

# Modern Marketing Using AI

Leverage AI-enabled Marketing Automation and Insights to Drive  
Customer Journeys and Maximize Your Brand Equity

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Pooja Chitnis**



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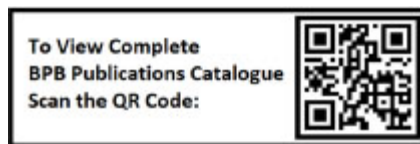
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# About the Authors

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More information on Malay & Pooja can be found at [TheUpadhyays.com](http://TheUpadhyays.com).

# About the Reviewer

**Suneel Yadav** has 24 years of brand, marketing, and communication experience with an eclectic mix of industries – financial services, FMCG, and advertising. For him, it's always been about breaking out of his comfort zone. A Mass Communication (IIMC) postgraduate with an MBA in Marketing, he has the expertise in building brands and managing them across industries. His experience ranges from setting up the digital and e-commerce business for an Insurance company being their first e-business Intrapreneur (AIG Worldwide), creating and launching multiple brands for an FMCG giant, and leading Marketing teams for a couple of financial services firms. While in advertising, he has managed the launch of media entertainment properties like Indian Idol in India, rebranding exercises for a telecom giant, multiple advertising and marketing campaigns for clients ranging from banks to airlines to FMCG to IT. A big believer and proponent of the digital transformation of marketing, he presently leads the marketing function for a financial services company and is based out of Bangalore.

# Acknowledgements

*From Pooja Chitnis*

Behind all our struggles, failures, and successes is a loving support system that keeps us going. A group of special people who work hard to pick us up as we fall, support us through all our endeavours, and remind us about the light at the end of the tunnel. Here are a few pivotal ones I would like to acknowledge.

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# Preface

*An apple a day keeps the doctor away.* We all know this adage, but the choice of fruit here is a curious one. If there were a celebrity in the world of fruits, it would be the humble apple. What is it about this brand - if it can be called one - that has stood the test of time? Synonymous with the most valuable brand – Apple – in the world today, it was a symbol of one of our biggest discoveries – gravity – for centuries before that. And for millennia, it has been a symbol of the very moment – Eve biting it – that led to our state of existence today. As far as brands go, it is tough to think of one stronger, timeless, more versatile, and more resonant than this fruit. Time to unlock how a brand achieves such a feat.

Welcome to *Modern Marketing Using AI!* This book is the third instalment in the AI Management series. *The AI Dilemma* helped educate readers on the current and future state of AI across industries, while *Artificial Intelligence for Managers* trained non-technical managers on how to understand and use AI successfully and responsibly. In a similar vein, this book has two simple objectives: to guide you on everything you need to do to help your organization grow and sustain its customer base, and to acquaint you with how – and why – you must embrace advanced technologies to achieve this. Let's dive further into these two objectives.

What helps a business survive and thrive? Simply put, it is the acquisition and retention of customers year after year. Remember, a customer will only commit to a brand when he/she inherently likes and trusts it, which in turn requires authenticity in what the brand is about and the value it brings. And for the value to be relevant, it must fulfil the deepest need or desire that the target customer carries. This is a brand's journey through the mind and heart of its customer. Without its successful and complete execution, a customer is always prone to moving on. And yet, the word 'brand' itself is often treated more as an elegant aspiration than the bread-and-butter it inevitably is to an organization's existence. Part of the reason is its perceived intangibility.

We all carry a brand; the one that we intentionally construct or is constructed for us over time. Some remain consistent no matter where we go, while others change with time, place, or audience. Mama's kid at home, the cool

one in college, and so on. At every step through every interaction, our influence on others - and our success by extension - is driven by our brand. And the personalities that speak the loudest and impact a set of audience the most are the ones that are clear and consistent in their appeal to that bunch - be it 'coolness' that a group can aspire to, or 'niceness' that another can love. Our brand never leaves us, and those who wear it best are the ones we consider authentic and trust. Organizational brands are no different.

