "Is there anything else we can help you with today?"

4. The post-buying experience

This aspect of purchasing is just as important as everything that leads up to the swipe of your credit card. Consumers want the opportunity to come back and do an exchange or return if the color of the blouse they selected clashes with their boyfriend's favorite magenta Tiki-patterned Hawaiian shirt. It's critical that the customer not be made to feel like a second-class citizen just because they need to have their purchase adjusted instead of purchasing anew. I think sometimes we have the experience after buying something of being a bad, bad customer for not understanding the company's procedures and processes. Dealing with the mobile carriers is a perfect example. Remember, customers have already made a commitment to you by making a purchase. Fail them when they need you to make it right and you've lost a customer—and 20 more when they tell their family, friends and the immediate world via their blog. As the old Texas saying goes, "You got to dance with them what brung you." Show some loyalty to the customers who brought you to this point in your company's evolution—they're the cause of your prosperity. When we give prospects preferential treatment, we're dissing current customers. I have a queue of projects I work on and current client work always trumps talking to new people. Some would argue that's the wrong priority for a rain-maker. But I know that every time I satisfy a customer, I give them a reason to purchase again and also to refer us. I don't have to worry about replacing that customer. I just need to keep the customers who already love the service they're receiving and continuously fulfill the promise of our brand. You can make a great post-buying experience for customers by:

Making a return

OK, not every marriage is forever, not every purchase is forever. Sometimes, we select the shoe that doesn't fit quite right, the custom paint that doesn't match the rest of your walls or the software that just can't be configured to play nice with your system. When that happens, does your customer become a curse-tomer? Fraud aside, most people are fair and don't try to take advantage of companies. Be fair with them, too. Take it back. Smile when you take it back. And say thank you. They'll buy from you again, and they'll tell all their family and friends. Nordstrom has a policy many of you likely know. They'll take anything back. And the idea behind it is this: You've now got a customer in the store with money in their hand. With that, they are not in a competitors' store, and they are more prone to take out their wallet to buy something there.

Service and upgrades

Have a clearly stated service and/or upgrade policy. Make sure it's written in plain language that's easily understood by the customer, not jargon that only a veteran software engineer could figure out. And please, when you're doing a major upgrade, ramp up for it and be able to provide the kind of service *you'd* like to have.

Let them know you still love them

Being a customer means you've bought something. That's past tense. But customers still need to know that you view them as important. Reinforcement is important for all of us. It's how our family and work relationships grow, it keeps our friendships alive. Find ways to stay in contact. Get customer's permission to reach out to them—then do it with offers or information they've told you they want, not spam.

5. The Next Time

The next transaction. Do you remember my name? Do you know what I own—or at least what I've bought from you? Do you recognize me as a current customer vs. an anonymous prospect? From the online experience to direct mail, do you know who I am? I recently gave a $10,000 donation to my alma mater, Santa Clara University, as they design a new business school. It was really because I love what the dean has done in his leadership role that I wanted to give. But here's the thing. I wrote a check. And my husband's name (also an alum, but that's a different story) is listed first on our joint checks. And so now I get letters from the school addressed to my husband, not to me, asking for more money. I figure that I've got to be in a relatively small crowd of people who have given that sum of money. But they can't get my name right. I've repeatedly asked the school to fix it and yet letters continue to arrive with the wrong name. It has made me feel less loyal, less interested in giving. You know why? Because it matters to me that the place I give to knows who I am. And that's what customers fundamentally want to know. They want to know that you remember who they are. It's the equivalent of a local retailer who remembers us and greets us by name when we walk into their store. In today's world, it's online and direct mail but the technology enables us to know who we are addressing and their relationship to us. Pay attention to the details and the customer will know you care. So, here are three more ways to ensure there is a "next time":

Remember them

Keeping records should now be easy as pie. Does your database provide you with information you can act on when a customer makes another purchase? We've got tremendous storage capacity—put it to work on behalf of your customers so that they know you're thinking of them.

Where is your system leaking?

Don't let the goodwill that customers feel for your company drip away. What can you do to provide them service that delights? Can your customers become your advocates? That's just what McDonald's recently did by taking a group of mothers on a kitchen tour. Find customers who are influencers and give them a place to have conversations. Get people interested and talking—provide the forum.

