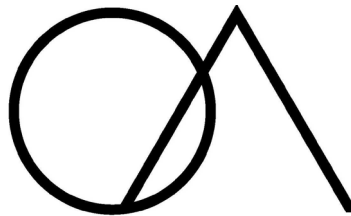


# **Marketing a Technology Organization *in the Digital Age***

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**Fillable PDF**



*Unleashing the Power of IT  
by Developing the Human Side of Technology  
and Changing the Conversation About Strategy, Culture and Talent*



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Version 2020.VILT

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# Introduction

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## Workshop Goals

At the end of this workshop, you'll be able to:

- ◆ Leverage the power of Hallway Marketing
- ◆ Distinguish features from benefits
- ◆ Use interest-creating language
- ◆ Deliver an elevator pitch
- ◆ Harness the power of branding
- ◆ Create personal and team IT value statements
- ◆ Create a draft marketing plan

## Workshop Agenda

- ◆ Introduction
  - Goals & Agenda
  - Introduction Activity
- ◆ Communicating the Value
  - Creating Awareness & Branding
  - Creating IT or Team Value Statements
  - Accomplishments & Value Activity
  - The Elevator Pitch
  - Individual Value Statement/Elevator Pitch Activity
- ◆ Focusing Your Efforts
  - Client & Target Market Profiling
  - Demographics & Client Profile Activity
  - Attention-Getting Communication
- ◆ Becoming an Ambassador
  - Hallway Marketing
  - WIIFMs - Personal & Business
  - Features & Benefits
  - Benefit Statement Activities
- ◆ Creating a Marketing Plan
  - Establish the Focus
  - Define the Audience
  - Identify the Goal
  - Tailor the Message
  - Partner for Impact
  - Adapt the Delivery
  - Evaluate the Result
- ◆ Wrap Up
  - Action Planning

## About Ouellette & Associates

# Moving IT Up The Maturity Curve



## Introduction Activity



At your table, discuss the following:

1. How does marketing benefit IT?

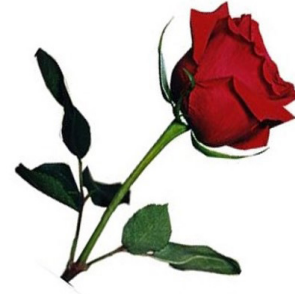
# Introduction

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## What Is Marketing?

### ◆ Creating an awareness of the Value

- Communicating Benefits
- Managing Expectations
- Education
- Marketing



### ◆ Branding

- Not just Logos & Slogans
- Attracting the Best Talent
  - ✓ Personal Branding
  - ✓ IT Branding
  - ✓ Company Branding
  - ✓ Regional Branding



## Why Marketing Matters

### ◆ The Communication Challenge

- More information to communicate
- Digital disruption cycle is now less than 3 years
- The speed of business is accelerating - “fast” followers are too slow
- More channels to consider
- Limited windows of opportunity

### ◆ Flooded with Data

- Attention span
- # of messages
- Old techniques don't work!

Notes

A large, empty rectangular box with a thin black border, intended for taking notes. It occupies most of the page below the 'Notes' header.

## Marketing Will Help You Answer...

- ◆ What benefits does your team provide?
  
- ◆ What evidence shows that these benefits are real?
  
  
  
  
  
  
  
  
  
  
- ◆ What will your clients gain?
  
- ◆ What will they avoid losing?
  
  
  
  
  
  
  
  
  
  
- ◆ What business challenges does your solution address?
  
  
  
  
  
  
  
  
  
  
- ◆ What constitutes “value” in their minds?
  
  
  
  
  
  
  
  
  
  
- ◆ What makes your team unique?

# Communicating the Value

## Establishing an IT or Team Value Profile

### ◆ Build a value profile



- Clear, concise, client-focused introduction
- Background
- Past experience
- Abilities
- Organizational connections

### ◆ Client's needs

### ◆ Client's view of value

### ◆ The solution's benefits

### ◆ Logical and specific

### ◆ Tangible results

# Communicating the Value

## Accomplishments & Value Activity



Accomplishments	Value

# Communicating the Value

## The Elevator Pitch

- ◆ 15-30 seconds
- ◆ Consistent messages about IT
  - Positive
  - Avoid jargon
- ◆ Specific messages that tie your work to business impact
- ◆ Information about you:
  - Why do I care?
  - Why would I talk to you again?
  - What should I know about you?
- ◆ Information about me:
  - What is your knowledge about me and my business?
  - WIIFM to work with you?
  - What qualifies you to talk to me?
- ◆ Update regularly



## Value Statement Activity



At your table, discuss the following:

Elevator Pitch:

# Focusing Your Efforts

---

## Demographics & Client Profile

To support the creation of new revenue-generation projects, CIOs are learning about customer needs, creating teams focused on innovation and creating business case scenarios with defined costs and benefits

- 2019 State of the CIO Survey

### ◆ Client Profiling

- Prepare for the conversations
- Know what's important to the client
- Decide which communication techniques and language are best
- Where do they go for their information

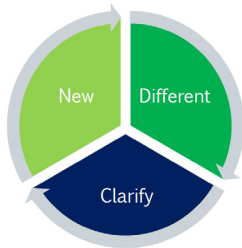


## Who & What

### ◆ Who Are You Trying to Persuade?

- IT Colleagues
- IT Leadership
- Clients
- Business Partners

### ◆ What is the focus of your communication?



- Something New
- Something Different
- Clarification

### ◆ Inquiring Clients Want to Know...

- What does IT do?  
(What don't they do?)
- How do we get started?
- How do we work with IT?
- How do we best leverage their services?