This book is not a mere lesson on branding. Brand is a medium that has been used to explain and guide the readers on what it takes to grow and sustain a business in the modern day – be it rain or sun, Covid or no Covid. A brand journey, in many ways, is the journey a customer takes in his/her discovery, interaction, and bonding with a company and its offerings. And only in looking through the minds and eyes of the customers can an organization consistently deliver value and build lasting relationships.

That brings us to the second objective of this book. Over time, the art of acquiring and retaining customers has become increasingly complex, with various subsets of marketing, sales, and customer success now demanding a team of their own. Think product marketers, social media marketers, channel marketers, sales development reps, account managers, and more. For each group, the tasks involved have become just as complex, with a plethora of processes and technical solutions to use and manage. Our job, therefore, is to try to keep up with advancing technology, learn how to use it effectively for specific tasks, and focus on the micro-objectives that should align with work being done in other teams – all of which should ideally lead to customer growth and retention for the company. And while we are heads down on it, technologies like Artificial Intelligence continue to advance and automate more and more of these specialized tasks.

So, how do we change the prevalent system – one where we remain a useful asset while the company truly achieves its customer objectives? What we need is to be able to understand how each task, solution, or initiative can most effectively aid the organizational growth – and when it can't - and to be future-ready so that we can move from being replaced by AI to managing the AI performing our original tasks. That is what leads to a win-win situation for all. This book is designed to help marketers achieve this goal.

The book is split into four sections – understanding the brand journey, attracting customers, winning them, and turning them into loyal fans. Each is

laden with technologies that can be leveraged to achieve those goals. The authors bring together lessons from live use cases, two global B-schools, and an experience spanning four countries and six different industries to reveal tactics and skills that businesses need to grow, and that marketers today are expected to execute at work.

**[Section 1](#)** is about understanding the brand journey. It begins with **[Chapter 1: The Importance of Brand Equity](#)**, which explains the importance of focussing on a brand's value and how to maximize it by achieving brand resonance. **[Chapter 2: A Typical Brand Journey](#)** then highlights the stages a brand goes through *en route* to that resonance, while **[Chapter 3: The Convergence of Marketing, Sales, and Customer Success](#)** discusses how and where these three functions come into play at each stage. These three chapters reimagine the marketing ecosystem in its current state, which brings us to look at how we got here over the decades in **[Chapter 4: AI and the Future of Marketing](#)**. That allows us to understand where we are headed next, the insurgence of Artificial Intelligence, what it is, what are its benefits and risks (as with Subliminal Marketing), and what that means for the future.

**[Section 2](#)** is about attracting customers. This is where we take the first steps of a brand journey, and specific tech solutions start to come in to support each step. **[Chapter 5: Validating Your Brand and Product](#)** deals with deciding on the very product or service to be offered, that a brand will represent. **[Chapter 6: Brand Identity](#)** shows how a brand starts to take shape in order to accurately reflect the validated offering and its value to the intended audience. This is a foundational step involving a clear understanding of who to target, why, and how. These two chapters highlight the world that brand and product marketers face. **[Chapter 7: Brand Awareness – Web Presence](#)**, **[Chapter 8: Brand Awareness – Social Media](#)**, and **[Chapter 9: Brand Awareness – Online Ads](#)**, deal with making the brand visible and known. They start with the nuts and bolts needed to ensure its stability and organic discovery on the web, which paves the way for the next two chapters to enhance the brand recognition and recall through the vast domain of social media channels and advertisements while also touching upon Recognition marketing and Virtual advertisements.

Having attracted the customers in the previous section, **[Section 3](#)** is about winning them. Here, we enter the more sophisticated strategic and procedural aspects of marketing. **[Chapter 10: Operational Alignment and Automation](#)**

shows the central tenets that are essential to effectively execute, automate, and sustain marketing and sales processes in order to leverage real-time insights once a brand is established. We therefore learn about marketing operations and stack planning. [Chapter 11: Brand Credibility](#) deals with building trust and authenticity in the eyes of our prospective B2B or B2C customers, through efforts like Influencer Marketing. [Chapter 12: Brand Engagement](#) explains how prospective customers move from positively recalling and trusting a brand to actively engaging with it, particularly with the help of Channel Marketing, Account-based Marketing, Partner Marketing, and Affiliate Marketing. Lastly, [Chapter 13: Selling Strategies](#) shifts focus to converting the engaged B2B prospects and discusses effective selling strategies and processes as well as the sales operations workflow needed to enable them.

