

8 Steps to Experiential Thought Leadership

Bringing research based marketing to life

What is Experiential Thought Leadership (ETL)?



- Establishing a thought leadership position and communications approach.
- Combining brand and demand generation campaigns in an experiential manner.
- Delivering real value to customers and prospects by engaging them with information of significance to them.

Why ETL?

Common marketing goals and challenges addressed by ETL.

Goals

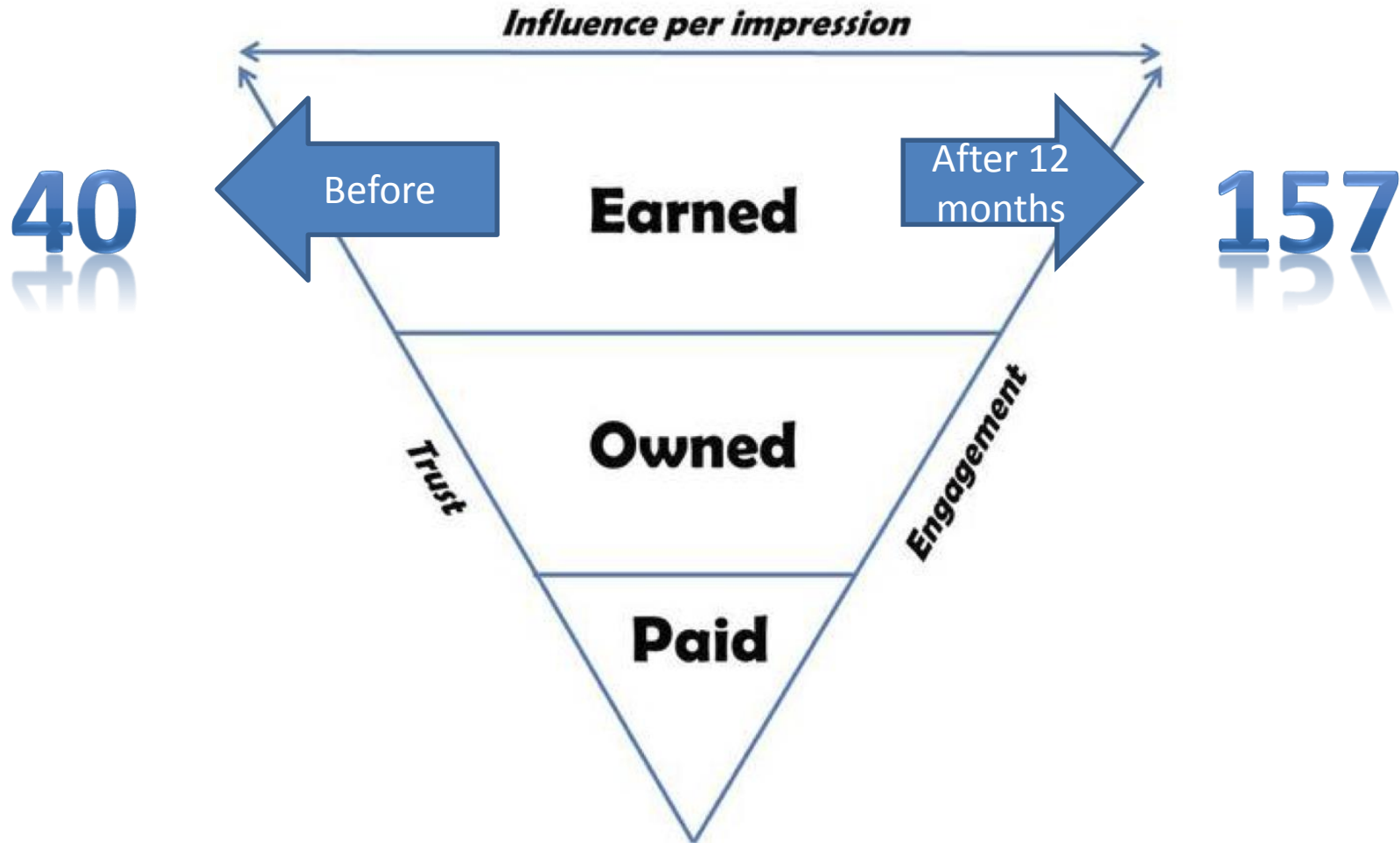
- Generate demand for solutions versus point products
- Reach senior-level decision makers
- Positioning the company as thought leaders
- Leverage best practice data in sales & corporate positioning
- Exploit the web and social platforms to drive responses and opportunities