# Focusing Your Efforts

---



## Demographics & Client Profile Activity

At your table, discuss what drives your clients' decisions:

1. Who	
2. Long Term Goals (weeks, months, years)	
3. Short Term Goals (today, this week)	
4. History of IT Services	
5. Control & Risk Levels	
6. Business Priorities	
7. Communication Preferences	

### Attention-Getting Communication

- ◆ A press statement is a short, scripted message on a current or upcoming situation. A party line is for the entire IT staff “so we are on the same page”.

Be prepared with press statements and “party lines” for:

- Rollouts
- Upgrades
- Projects
- Implementations
- Problems or unexpected downtime
- Delays
- Cost or schedule overruns

- ◆ Leverage business feedback and company initiatives.

- ◆ When using email to convey your message:

- Subject line is critical
- Body is concise
- Relay “good news” first followed by the “bad news”

## Notes

## Hallway Marketing

◆ Everyone has these conversations.

◆ Questions you want to ask:

- Who do you want to influence?
- Why are you trying to influence?
- What do you want for results?



# Becoming an Ambassador

## Features vs. Benefits

1. The Client Focus: What does this mean to me?

2. The Client Choice: Two Questions they are always asking:

- How does this help me?
- How does this impact me?

Business WIIFMs

**Fact**

**vs.**

WIIFM

Personal WIIFMs

3. The Client Benefits: Answering the “So What?” question or “So that...”.

## Features vs. Benefits

### **Sweet & Crafty – Ice Cream Catering** **The Sweet & Crafty crew can help you:**

- > Improve attendance at your next meeting
- > Add flair to your next meeting
- > Reward your staff
- > Show support for your team




# Becoming an Ambassador

## Features vs. Benefits

### IT – Ice Cream Catering

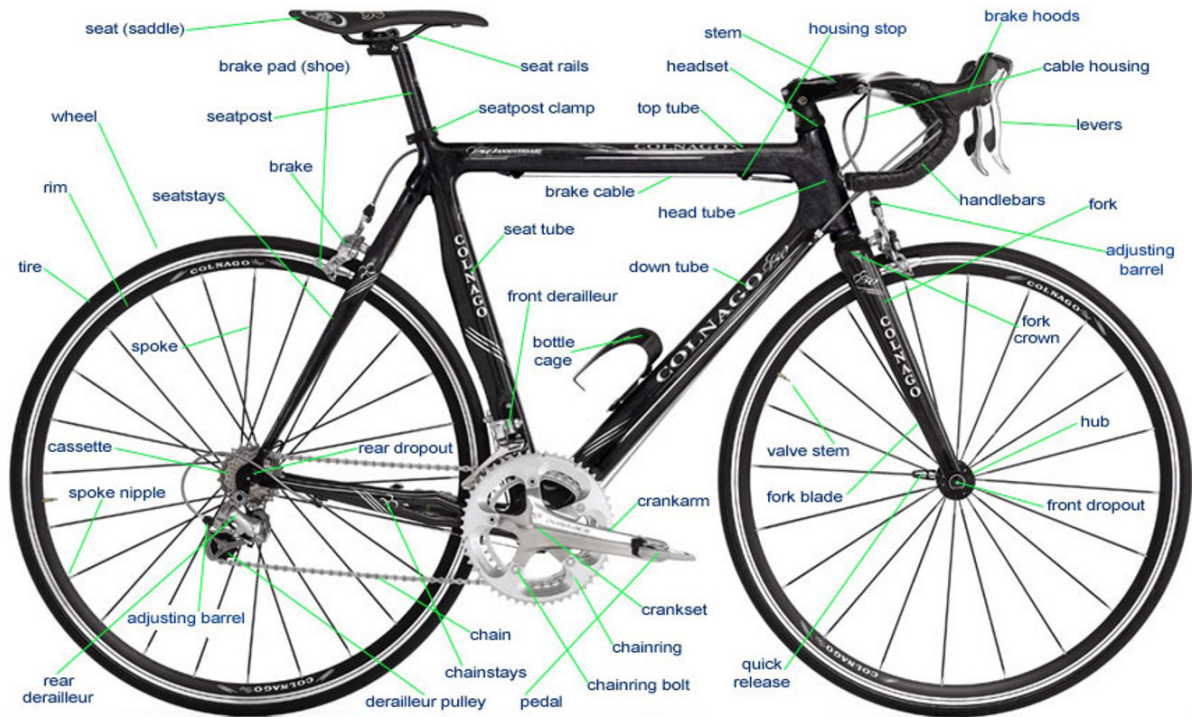
#### How do you want it?

<p><b>FLAVORS</b></p> <p>Chocolate Vanilla Raspberry Mocha Rocky Mountain Almond Joy Amaretto Banana Swirl Black Cow Birthday Cake Coffee Peanut butter Butterscotch</p> <p>Green Tea Pistachio Rum Hazel White Night Peach Mexican Flan Hot Chocolate Coffee Fudge Vanilla Espresso Orange Pineapple Peppermint Triple Fudge Pecan Sassy Lemon</p>			<p><b>Soft Serve</b></p> <p>Chocolate Vanilla Peanut Butter Strawberry Bubble Gum Raspberry Coffee Marshmallow</p>		<p>Cake Cone Waffle Cone Plain Waffle Cone Chocolate Dip Waffle Cone Sprinkles Waffle Cone Chocolate Dip Cake Cone Cherry Dip Waffle Dish Plain Waffle Dish w/Chocolate Waffle Dish w/the Works</p>		<p>Small/Med/Large Small/Med/Large Small/Med/Large Small/Med/Large Small/Med/Large Small/Med/Large Small/Med/Large Small/Med/Large Small/Med/Large Small/Med/Large</p>	
			<p>Hot Fudge Sundae Banana Split Swirlies Root Beer Float</p>		<p>Brownie Sundae Mt. Vesuvius Shakes Cookie Sandwich</p>			