Finally, [Section 4](#) concerns the nurturing and growing of existing customers towards loyalty and fandom. [Chapter 14: Customer Onboarding](#) presents a thorough guide on how to onboard customers (particularly, B2B) in accordance with the brand positioning. It also brings up the crucial domain of Consumer Neuroscience and why current techniques in this field can be so effective at this stage. [Chapter 15: Brand Receptivity](#) helps drive these customers to loyalty, retention, upsell, cross-sell, and the acquisition of other customers. All of that brings us to the topic of **Brand Resonance** in [Chapter 16](#). Here we learn how loyal customers eventually become die-hard fans of a brand – a state where they stand by the brand even in times of economic downturn or crisis and keep it alive. The section concludes with [Chapter 17: How to Prepare for the AI Era](#), which provides a guideline for marketers to become AI ready and even estimate how likely AI is to replace their jobs.

The stages in each section are explained through the examples of Una, a master baker and entrepreneur, who wishes to launch and grow her bakery business. Her brand includes a B2C retail business directly at the bakery, a B2B business supplying breads to restaurants and grocery chains, and a personal trainer/influencer brand. We see how her budget and resource realities shape the way she positions her brand at different stages, which marketing initiatives she undertakes, and at what time she brings in the necessary tools to support her efforts – all gradually building resources to enable bigger initiatives. With real-world examples of successes and

failures, it all makes for a fantastic story – or sets of stories – that is at once fun and informative while also transforming how you see your customers and your own brand.

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# SECTION 1

## Understanding the Brand Journey

Welcome to this tale of the brand and its customer. This book can be viewed from several different lenses. It can teach us how to acquire customers and turn them into fans (a state different from mere loyalty); it can help us understand how to execute the complete marketing, sales and customer success cycle in our digital era; and it can enable us to create a brand that people love - whether for ourselves or for our companies. Many of the fundamentals here are naturally steeped in traditional theories we learn in B-schools. However, in the era of AI, a marketer's job looks very different, thanks largely to its focus on analytics and automation.

*Artificial Intelligence for Managers*, the first book in this series, focused on AI techniques and their management. This book focuses on the Marketing use cases of those techniques and looks at pre-existing tools to guide marketers in the formulation of a robust tech-enabled marketing plan. The narrative is loyal to what marketers need to learn and execute this discipline in the field. It borrows from a comprehensive marketing plan that the authors have developed over the years to function in any industry, with key emphasis on the timing and the reason behind undertaking any marketing initiative if you wish to see results. To cite an example in the context of social media, the questions this book will answer is not *What does Twitter do, why is it useful or how to create a Twitter account and post regularly*, but *How to decide if Twitter is right for your business, when to activate it in your brand journey, which steps to take in every session on the platform, and which tools can help you execute those steps efficiently and effectively*. As a result, you will walk away from this book with the knowledge to develop your own templates and automations to execute a technology-driven marketing, sales and customer success process in the present times.

As you will find, social media, and indeed, digital marketing is one cog in a larger ecosystem. And while this book looks at tools and techniques that drive the modern-day customer journey, it is important to understand both the

customer journey and its relevant technologies to make sense of where and when to use what. That is why we begin this first section by understanding the marketing and AI ecosystem itself, the customer/brand journey, and the target you should really be aiming for.

The first section sets the stage with three business use cases that will be followed throughout the book. It also looks at:

- The importance of maximizing brand equity
- What a typical brand journey looks like
- How marketing, sales, and customer success work together
- The impact of AI on marketing

The chapters included are:

- [Chapter 1: The Importance of Brand Equity](#)
- [Chapter 2: A Typical Brand Journey](#)
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# CHAPTER 1

## The Importance of Brand Equity

In the introduction to [Section 1](#), we mentioned that this book will teach us how to acquire customers, turn them into loyal fans, execute the complete marketing, sales, and customer success cycle in our digital era, and create a brand that people love. But why is the key to achieving all this so ingrained in branding?