End of life

At some point, your product will be ready for replacement. Develop a system that helps you reach out to your customer before that need occurs. And if it's a product that can be recycled, set up a system that enables you to touch them as they drop off the software, server or computer you originally sold them. As I mentioned, for years HP has been a leader in this kind of effort with their trade-in/return program.

Keeping Affinity

Okay, once you have it, what do you do with it?

Affinity is a step above a customer transaction. A prospect becomes a customer, who then becomes a customer who has affinity for your company and products. Engaging the customer, then, is a key next step to building affinity.

- Consider additional customer needs that are not about a transaction but about adding value. If it is a family who has just purchased security software, you might give them a newsletter on how to keep their child safe online and provide tips from other parents. This shows how much you understand and care.

  In the field of marketing, these efforts are sometimes called Relationship Marketing programs. And in this case, the name works. You must go beyond the customer purchase to establish a connection that builds on what you know about that user—what they care about, what they need.

- Regular two-way communications. Ask for feedback, and let them know what you're up to. Many companies wait until the next release of product to talk to their customers. Instead, send out a blanket email asking for their participation in a survey so you can get some user feedback. Do that once or twice between product cycles and treat their comments with respect. Then, when you announce the new offer/solution/product, you could credit a person in particular who did a great job articulating a new product need. You can say, "Dave, you raised a question and so we built xyz around that." Note what I'm doing here. We are asking for feedback in mass, and we are providing a new product in mass, but the way we're handling things shows an interest in what users care about. Many product managers think "they should know" and while I agree that you have a lot to offer to filter good ideas from bad, why not build a rich set of things to choose from? ➔

- Create occasional delight. Think of one way you could surprise your customers with something they don't expect. We are all used to doing x and getting y—buying a product and getting a service, whatever. But there are those times when a company just does something out of the blue. I remember when Amazon sent me a mug after I spent $2,000 with them one year. A $10 mug counting shipping. But I was delighted. It made me feel like I stood out from the pack and I had more affection for Amazon for "thinking of me." What delight can you plan in your cycle that you never reveal to a customer in advance but that you can drop into the process? In software engineering terms, this used to be a hidden wry joke or image called an "easter egg." It could be something simple like giving research results published for circulation, or a specially branded CD of content the user might like. The thing is that it's not about the expense. It's about the way you show you're paying attention. You only need to do it once and it'll go a long way in letting them know you want them as a customer again. Do it twice in an un-routine way and you have stepped above the fray of other products and companies.
- Encourage word-of-mouth. You know the old saying, "Those who…" Well there's a corollary in the arena of customer love. Those who love, talk. They talk about you to colleagues, friends and online to your prospects. The question is how to support them to do that. Do you give them a forum? Do you ask them questions that inspire them to think about you? Word-of-mouth occurs when your customer genuinely loves what you offer. Cultivate those feelings of love by providing new flavors, different colors, more cool features, and correct price. If you gained your reputation by being first-to-market with the most indestructible power tools, maintain that key attribute in your product line and layer other features onto it. Don't take customers for granted—ensure you've got programs in place for influencers and encourage your best customers with special editions, one-time discounts or unique gifts. Delight must be earned constantly, it's not a one shot thing.
- How you use market power. A company will sometimes try and figure out how to "profit optimize" when they really start to make it. For example, they'll hire lower-quality people so they can cut expenses. Or they'll make processes so repeatable and robotic that the special experience of your product or service is lost. Maybe the zen of the sales process becomes blah or the elimination of a handwritten thank you note makes customers less delighted. One company I know raised their prices by 500% as soon as they gained category leadership. While I commend that at some level, such moves have to be balanced to retain customer affinity. What's my method? Rubicon throws a thought leadership dinner with smart people who enjoy the industry and trading insights. The first seats always go to clients because it's my way of saying thank you for believing in us, co-creating with us and supporting us. Without them, we wouldn't be in a position of market authority. Make sure you use the power you accumulate along the way to celebrate the people who've helped you get where you are. They'll remember, they'll have more affinity for you and in the end you and your company can become more successful by riding a tide of good will.

This article could have been titled *"Customer love: How to earn it, how to keep it."* But that's not the right goal.

Affinity is different than love.