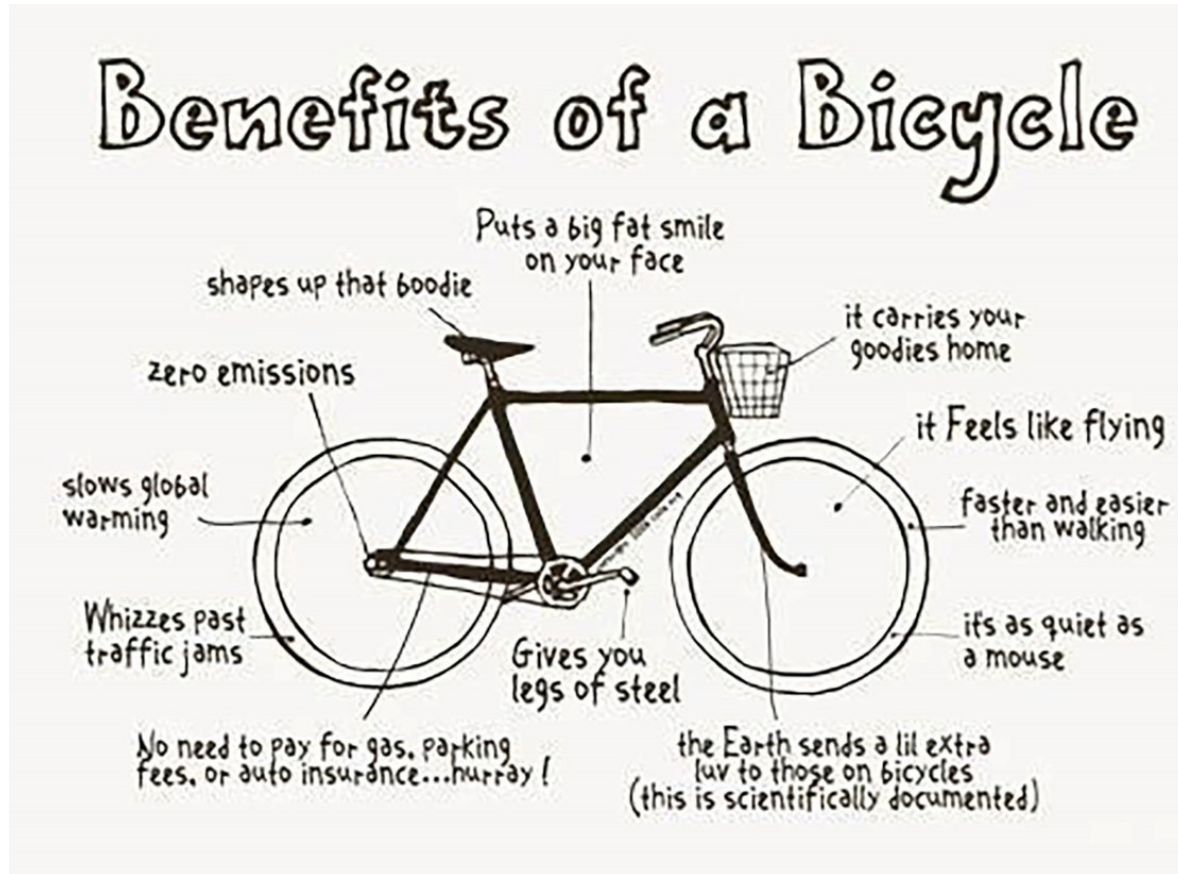
## Features vs. Benefits

### BIKE FEATURES



# Becoming an Ambassador

## Features vs. Benefits





## Benefit Statement Activity

<b>Option 1</b>	<b>Option 2</b>
<ol style="list-style-type: none"><li>1. Select a product/project/service that your team is working on<ul style="list-style-type: none"><li>- Name and brief description</li></ul></li> <li>2. Features &amp; Benefits<ul style="list-style-type: none"><li>- Brainstorm a list of features on the left side of chart</li><li>- Brainstorm a list of benefits on the right side</li></ul></li> <li>3. Map each benefit to a client - who are you trying to influence?<ul style="list-style-type: none"><li>- What is the advantage?</li><li>- What will they gain from it?</li><li>- What is the value to them?</li></ul></li></ol>	<ol style="list-style-type: none"><li>1. Select a product/project/service that your team is working on<ul style="list-style-type: none"><li>- Name and brief description</li></ul></li> <li>2. List typical business challenges it solves</li> <li>3. Write 2 benefit statements<ul style="list-style-type: none"><li>- Business WIIFM</li><li>- Personal WIIFM</li></ul></li></ol>

# Becoming an Ambassador

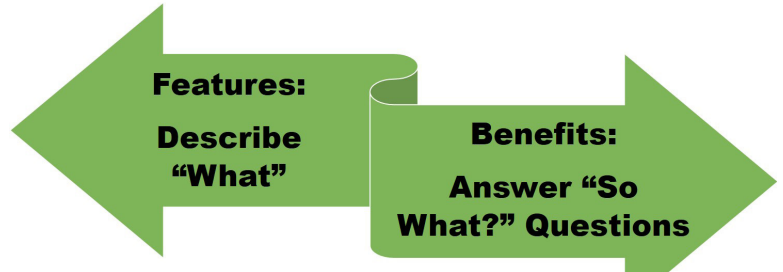


## Benefit Statement Activity

Feature	Benefit	Client

## Summary

**Stop Talking Features  
Talk Benefits!**



A FEATURE IS . . .	A BENEFIT IS . . .
What something <b>IS</b>	What something <b>DOES</b>

**Fact**

vs.