### Structure

In this chapter, we will discuss the following topics:

- Defining brand equity
- Importance of brand equity
- Marrying marketing, sales, and customer success
- Introducing Una and her brand

### Objectives

This chapter lends clarity on the goal we will be pursuing through the course of this book: maximizing brand equity. It explains what that means and why that is important. By the end of this chapter, you will be able to identify the primary growth objective of any business, understand the meaning of brand equity and how it impacts a brand, understand why marketing, sales, and customer success need to work together, and get acquainted with Una and her brand, whose business case will help guide us through a typical brand journey.

### 1.1 Defining brand equity

The primary task of any business is to make money, responsibly. That involves offering a product or service in a socially, environmentally, and ethically responsible manner, which a customer will happily pay for. The

latter in turn requires at least two conditions to be met: the product or service should add value to the customer, and the business should comply with the customer's personal, social, and ethical value and aspirations. A brand is that singular piece of identity that surmises both these conditions in the minds of a customer.

Every entity has a brand, whether it is an individual, a company, or a product. Think about it: You have a subtle opinion of everything and every person around you; and that perception or identity you associate with that entity influences your conduct or engagement with it. Brands work in the mind and consequently, have the power to surpass facts. To cite a pedestrian example, think about how easily many of Donald Trump's supporters would accept the reality of climate change, if Trump himself endorsed it. On an organizational scale, think about the unwavering perception of superior usability that die-hard fans of Apple carry about the brand, regardless of the company's minimization of ports and its relatively closed ecosystem. Or the consumers' desire to buy the latest model every year, strong enough to justify standing in hour-long queues outside Apple stores.

Apple is one of the few brands strong enough to have even managed to convince its consumers that they need an entirely new product type, such as a tablet. Was it a real pre-existing but unrealized need, or did it come into existence the first time we laid eyes on the concept of a tablet? Of course, some product lines are created to meet an existing need such as Gatorade's energy drinks, originally invented to address sports nutrition. It led to the creation of an entirely new segment in a drinks industry previously considered saturated. Such innovative measures to meet an explicit or undiscovered market need, coupled with effective barriers to market entry, can supercharge a brand's growth, thereby ensuring its appeal to consumers. We will discuss this more in the next section. For now, spare a moment to a brand's linkage to sustaining customers.

Economies grow and shrink over time, as do specific product demands within an economy. The simple solution to sustaining and retaining customers' interest is to keep fulfilling a need they value. The better the fulfilment, the higher the brand's value and appeal. That is measured by brand equity. It measures the power of a brand, which reflects the value of that brand for its customers. A brand's equity is the incremental value (say, goodwill or financial value) that a customer attributes to a product purely

due to its brand. Imagine a pair of Nike shoes, without the Nike logo on it. How much more would a customer be willing to pay for these shoes if it had the logo? That is Nike's brand equity.

But why am I telling you this? Branding is rarely conceived as a discipline core to an entity's existence and crucial for its growth. This in turn leads to a person or business developing an unclear identity in the minds of its audience, which in turn implies a lack of appreciation for the value it can offer. Let us now understand why a focus on brand equity is so important.

## 1.2 Importance of brand equity

Consider a movie where an A-list actor gets paid \$10 million, while his lesser known coactor with an equally important role in the movie, and perhaps even better acting skills, gets paid \$100,000. That incremental \$9.9 million salary is directly attributable to the A-list actor's brand value. As we saw with Nike's example, that is the power of a strong brand equity. Without it, a brand will remain easily replaceable in the minds of its customers. So, in many ways, the implied objective of a business or individual looking to increase its customer base and market value is to maximize its brand equity.

Strong brand equity is important because it ensures that the brand's customers keep choosing its products over others. In a situation where the product itself becomes obsolete or less important, a strong brand equity allows the company to transition to alternate offerings without losing its customers – or at least gaining new ones more easily.