Challenges

- Product heritage and culture in development and sales
- Lack of executive-level relationships
- Leadership must be demonstrated, not stated
- Separation between research and marketing tactics
- Ensuring web tools aren't transparent and self-serving

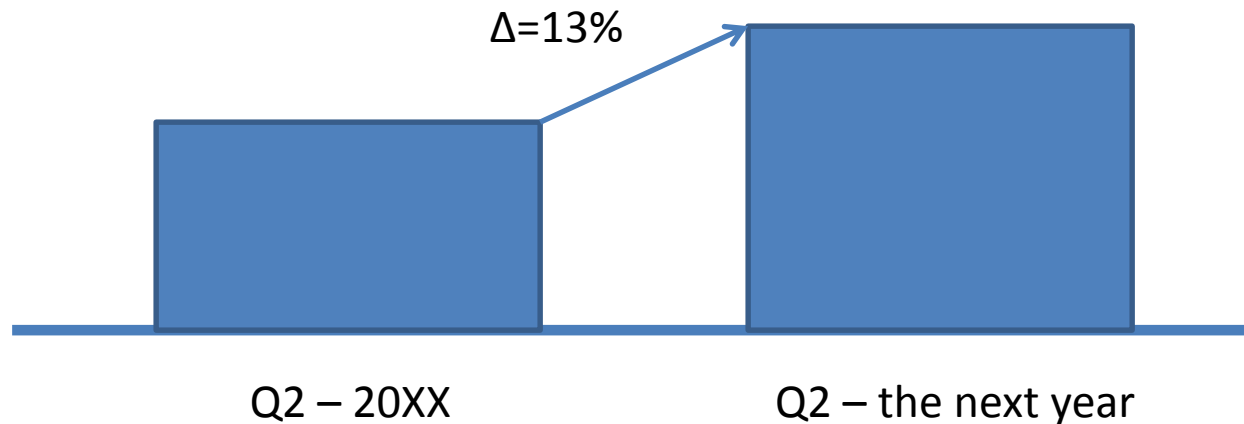
A SAMPLE OF ETL SUPPORTED BUSINESS RESULTS FROM VARIOUS ORGANIZATIONS

Impact on Earned Media



Shift in Perception

*Customers perceiving
our client
as a solutions provider*



Passive vs Active Engagement



Passive



200



Active



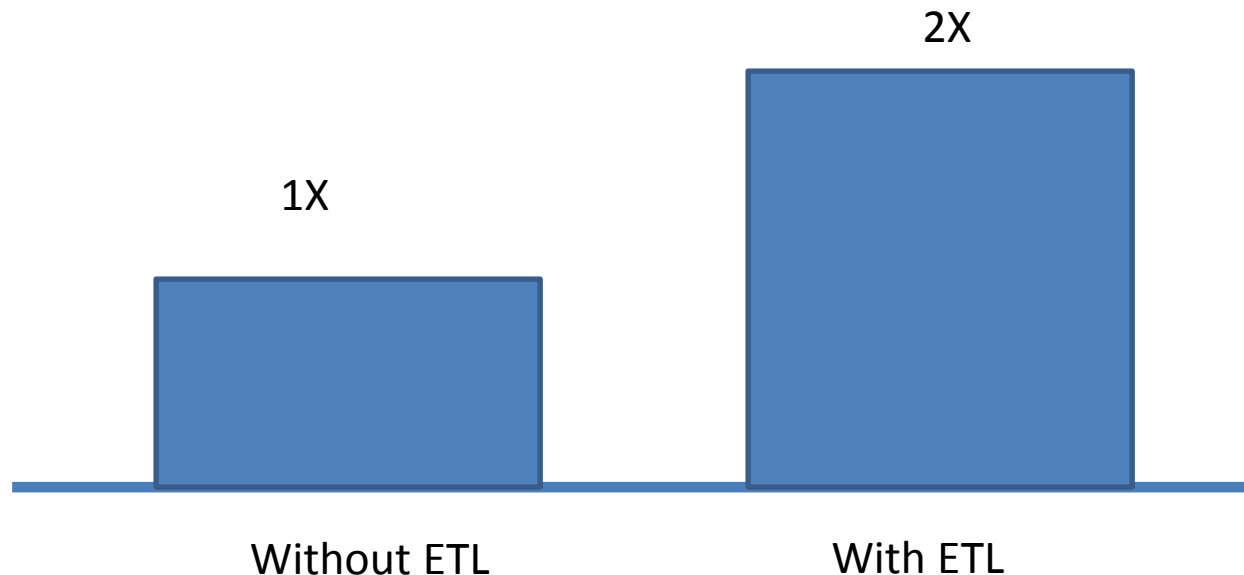
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Funnel conversion



Increase in average deal size

*Sales representatives
involved with ETL pilot*



Experiential Thought Leadership in action

A CORPORATE EXECUTIVE BOARD BEST PRACTICE CASE STUDY

IDENTITY NEED VALIDATION CAMPAIGN

OVERVIEW

Integrated campaign validates buyer's identity-related needs by demonstrating and quantifying common needs among internal stakeholders.