WIIFM

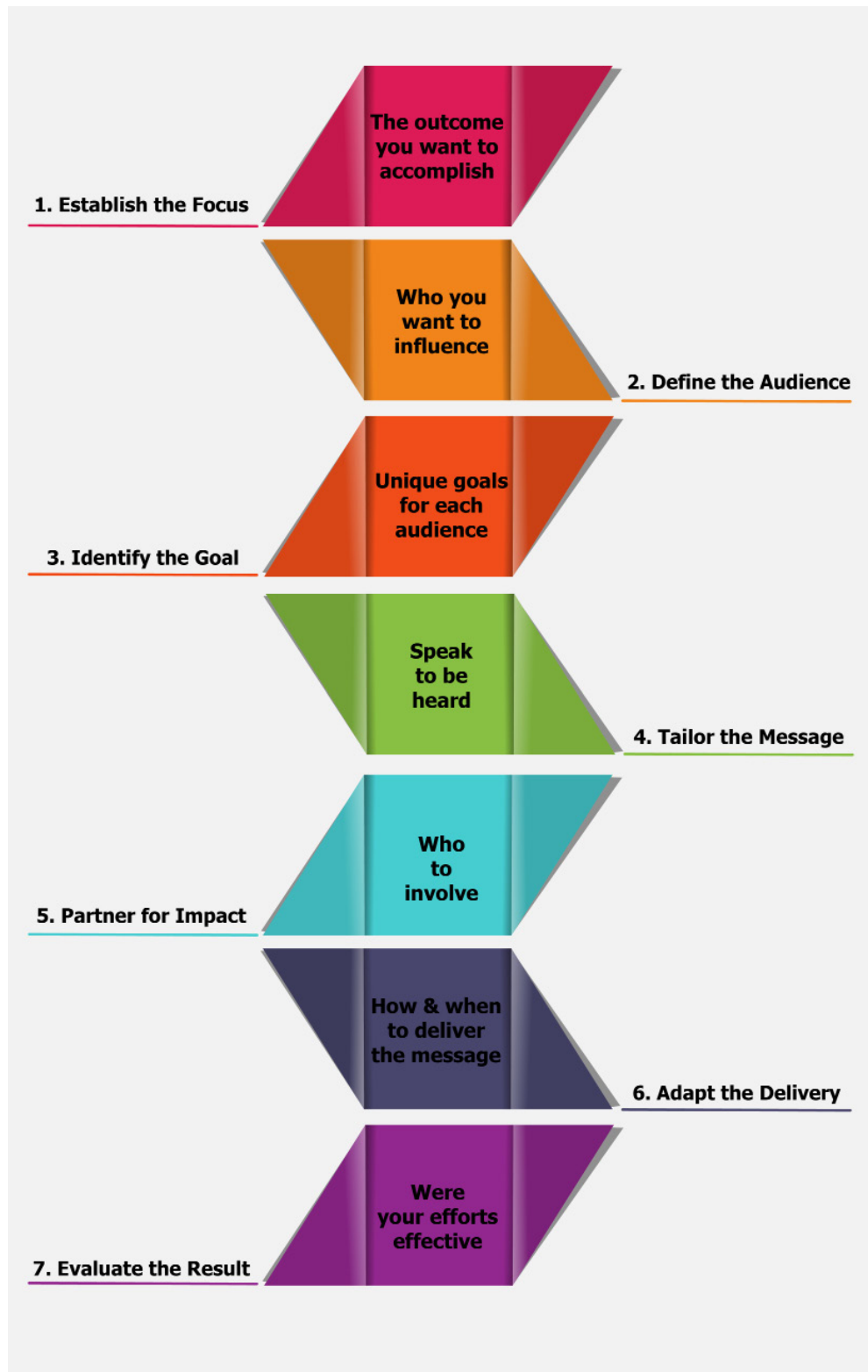
# Becoming an Ambassador

## Summary

- ◆ Marketing is an orientation, not a task.
- ◆ Hallway marketing is everyone's responsibility.
- ◆ Add value to every encounter with clients.
- ◆ Provide coaching or scripts for consistency.
- ◆ Speak and deliver benefits and WIIFMs!



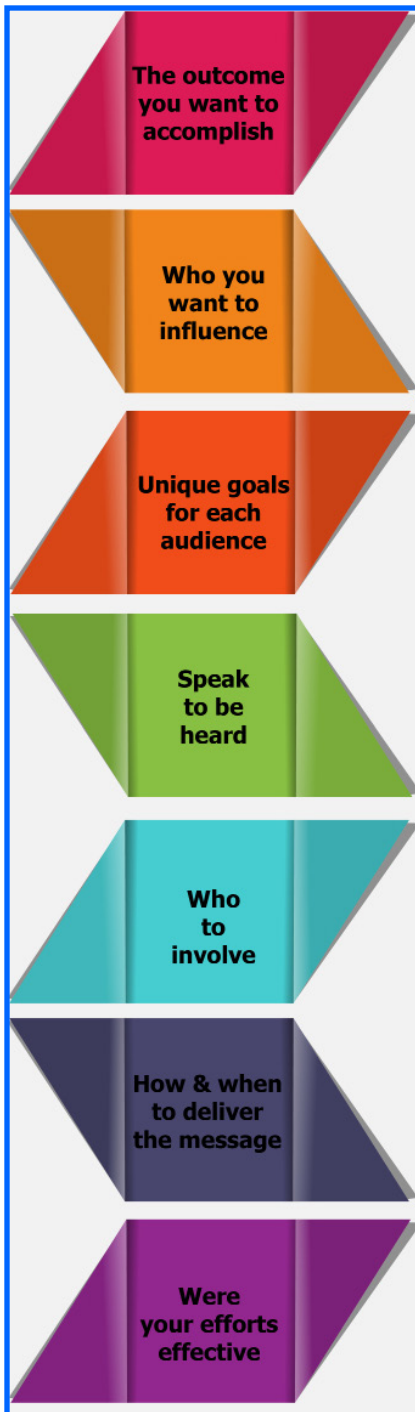
## IT Marketing Plan Components



# Creating a Marketing Plan

## Large IT Marketing Efforts

Consider how the effort will fit in with other day-to-day activities.