A stellar example of a popular brand reinventing itself would be *Fujifilm*, which had originally considered the digital threat to its core film photography business to be somewhat exaggerated, having tried to pivot too soon. Its competitor, Kodak, tried to meet the threat head-on and eventually failed when the digitization of photography truly took hold. Fujifilm, on the other hand, invested in assets that initially seemed totally unrelated and came out of its R&D labs in the form of chemical compounds that could serve pharmaceutical and cosmetics industries. These new lines of business eventually turned into multibillion dollar streams, pushing the company's traditional film photography products to the periphery. (1) Fujifilm survived and thrived, even though the once much more powerful “*Kodak moment*” lost its sheen.

In an economic downturn, a neighborhood bakery can survive only if it manages to keep the customers coming. That is likely to happen in one of three situations:

First, the bakery offers a product that's staple for customers in the neighborhood. One such offering would be a loaf of bread, since customers are less likely to splurge on fancy cakes in a dire economic situation. However, the bakery will not only have to focus more on this product line but also ensure it can sell breads at a lower cost than, say, a larger grocery chain like Walmart. Beating Walmart or any mass retailer on prices can be extremely difficult, as the cost of production per loaf is likely to remain higher for the neighborhood bakery.

Second, the bakery can move into a new product line such as raw materials like flour, sugar, sauces, etc. However, beating the likes of Walmart on these materials is once again challenging.

Third, the bakery can avoid the price war. The price customers pay is directly correlated to the value they ascribe to a product. That value could come from offering greater convenience or from the customers having a soft spot for the bakery due to the goodwill it has developed. For example, the bakery could offer convenience with quicker home deliveries or be naturally located in an area far from grocery chains or other competitors. Either of these, however, would require luck and/or additional investment. What about quality? The promise of freshly baked natural ingredient-based bread any time of the day. That sounds appealing, health wise, but would only work on customers who appreciate these in their staple.

Maintaining a higher perceived value of your offering is the only way to ensure you can retain customers because customers will always invest in what they deem important. Your brand represents such an offering. The higher the perceived value, the higher the brand equity. The trick, therefore, is to find what it is that a customer will value, ideally always. Conversely, for a given value on offer, who are the ideal customers and how can that value be made better for them? This is why a brand journey often goes in circles, where the brand is compelled to reinvent its value or in rare cases, even its target customers, with changing circumstances as we saw in the Fujifilm example above. The really good ones, of course, manage to hold their value through most of the changing winds, thereby saving the organizations a ton of investment, effort, and uncertainty.

That state of maximum brand equity, as we will learn later in this book, is called **brand resonance**. And it has to do with our most innate desires, our values and things that tend to make us sentimental. These are invisible attributes, historically identified by marketers through psychometric focus groups, intuition, deep observation, or experience. The era of AI changes that by being able to retrieve such hidden information – behavioral patterns – through automated analysis. The art of uncovering such detail and executing upon it takes us to the realm of customer facing functions – namely, marketing, sales, and customer success.

### **1.3 Marrying marketing, sales, and customer success**

The quest to maximize the brand equity - and to keep it there – is an ongoing endeavor. All of marketing, sales, and customer success is designed to effectively plan and execute the brand journey to achieve it. Organizations continuously need these functions because of the continued nature of the brand journey itself. However, what separates effective customer-facing teams from others is that the former is a bunch that understands the importance of strengthening brand equity to ensure the organization's survival and success. As a result, such teams plan and execute their functions with a singular focus of achieving brand resonance.

Over time, the central role of marketing, sales, and customer success has become less obvious from an organizational point of view. Ironically, a factor contributing to this is our increased knowledge. These core drivers of a brand journey have become incredibly vast and specialized. Today, they rely on very different approaches and compulsively require technologies that automate or support every minor aspect of their roles. As a result, they are generally approached in silos even though the underlying technologies rely on accurate data and information flow across the organization. The employees are often so deep in their respective silos that they simply do not have the time or bandwidth to appreciate the bigger picture. It's a scenario that organizations are becoming increasingly aware of as they set out to get the organizational data streamlined to be able to use advanced technologies like AI.