It's more practical, more rational. Pragmatic marketers seek to create more preference, more loyalty over time to generate profits and growth. TPM

Nilofer Merchant is an advisor, writer, conference speaker and the CEO and founder of Rubicon Consulting, a strategy and marketing consultancy designed specifically for the needs of tech companies. She and her team of principals and staff have launched nearly 100 products, created five developer platforms, designed 18 channel vendor programs, run numerous user influencer marketing initiatives and defined more than 30 new markets. To contact Nilofer, visit her blog, www.winmarkets.com or email her at nilofer@rubiconconsulting.com

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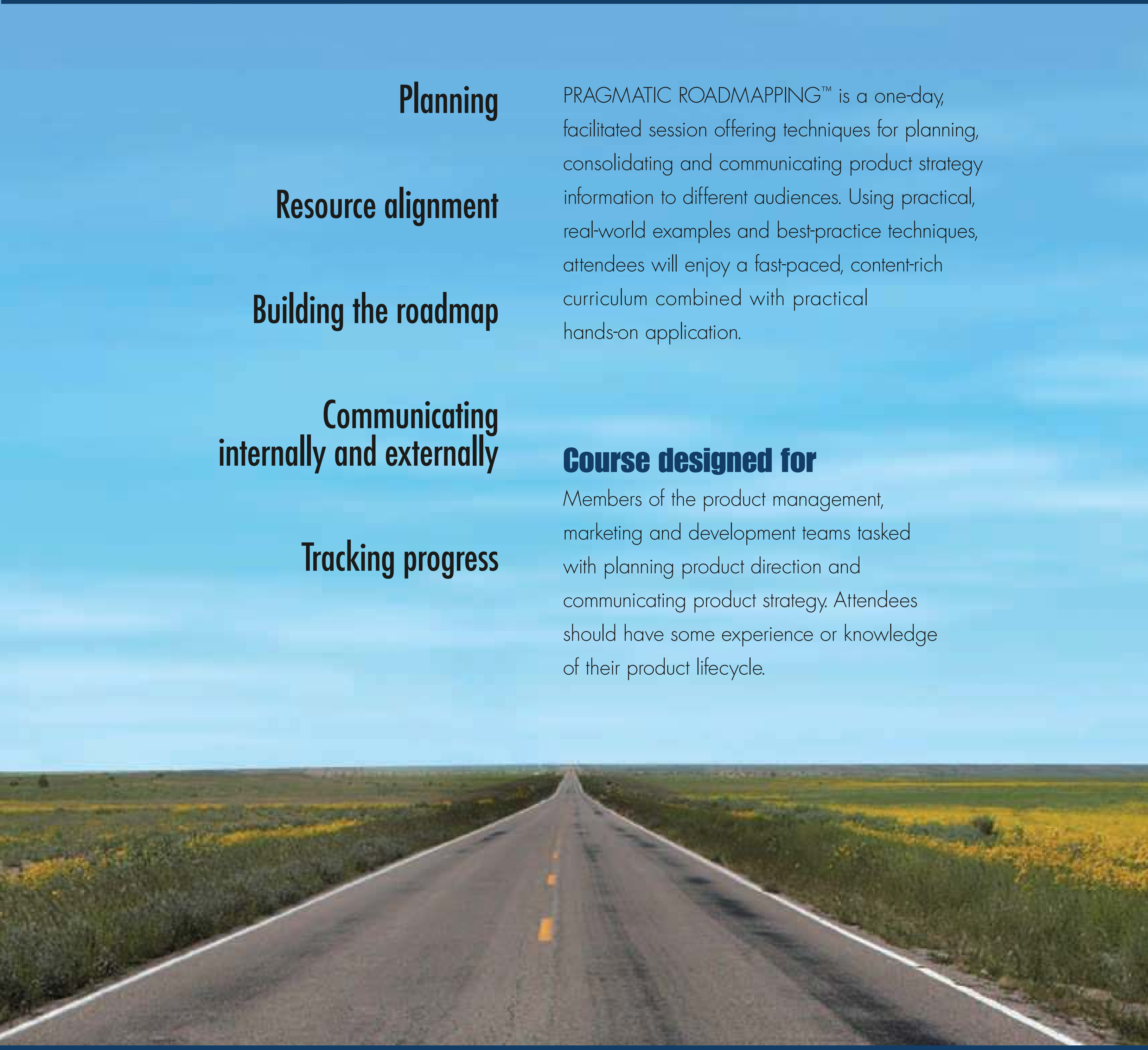

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