### ◆ Resources

- Where will you get the resources?
- Will there be a project manager?
- Who will be on the task committee?
- What is the accountability for the effort?

### ◆ Skills/Talent

- What skills are necessary?
- Do you need a communication specialist?

### ◆ Time

- How much time is involved?
- Is it a full time or part time effort?
- What is the priority level of this effort?

### ◆ Funding

- What is the budget for effort?
- Is there a defined ROI?



## Establish the Focus Activity



WHAT	WHY
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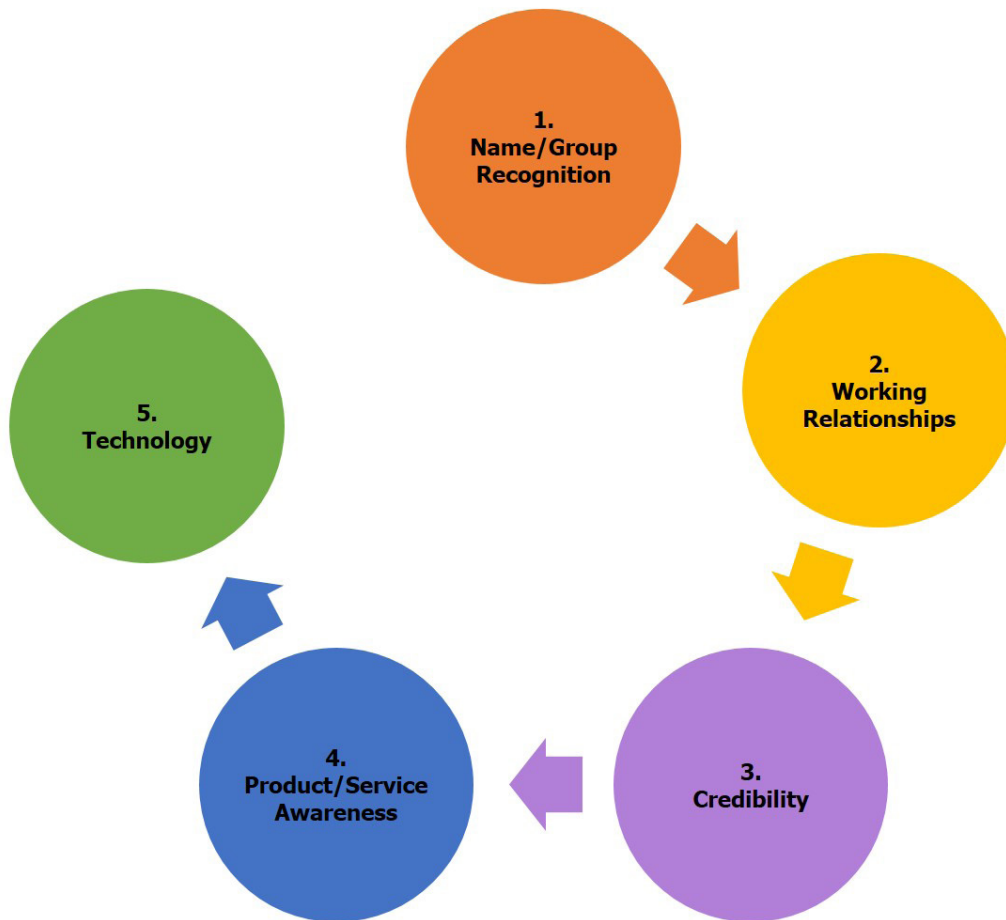
# Creating a Marketing Plan

## Establish the Focus

<b>CLIENTS</b>	<b>New</b>	<b><u>Market Growth</u></b> Market existing services and products to new clients (internal or external) <ul style="list-style-type: none"><li>- Medium risk</li><li>- Expand client base through community, mergers, other agencies</li></ul>	<b><u>Diversification/Expansion</u></b> Market new services and products to new clients <ul style="list-style-type: none"><li>- Highest risk</li><li>- Need well-thought out staffing, cost structure, and ability to deliver</li><li>- Can be very profitable</li></ul>
	<b>Existing</b>	<b><u>Client Retention</u></b> Market existing services and products to existing clients <ul style="list-style-type: none"><li>- Low risk</li><li>- Good starting point</li><li>- Helps solidify IT</li></ul>	<b><u>Market Penetration</u></b> Market new services and products to existing clients <ul style="list-style-type: none"><li>- Medium risk</li><li>- May provide IT with new business opportunities</li><li>- Need clients with medium/high trust of IT</li><li>- Delivery is crucial</li></ul>
		<b>Existing</b>	<b>New</b>
		<b>PRODUCTS &amp; SERVICES</b>	

- ◆ Where have you already marketed?
- ◆ What kind of time commitment are you able to make right now?
- ◆ What level of energy are you able to invest right now?
- ◆ What level of risk are you able to take right now?

## Establish the Focus



◆ Before you market technology, you must be able to answer “Yes” to the following questions:

1. Do clients understand who we are and what we do?
2. Does IT have strong working relationships with clients?
3. Is there trust between IT and clients?
4. Do clients understand the products and services we offer?