SOLUTION HIGHLIGHTS

- **Common Identity Value**
Demonstration of similar perspectives across stakeholders validates personal needs, reducing perceived opposition.
- **Quantification of Common Pain**
An online diagnostic helps buyers quantify common pain and provides an impetus for internal stakeholders to connect and justify the need for change.

SCENARIO

- SMART realizes that although many customers see the value of SMART's collaboration technologies, many fail to advocate for purchase or fail to complete the lengthy purchase process.
- In an effort to boost customer motivation and impact sales, SMART rebrands to draw out the emotional and personal benefits of SMART's solutions.

COMPANY SNAPSHOT

SMART Technologies

Industry: Technology
2013 Sales: \$589.4 Million
Employees: 1,042

SMART Technologies Inc., is a leading provider of technology solutions that enable inspired collaboration in schools and workplaces around the world by turning group work into a highly interactive, engaging and productive experience. SMART delivers integrated solutions of hardware, software and services designed for superior performance and ease of use, and is a world leader in interactive displays.

SMART shows buyers that their identity needs are shared by others to justify advocacy for change.

- SMART shows commonly shared pain points that impact customer's reputation and self-perception from multiple perspectives to help buyers see that others would likely support a solution.
- By showing widespread impact of these pain-points, SMART emphasizes the benefits of advocacy (i.e., winning support and respect from others who want change) and decreases the perceived risk of advocacy (i.e., objections).
- A sense of social permission validates the advocate's own personal desire for change, and helps them feel more comfortable speaking up.

COMMON IDENTITY VALUE

SMART.
Inspired Collaboration™

Excerpts from Freestorm™ Video

Video Screenshots Highlight Communication Break-Downs from Multiple Stakeholder Perspectives

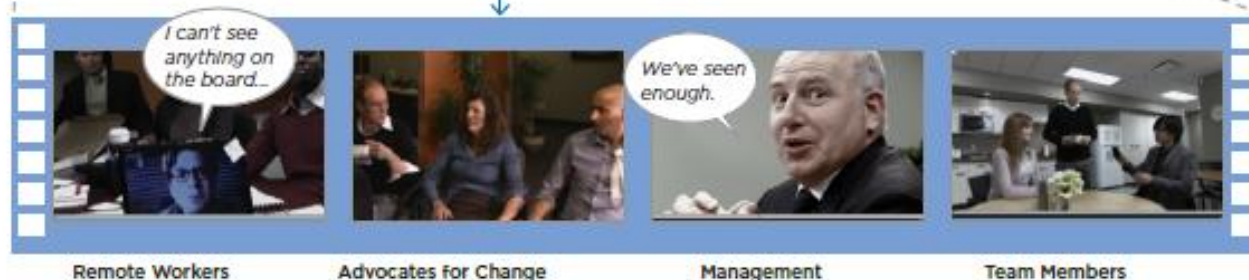


To motivate advocacy, SMART depicts common identity pains that its collaboration software can address, namely:

- Feeling unappreciated or left out by the team
- Feeling unable to contribute anything worthwhile

Source: https://www.youtube.com/watch?v=qSMhZU_VICs

SMART shows Identity pains from multiple perspectives, which helps advocates feel justified in speaking up for change.



Source: SMART Technologies; CEB analysis.

- SMART's Freestorm solution is a platform that combines interactive displays, collaboration software and remote collaboration tools.

A diagnostic validates identity needs by quantifying the number of employees who share pain points and the magnitude of that pain.

- The diagnostic highlights identity needs and business problems, which helps bolster motivation while enabling advocacy.
- Questions imply that participants should feel confident, comfortable and able to contribute—and that technology can have a positive impact on their identity.
- Results from multiple stakeholders reveal the common desire for change, reducing the risk of advocacy for individuals.