In focusing on any one of the three functions or their sub-functions, we often forget to think about whether they are together being effective in increasing the brand equity, which is a key indicator of happy customers. This disconnect results in incoherent execution of tasks in each silo, despite the fact that they are all being directed at the same customer. To understand this, think about a recruiter trying to hire a candidate. The candidate states in his interviews how open he is to different views, but his social media accounts show that he is heavily involved in intense debates and favoritism. To his customer, that is the recruiter who will decide whether to pay for the candidate's services as an employee – such incoherence has already reduced the candidate's credibility.

As we will find in this book, authenticity and credibility are key components of a loved brand because it implies one that can be trusted. Without it, there is no hope for loyalty or fandom. One way to appear credible is to be consistent in what a brand says, which is more difficult at an organizational level due to the number of individuals/teams involved. Just the way we develop a perception about anything or anyone we engage with, customers develop it for the brand. So, to ensure an entire organizational brand can stay true to its intended image for a single customer is imperative. And that is no easy task, certainly not if employees are not focused on ensuring this. The video of one misbehaving sales staff member at a McDonald's in a remote suburb of Vancouver can impact the global image of the entire chain, even if it were on a subconscious level. And that can invisibly impact millions of dollars and hundreds of hours of effort invested by the company's marketers in creating an image of friendliness and joy. The next time I see Ronald's smiling face, I may find it fake. And McDonald's may not come to know of this damage until it's grown big enough to start showing on the company's bottom line.

Such possibilities also remind us of how big an achievement it is for the customer-facing teams of McDonald's to have held their strong brand equity and become globally relatable enough to be the go-to brand for us to use in narratives such as this. After all, McDonald's was the pick for *Thomas L. Friedman* to explain the *Golden Arches Theory of Conflict Prevention*, which stated that *no two countries that both had McDonald's had fought a war against each other since each got its McDonald's.* (2).



Apple, Gatorade, Nike, and McDonald's are big fishes, already with an established brand and an army of brand managers. The relatability and relevance of this book is based on much smaller players, who aspire to get to those upper echelons. Yes, a strong understanding and execution of a brand journey can take your business to unforeseen heights. But not all brands need to become global. There are many unknown brands who have achieved resonance at a much smaller scale and intend to stay there. Consider a street side vendor selling parathas in a little corner of Delhi's famous *ParantheWaliGali* – a small lane filled with vendors selling varieties of paratha (an Indian fried bread). Around a dozen shops are now gone, but one – *Pt. Gaya Prasad Shiv Charan Paranthe Waale* – founded by *Pandit Gaya Prasad* in 1872, and now run by his sixth generation, still survives. (3) The price of one paratha has risen 1000x from the original ₹0.06 to ₹60 in this time. That's still less than a dollar, but relatively close to many upscale restaurants in India – for a fraction of the costs they incur. The shop's brand equity is strongly linked to that of the area itself that it helped establish. The value is linked to both its fascinating historical run and taste, which appeal to the bulk of local and foreign visitors for whom perceived quality is not the main draw. The shop's brand equity is not geared to help it transform into a posh restaurant; but to continue offering a far earthier experience, and instead ensure survival at profit.

Then there is the Haldiram's brand, founded in 1941 as a humble sweets and snacks shop in Bikaner, a city in the Northwestern Indian state of Rajasthan. Today, the business is worth US\$ 1 billion in revenue. (4) The name carries a certain sense of dependability for its customers who want quality Indian sweets and snacks whenever needed for special occasions or for regular consumption. The firm's brand resonance has been achieved with a focus on balancing tradition with modern culture, continuous innovation and a singular goal of preserving the business and its values (5). It has helped the business grow into a thriving chain of restaurants across the country, and a manufacturer and supplier of packaged sweet and snacks globally.

In soccer, games are won by teams that can score goals without conceding the same. Likewise, businesses thrive by developing brands that can first capture and retain a steady base of all-weather customers to sustain positive cash flow. After all, not all entrepreneurs or businesses want to create billion-dollar global businesses, nor do all businesses have that big a market. The

objective of businesses may be different, which influences the route taken to achieve brand resonance. Nonetheless, for a given route, personal or corporate brands follow the same brand journey from an unknown entity to one with loyal fans. Therefore, it is the brand journey that we must strive to understand to be able to devise overall effective strategies to drive growth for ourselves or for that of our organization.