# Creating a Marketing Plan

## Define the Audience

	Dept. 1	Dept. 2	Dept. 3	Dept. 4	Dept. 5
Executives					
Senior Management					
Middle Management					
Staff					

	Senior Management	Middle Management	Staff
<b>FOCUS:</b>	Organization as a whole	The department & staff	Me & my job
<b>COST:</b>	Cost of sales and distribution	Operating costs	N/A
<b>BENEFITS:</b>	Profitability, productivity, market share	Ease & efficiencies	Personal motivators
<b>IMPACT CONCERNS:</b>	Commitments required	Effect on current workflow	Current operations, applications and standards

## Define the Audience

- ◆ Developing a Client Map is best accomplished when IT staff works as a team.
  1. First, draw a grid with the vertical columns representing the departments or functional groups within the organization, and the horizontal rows representing the levels within the organization. To keep it simple it should be limited to four levels: executives, senior management, middle management, and staff. Then, write in the names of current or past client groups or individuals who have used and benefited from IT's services.

This exercise gives IT professionals a baseline of past performance, which can be enlightening, and reveals entire areas or segments of the hierarchy that are untouched, which represent marketing opportunities.

2. Next, prioritize the groups based on their impact on the success of the organization. Then list the key business goals of these groups, identify key players in each, and select the top priorities to evaluate as marketing targets. Develop a plan to communicate to these people the services that the IT organization has to offer and the benefits of using them.
3. This exercise should be repeated at least once a year. In addition, the Client Map should be saved to evaluate progress against last year's Map.

# Creating a Marketing Plan

## Define the Audience



- ◆ It is important to understand your client's cultural background so you can recognize that they may interpret and convey things very differently than you.
  
- ◆ A client's culture influences your relationship three critical ways:
  1. They project meaning onto your words and actions as they listen to you.
  2. They block out your information that is inconsistent with their culturally grounded assumptions.
  3. They interpret your motives incorrectly based on their beliefs.
  
- ◆ Cultural bloopers happen to everyone!
  - Parker Pen in Mexico
  - Clairol in Germany
  - Coors in Spain
  - Gerber in Africa
  - General Motors in South America

## Identify the Goal



- ◆ What is the goal you are trying to accomplish?
  - Create awareness
  - Get involvement
  - Obtain buy in/approval/sign off
  - Secure compliance
  - Educate on services/how to use IT
  
- ◆ Why are you marketing?



# Creating a Marketing Plan

## Identify the Goal

### Environmental Forces

Generate a complete list of positive and negative forces that either work for or against your goal. Negative Examples: troubling economic environment, re-organizations, recent outages, poor history of service. Positive Examples: booming economic environment, past successful implementations, dedicated funding source.

#### ◆ Examples of Forces:

Reorganizations	Downsizing
Financial losses	Economy
Budget cuts	Stock market
Big corporate initiatives	Consumer Price Index
Bad history with IT	Pending war
Motivation of individuals/groups involved	Politics/elections
Organization's policies/procedures	Positive/negative publicity
External consultants	Enterprise initiatives

#### ◆ Consider Timing:

Month end processing	Quarter end
Furlough days	

#### ◆ Force Field Analysis Tool

- FFA is a tool for identifying and addressing organizational issues that help or hinder your marketing efforts.
- Designed to help you analyze events and problems from an action point of view.
- Kurt Lewin Field Theory: All situations can be seen as being in temporary equilibrium - there are forces acting to change the situation balanced by forces acting to resist the change