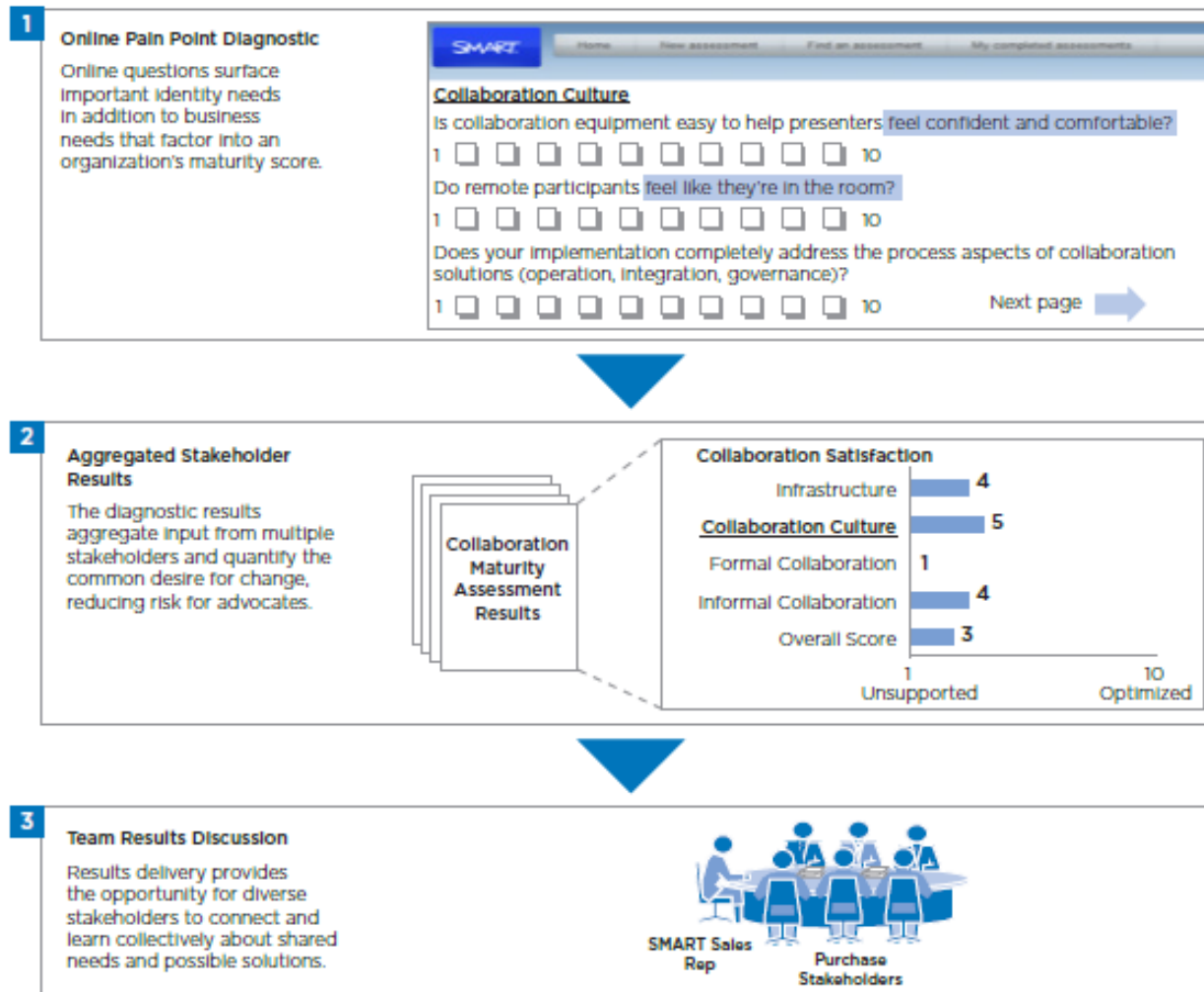
Implementation Tip

You may need to distinctly quantify identity value when you anticipate a high degree of customer skepticism.

QUANTIFICATION OF SHARED PAIN

SMART
Inspired Collaboration™

SMART's Shared Pain Diagnostic (Excerpt), Results and Review



Source: SMART Technologies; CEB analysis; smartbusiness.agencyzed.com.



By validating customer identity needs, SMART motivates buyers to drive the purchase forward and improves lead conversion.

- By validating buyers' identity-related needs, SMART drives greater commitment to action.
- As a result, SMART has seen strong engagement with its shared pain diagnostic and increased conversion rates across the funnel.