## 1.4 Introducing Una and her brand

The primary difference in brand journeys, besides the business objective, is in the nature of the customer. The customer may be an individual or another business. In either case, the customer may be a potential employer who will pay for your services, a buyer of your product or service, or a subscriber or sponsor. With this in mind, it is important to visualize the brand journey from three lenses – **business to business (B2B)**, **business to consumer (B2C)**, and **personal business**.

The ensuing narrative risks over-complication if we follow multiple storylines through the course of the book. Perhaps, it would be simpler to keep our focus on one instance that appeals to all three lenses. We began with a hypothetical scenario of a bakery's survival and growth in wavering economic situations. Let us stick with the simplicity of this use case. Enter, Una.

Una is a master baker and a budding entrepreneur, who would like to pursue her passion and skill as a full-time career. Una has been praised countless times in her immediate circle for her baking skills. Over the years, she has witnessed her own skill grow from a stage of casual interest and exploration to intense successful experimentation in unique, crafty bakes. If she is so good, why not do it full-time? Una's aim is to now start a successful bakery. She has saved enough to be able to make the initial investment, with some loan. By default, she envisions a shop flocked by customers who appreciate her many tasteful varieties. In other words, she primarily sees a **B2C** model for her business.

Una knows that the very idea of starting a bakery is etched upon the reception her bakes have received from those who have tasted it, at home, in social gatherings and in local community events. As such, the main draw is Una herself and the trust she enjoys among those familiar with her work. In other

words, until her business establishes itself, her own brand will be her greatest asset. Consequently, Una will have to work hard to grow her **personal brand**.

Finally, while Una has avoided giving it any serious thought, she knows that there are two eventual roads her business may take – evolve into a chain and cater to more mature institutions who have a need for her products. The latter would include restaurants or even grocery chains who sell or use baked goods. Una could strive to become their primary supplier. Would that be good for her business, or would that distract her from her own store? Una does not know yet but understands that there is a strong potential to develop a **B2B** model for her bakery as well.

Una's central task is to bake scrumptious products that customers would die for. Her first task to set up an outlet to sell such products is to gather sufficient funds to invest in starting the business, for which she is willing to apply for a loan. However, the success of both these efforts and of the business itself would depend on clarity of what will ensure willing customers and guarantee the success of the business. The right logo, the name, the target customers, the choice of offerings on the menu, the costs involved, something else? Right now, Una is faced with more questions than answers. With the right help, she will never have to look back.

## **1.5 Conclusion**

As seen in this opening chapter, brand equity is a crucial parameter to keep in mind for any business. It reflects the incremental value of a given entity in its customers' eyes, thanks to the brand itself. The incremental value need not always be financial and reflected in the pricing. It can also influence a customer's preference for the brand's product over competing products, even if all are priced similar.

Through the course of this book, we will learn how to maximize your brand's value. We will follow the evolution of a brand – personal or organizational – to explain the journey undertaken by our prospective customers from first learning about our brand to becoming its fans. We will undertake this journey from an execution point-of-view. Which marketing, sales, and customer service initiatives work at which stage of the brand journey in present times and why? In doing so, the chapters will educate you on where the different

elements of these functions fit in. For example, simply posting frequent and catchy social media posts is not enough; it is important to know when you should focus on them (if at all), what must be in place first, and what your posts should focus on, to aid different levels of your customer's journey. For organizations, its automation and use of insights from other systems is just as important. Similarly, sales takes more than just an engaging conversation, especially when you factor in the little habitual nuances of your customers. After all, people forget, get distracted, and even shy away from ever telling you what they really want. This, in fact, is also why customer success serves as the final bridge to bring customers over to the resonance side of a brand.

In summary, the book is designed to teach you the modern-day customer acquisition and retention lifecycle by establishing a brand that attracts and retains fans. How it is achieved in the modern day through the unavoidable use of AI-enabled technology, forms the pillar of our story.