## Identify the Goal Activity

### Force Field Analysis Tool

<u>Negative Forces</u>	<u>Positive Forces</u>

# Creating a Marketing Plan

---

## Tailor the Message



### MORE

Revenue  
Membership

### LESS

Cost  
Excess Inventory



Output  
Quality  
Workforce Engagement

Effort  
Defects  
Cycle Time

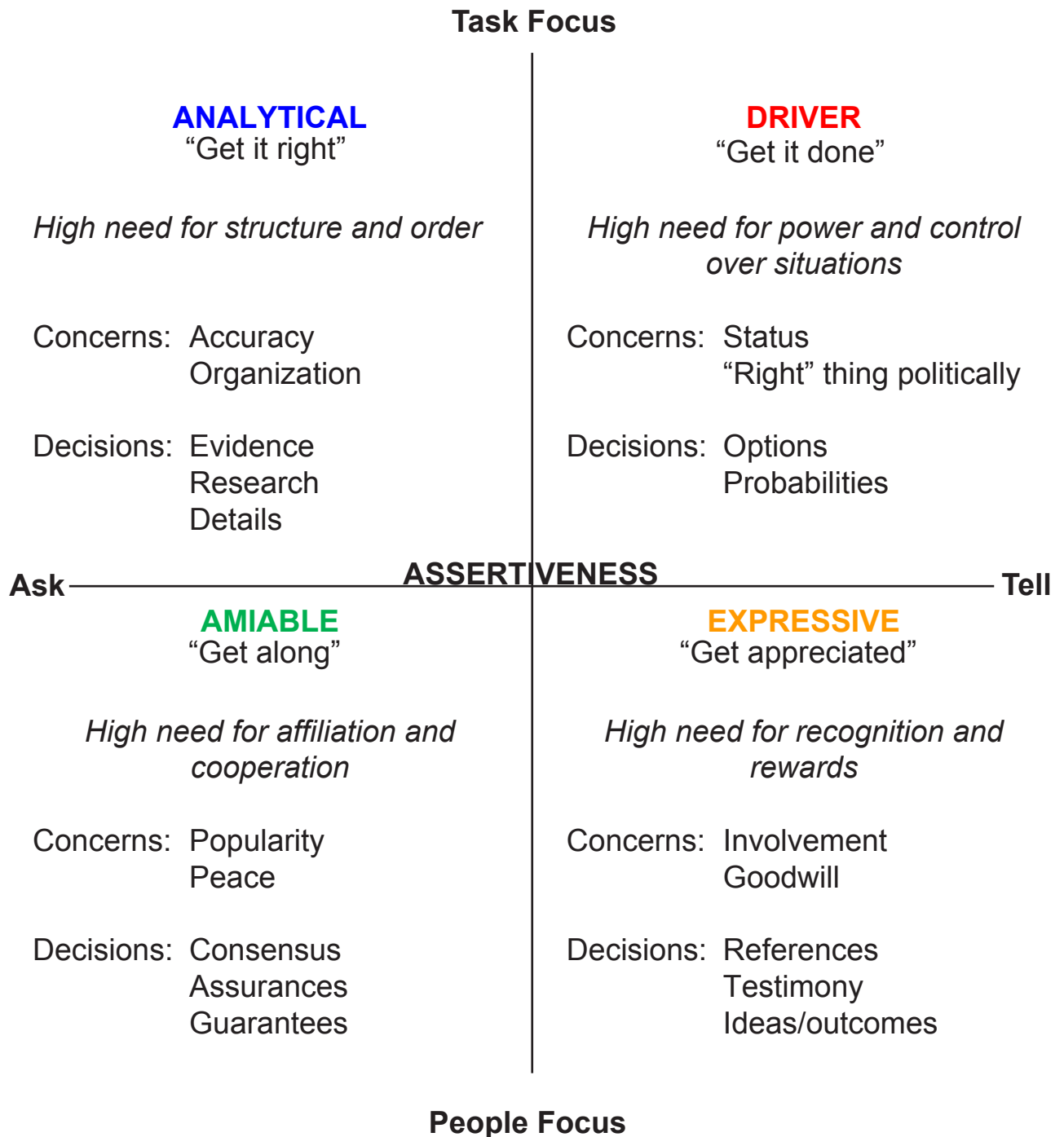


Licenses  
Accreditations  
Grants

Fines  
Sanctions  
Bad Publicity

# Creating a Marketing Plan

## Tailor the Message



Source: "Personal Styles & Effective Performance" David Merrill & Roger Reid

# Creating a Marketing Plan

## Tailor the Message

- ◆ Interest-creating statements:
  - Securing greater net profit
  - Reducing expenses
  - Better system control
  - Greater consumer confidence
  - More economical operation
  - Increased customer satisfaction
  - Up-to-date information
  - Greater user/department efficiencies
  - Greater accuracy
  - More control
  - Ensuring regulatory compliance
  - Eliminating bad company publicity
  - Greater company image
  - More marketshare
  - Increased shareholder value
  - Decreased employee turnover
  - Faster time to market

## Partner for Impact

- ◆ Who to involve - everyone in IT
  - Senior management
  - Middle management
  - Staff
  - Support staff
  - Every human touch point
  
- ◆ Communicate formal and informal plans and messages
  - Everyone must be on the same page
  - Everyone must send out the same message
  - Brand integrity
  
- ◆ Hallway marketing and elevator pitch workshops
  - Similar message
  - Unique but within brand

# Creating a Marketing Plan

## Partner for Impact

Identify people within your organization who could help your marketing efforts on both the client and IT side. Find advocates who can influence your target group.

- ◆ Sponsor - lends their name to your marketing effort and has significant stake in your success.
- ◆ Lobby Partners - will dedicate time and effort to work/speak on behalf of your marketing effort. Can influence commitment from others. May need to be recruited.
- ◆ Information Partners - people you want to keep in the loop and/or people you need to get information from.
- ◆ Problem Solving Partners - IT or non-IT resources who can assist in the task-related work.
- ◆ Internal communication professionals.
- ◆ How will you recruit your partners?
- ◆ What kinds of information do you need to provide and to whom? How often?

## Adapt the Delivery

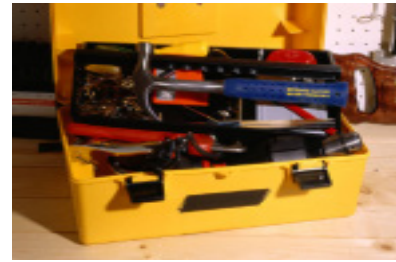
Audience	Goal	Who & How	WHEN

# Creating a Marketing Plan

## Adapt the Delivery

### I. Networks

- ◆ Social Media
- ◆ Social Events
- ◆ User Groups
- ◆ Client Liaisons
- ◆ Community Involvement
- ◆ Professional Organizations & Consortiums



### II. Presentations

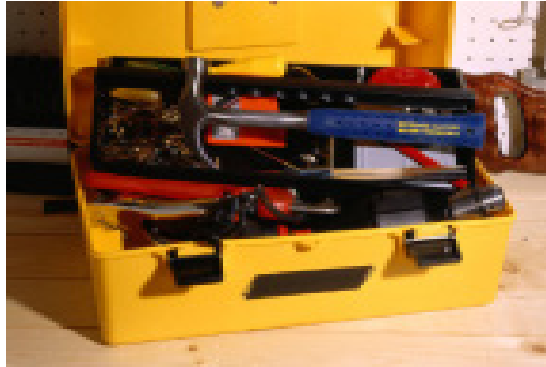
- ◆ Town Halls
- ◆ Technology/Productivity Fairs
- ◆ Scheduled Presentations
- ◆ Elevator Pitch
- ◆ Door-to-Door (“House Calls”)
- ◆ Brown Bag Seminars
- ◆ New-hire Orientation Programs
- ◆ Lobby TV

### III. Publications

- ◆ Mission Statement
- ◆ Portals
- ◆ Management Reporting
- ◆ Brochures
- ◆ Newsletter
- ◆ Posters
- ◆ Email Updates



## Adapt the Delivery



- ◆ Identify the best delivery technique(s) for your audience.