NEEDS VALIDATED

SMART's Campaign Results

"Leveraging the diagnostic as part of our engagement with SMART...kept us moving forward during this project."

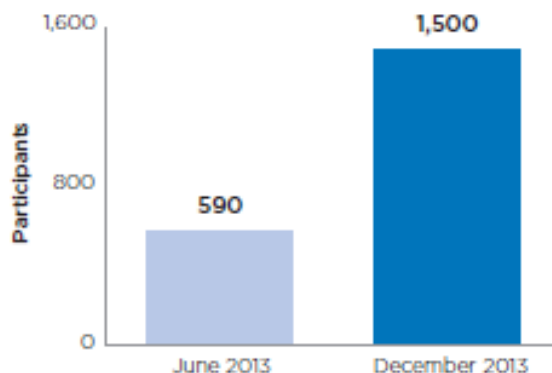
Carlton L. Haithcox, Sr.
Business Process Exec
Global Integration Solutions
IBM Inside Sales

SMART
Inspired Collaboration™

"This campaign moved customers from 'I just have to accept that meetings are terrible' to 'I can make the case for change and should speak up.' The emotional piece gets people committed to change and the benchmarks show that change is possible."

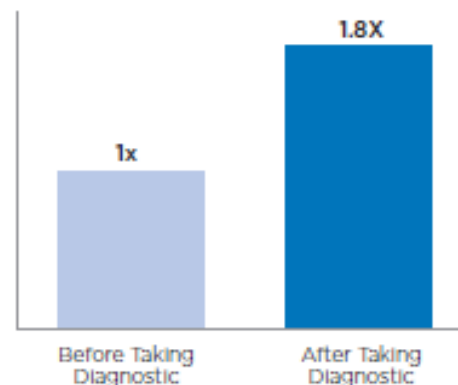
Jeff Lowe,
Vice President of Sales and Marketing
SMART Technologies

Total Participation in Shared Pain Diagnostic *June to December 2013*



Source: Smart Technologies; CEB analysis.

Customer Willingness to Speak to Sales *Percentage of Buyers in Contact with Sales Pre and Post-Diagnostic*



Source: Smart Technologies; CEB analysis.

EIGHT Steps to Engagement



1. Select thought leadership focus area
2. Build research instrument and gather data from target audience
3. Analyze data and create best-practices benchmarks
4. Highlight and enable comparatives
5. Create interactive & social experiences
6. Optimize Marketing Mix
7. Leverage research to deliver value through experiences
8. Measure results and adjust/modify

1 Select Focus Area

- In what strategic area or discipline would you aspire to be considered a thought leader??

**Thought
Leadership**



- In what solution area would you like to drive qualified leads?
- Leverage social to find out what is relevant to your customers

2 Instrumentation & research

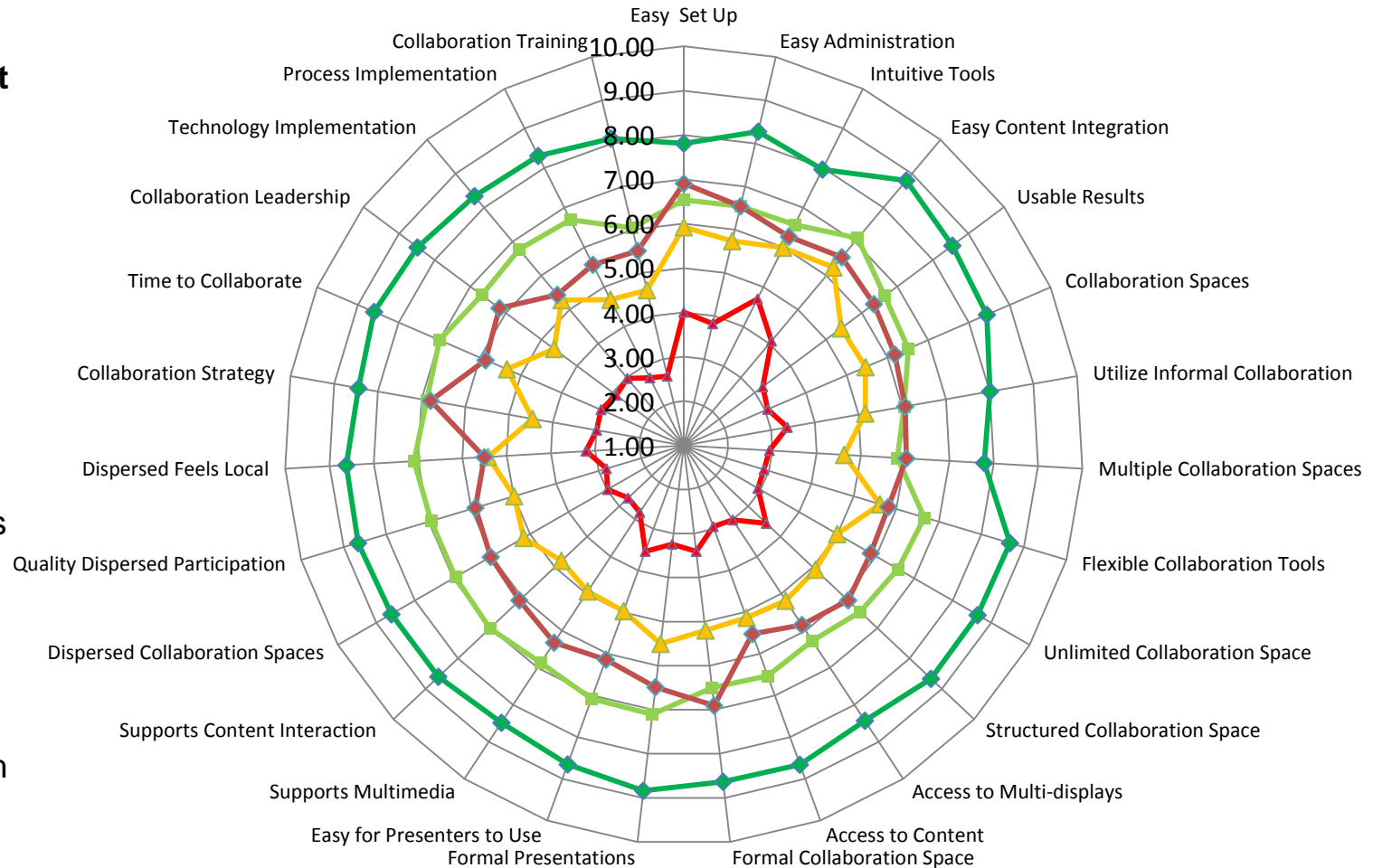
- Collaborate with your thought leaders and customers
- Develop and validate research instrument
- Quantitative research to test hypothesis of topic area
- Compilations of data and preparation for analysis and synthesis

3

Analysis, Synthesis and Best Practices

Example: Collaboration best practices research

- Collaborate with your thought leaders about the research results
- Synthesis the results into specific findings
- Link back to original hypothesis of topic area
- Summarize with comparatives



4 Highlight and enable comparatives

- Role
- Function
- Industry
- Public / Private or Not for Profit
- High Performers / Low Performers
- Size
- Geography

5 Create interactive experiences

- Speaking engagements and interactive presentations
- Event kiosks
- Facilitated sales tools
- Social communities
- Interactive Experience
 - **Uses weighted data model**
 - **Users receive personalized ratings and comparisons**
 - **Ability to deliver custom recommendations**
 - **becomes perpetual research project = continually refreshed content**

Content Delivery Choices

What can
be done?

How do we
do better?

Why should
we do this?

Knowledge:

- Possibilities
- Define models / processes
- Scenario & long term forecasting

- Reference architectures
- Best practices

- Business cases
- Value propositions
- Benefits definition / modeling

Example tactics:

- Visualizations
- Communities / social
- Vignettes / case studies

- Capability Assessments / apps
- Interactive documentation
- Guides
- White papers

- Benefit models / apps
- Published financial content
- TCO/ROI models
- Economic value tools / apps

Content delivery & information gathering mechanisms



Epaper linked
To a forum
discussion



Video / Animation
(case study, paper, interview,
panel) & USB



Forum discussion



Infographic
linked to a
an app or a
forum
discussion



Audio paper
linked to an
interactive app
5/12/2015



Digestible Interactive apps



Online panel
discussion/debate
With ongoing discussion
capabilities



Customer led
summit/panel fed to
An online forum

6 Optimize Marketing

- Digital Marketing including social platforms and other relevant communities
- Inbound Marketing
- Outbound Marketing
- Collateral and Whitepapers
- Advertising (all types)
- Trade Shows, Events and Seminars
- Speaking Engagements
- Public, Media and Analyst Relation activity
- Internal Communications with Sales Force

Marketing optimization example

Inspired Collaboration Brand Campaign

Inspired Collaboration™ | SMART.