<b>Best Client/Situation</b>	<b>Maximize by</b>
<b>Weaknesses</b>	<b>Strengths</b>

# Creating a Marketing Plan

## Adapt the Delivery

### ◆ Branding:

- Personal Brand - increase trust, credibility and the ability to influence
- Company IT Brand - attract and retain the best talent
- Company Brand - hot tech company vs. “old, boring” tech company
- Regional Brand - located at a “tech hub” hot area or lost in the wilderness

## Adapt the Delivery



# Creating a Marketing Plan

## Adapt the Delivery

### The Power of Logos & Slogans

◆ Match the slogans on the right with their respective company on the left.

- |                                  |   |
|----------------------------------|---|
| 1. Dunkin' _____                 | a. The quicker picker-upper               |
| 2. M&M _____                     | b. Think different                        |
| 3. Verizon _____                 | c. It's finger lickin' good               |
| 4. Apple _____                   | d. Be all that you can be                 |
| 5. Lay's _____                   | e. It's everywhere you want to be         |
| 6. Bounty _____                  | f. Melts in your mouth, not in your hands |
| 7. L'Oreal _____                 | g. I'm lovin' it                          |
| 8. KFC _____                     | h. They're GRRREEEEAAAATTTT!!!!           |
| 9. Visa _____                    | i. America runs on Dunkin'                |
| 10. McDonalds _____              | j. Betcha can't eat just one              |
| 11. Army _____                   | k. Because you're worth it                |
| 12. Kellogs Frosted Flakes _____ | l. Can you hear me now?                   |

## Adapt the Delivery

- ◆ Consider various roles and responsibilities
  - Marketing Coordinator
  - Marketing Analyst
  - A Marketing unit within IT
  - A Marketing Committee
  - Communication Coordinator
  
- ◆ Resource allocation is key to your success.
  - Is it part-time or full-time?
  - Is it a group or just one individual?
  - Is it part of the employee performance objectives and evaluation?

# Creating a Marketing Plan

## Evaluate the Result

Establish a measurable outcome that would indicate the success of your marketing plan (Example: being invited to client planning sessions).

- ◆ Indicators that you are marketing IT successfully include:
  - ✓ Enhanced Professional Image
    - Clients speaking well of IT
    - Referrals
    - Unsolicited positive feedback from clients
    - Improved client satisfaction survey scores
  - ✓ More Involvement With the Business
    - Clients requesting assistance with strategic plans
    - Being included in meetings
    - IT initiatives part of client status reports and communications
    - Value added services are requested
  - ✓ Increased Productivity
    - Budget requests are met
    - Focused requests
    - Repetitious questions declining
    - IT morale is high

## Evaluate the Result

Check your marketing efforts. How will you sustain this marketing effort? What is your review timeline? Who will monitor the success of this effort?

◆ Review your goal - is it being met?

- Create a milestone/checkpoint timeline.
- Constantly evaluate with a “test market”.
- Evaluate level of effort against results.
- Seek out feedback.
- Improve content, delivery and media.



◆ Evaluate your Hallway Marketing efforts:

- Do you see your marketing goal obtaining anticipated results?
- Are you being recognized/rewarded for your Hallway Marketing efforts?
- Does the rest of your team understand what you are accomplishing?

# Creating a Marketing Plan

## Summary



- ◆ Become “One IT”
  - Change “I” to “We”
  - Speak highly of IT success
  - Create Press Statements and Party Lines
  
- ◆ Become IT Ambassadors
  - Create a clear, concise and creative “Value Statement” for you and your team
  - Speak in benefits vs features (WIIFMs)
  - Review Party Lines and Press Statements regularly in staff meetings
  - Create rewards and recognition to encourage positive marketing behaviors from your staff
  
- ◆ Hallway marketing is everyone’s responsibility.
  
- ◆ Marketing is an orientation, not a task.



## Communicating the Value - Pages 11-14

1. Are clients making false assumptions about IT? How can we better inform and remind them of our value?

2. Do I have a personal value profile? How can I help my team create a team value profile?

3. Do I have an elevator pitch for my top project/team/activity? How can I help my team create elevator pitches for our top 5 projects/activities?

# Action Planning Form

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## Focusing Your Efforts - Pages 15-19

4. Do I know what is important to my clients? How can I communicate with them in their language, about things that are important to them?

5. What recurring situation do I need to prepare a press statement for?

## Becoming an Ambassador - Pages 21-29

6. What types of impromptu conversations am I having with clients? How am I representing myself, my team and IT in a positive light?

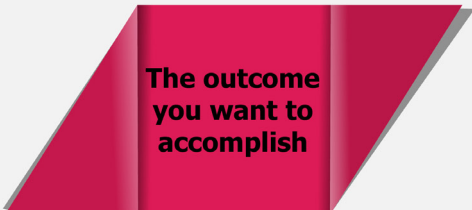






7. Where am I currently speaking in terms of features or benefits?

8. How can I learn more about my clients' WIIFMs?

# Action Planning Form

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## Creating a Marketing Plan - Pages 31-54

9. Establish the Focus	 <p><b>The outcome you want to accomplish</b></p>
10. Define the Audience	 <p><b>Who you want to influence</b></p>
11. Identify the Goal	 <p><b>Unique goals for each audience</b></p>
12. Tailor the Message	 <p><b>Speak to be heard</b></p>
13. Partner for Impact	 <p><b>Who to involve</b></p>
14. Adapt the Delivery	 <p><b>How &amp; when to deliver the message</b></p>
15. Evaluate the Result	 <p><b>Were your efforts effective</b></p>





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