Brand Video Card

SMART Channel Partners were provided with a quantity of Brand Video Cards to use as sales tools in their customer meetings. The CTA on the piece was to drive customers to the Inspired Collaboration Assessment Tool.

These Brand Video Cards included key messaging on Inspired Collaboration, an embedded video on a 4" screen that automatically plays the video when you open the card, as well as a USB magnet that automatically launches the Inspired Collaboration Assessment Tool when plugged into a computer.



WATCH THE VIDEO 

Marketing optimization example



Inspired Collaboration Brand Campaign

Inspired Collaboration™ | SMART.

Infographics and Research Studies

SMART commissioned a global research study with Filigree Consulting, which demonstrates that organizations have varying levels of maturity in leveraging technology to enable collaboration. Customers and our Channel Partners have access to research-based white papers that tell a comprehensive story about best practices in achieving a transformative collaboration strategy. Infographics were also developed as a visual means to tell the story, highlighting key metrics and messages from the research.

Education



Business



Marketing optimization example

Inspired Collaboration Brand Campaign – Channel: P.O.S.

Inspired Collaboration™ | SMART.

Inspired Collaboration Window Decals

Each bubble represents individual ideas that contribute to something greater.



Inspired Collaboration Business Cards

CTA: Invites customers to take the Inspired Collaboration Assessment

Business



Front



Inside

Education



Front



Inside

Sticker

CTA: Take the assessment



Tent Cards

CTA: Take the assessment



Business



Education

Marketing optimization example



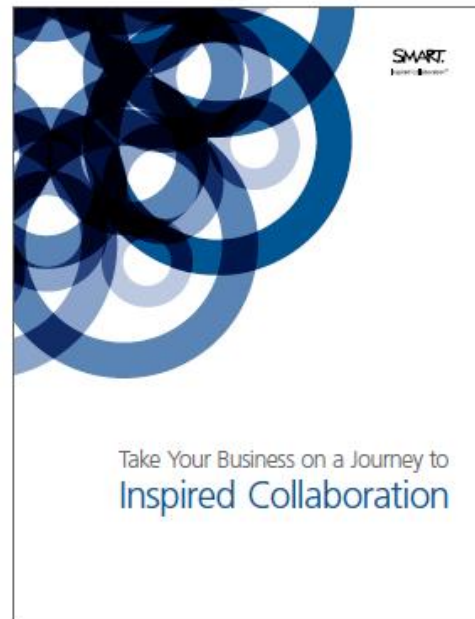
Inspired Collaboration Brand Campaign – Channel: Brochure

Inspired Collaboration™ | SMART.

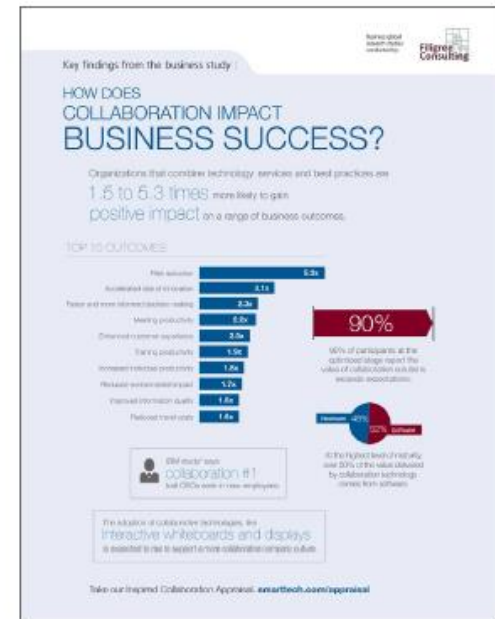
Inspired Collaboration Assessment – Business Brochure

Provides customers with a quick visual snapshot of the impact successful implementation of collaboration strategies has on business outcomes. (Results based upon a research study conducted by Filigree Consulting.)

CTA: Invites customers to take the Inspired Collaboration Assessment



Front



Back

Marketing optimization example

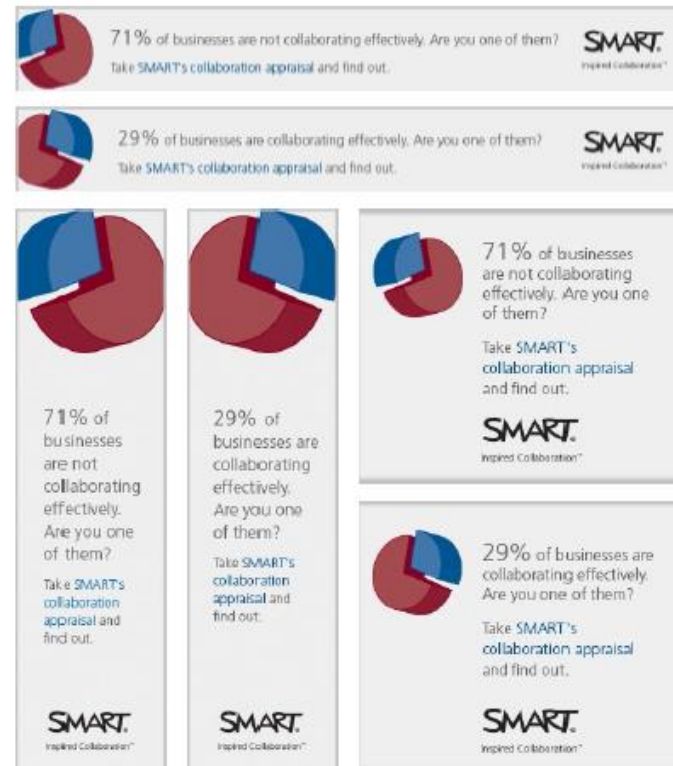


Inspired Collaboration Brand Campaign – Channel: Digital Assets

Inspired Collaboration™ | SMART.

Inspired Collaboration Assessment: Business Digital Assets

Banner ads targeted at business customers for our Channel Partners to use in their marketing efforts to drive customers to take the assessment to measure and self-evaluate their collaboration maturity.



Marketing optimization example

Inspired Collaboration Brand Campaign

Inspired Collaboration™ | SMART.

How it Works Together

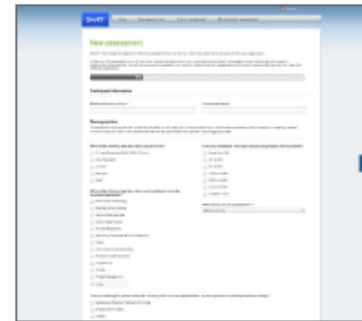
The marketing campaign allows us to marry the emotional brand story of Inspired Collaboration with the tangible results of the value SMART solutions can provide, help customers assess where they are today and then equip the sales channel to have a deeper, more informed conversation with their customers and prospects.



Marketing Tactics



CTA: Drives the customer to the Inspired Collaboration Assessment



Customers fill out online assessment



Customer results

Marketing optimization example

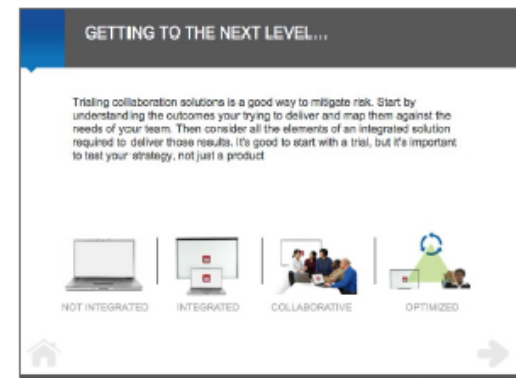


Inspired Collaboration Brand Campaign

Inspired Collaboration™ | SMART.

Inspired Collaboration Assessment Tool – Sales Presentation

After a customer completes their assessment, a customized sales presentation is produced for the sales representative to use in discussion with that customer. This presentation enables the sales representative to become a Collaboration Consultant as they use the information to evaluate and investigate where the customer is getting value and where there is room for improvement.



7 Deliver value through research

- Introduction to sales calls – consultative selling
- Leverage through social prospecting
- Trade Shows & Seminars & online events
- Executive events and speaking
- Corporate webcasts
- Input to business intelligence/corporate strategy
- Input to product development
- Input to Customer Support / Care

8 Measure & Adjust

Potential measurement criteria:

- Number of research papers fulfilled, downloaded, shared
- Social media measurements such as engagements, sentiment, shares, Retweets, etc.
- Percentage of utilization by corporate strategy/planning/development
- Percentage of utilization by sales in customer presentations
- Number of registrations / assessments
- Size of assessment database overtime (i.e. growth)
- Number of marketing qualified leads
- Number of sales qualified leads
- Number of sales meetings
- Number of sales closed

Moving Forward



How to get started on a ETL Project?

- Discuss potential thought leadership areas
- Review existing research to leverage
- Explore current state of consultative selling
- Find out what customers / competitors are talking about on social channels or other relevant communities
- Review current lead generation efforts & status of sales pipeline