## Questions

1. The power of a brand is measured by something called the \_\_\_\_\_.
2. What is the implied objective of a business or individual looking to increase or sustain its customer base and market value?
  - a. Maximizing brand equity
  - b. Achieving brand credibility
  - c. Making money, responsibly
  - d. Creating strong marketing, sales, and customer success teams
3. If you are willing to pay \$4 for a Starbucks cappuccino but not more than \$3 for it at the neighborhood café, Starbucks' relative brand equity can be valued at \$\_\_\_\_\_ per cup of cappuccino.
4. Brand is only needed for bigger or more evolved businesses but not so relevant for smaller or local businesses. Is this statement true or false?
5. Every business should have a Facebook account and should post regularly on the channel to be popular. Is this statement true or false?
6. Brand equity is important because:
  - a. It can maximize the value of a product/service.

- b. It can lower the costs of creating a product/service.
  - c. It can help a brand pivot to new offerings or customers more easily.
  - d. It can ensure everyone loves the brand.
7. If meeting customer needs to ensure their happiness requires conducting business in an unethical, anti-social, or environmentally harmful manner, we should do it anyway. Is this statement true or false?
8. We must strive to understand and focus on the \_\_\_\_\_ to be able to devise overall effective strategies to drive growth for ourselves or for that of our organization.
9. The stage of maximum brand equity is defined by \_\_\_\_\_.
10. A B2B, B2C, or personal brand is likely to follow similar brand journeys, even though they may differ in the timing, target customers, and specific initiatives undertaken. Is this statement true or false?

## Answers

1. Brand equity

2. A

3. 1

4. False

Any entity has a brand, reflecting the perception its target audience has about it. The success of the business depends on that perception.

5. False

A business may not need a Facebook account for a host of reasons, including its stage of brand journey, and the nature of its business and target customers.

If on Facebook, while regular posts may help keep the audience engaged, it can also backfire and be more harmful than occasional posts if most of the posts are unrelated, uninteresting or incoherent with the brand's core messaging – all of which could be due to limited or uninformed resources managing the channel.

6. A, B, and C

7. False

While such behavior is strongly advised against from a “corporate social responsibility” perspective, it is also bad for business. Such activities can seriously dent a brand’s credibility and also prove costly enough in terms of bad press to negate all prior investment, necessitating an uphill battle to gain customer trust that can take years, if at all.

8. Brand journey

9. Brand resonance

10. True

## CHAPTER 2

# A Typical Brand Journey

As we dive into this chapter, the first thing to remember is that whether you are trying to build a personal brand or an organizational one; the foundations remain the same because they deal with the progression of the human psyche. Only, in case of the personal brand, the primary organization or product being branded is you. So, what would Una's brand journey look like?

### Structure

In this chapter, we will discuss the following topics:

- Understanding your brand's journey
- The 6 stages of a brand journey:
  - Identity
  - Awareness
  - Credibility
  - Engagement
  - Receptivity
  - Resonance

### Objectives

This chapter summarizes the steps involved in maximizing your brand equity. The chapters in [sections 2](#) to [4](#) will follow these steps one by one, diving into how each is executed with traditional approaches and modern techniques. By the end of this chapter, you will be able to understand your brand's customer journey and identify the stages involved in a brand journey that can be delineated in terms of its customer evolution.

## 2.1 Understanding your brand's journey

In [Chapter 1, The Importance of Brand Equity](#), we learned that maximum brand equity is usually represented by the state of brand resonance. That stage is the culmination of an evolutionary journey of an increasing liking that a customer develops towards a brand. This book is structured to follow that journey and will bring us to ponder over the concept of resonance towards the end. The question we need to deal with now is which stages does a brand typically go through *enroute* to that final destination.

A brand journey exists in the mind of your customer and progresses through his/her development from a potential prospect to a paying customer to a fan. Just the way Una's bakery customers would purchase products from it, her personal brand's customers may do the same - whether in literally buying from her, paying her for her services as a contractor (or employee), or investing their time (and money) by subscribing to what she offers. Even as an employee, you inevitably carry a brand in the minds of your employer who is procuring your services, and your pay reflects the value they attach with your brand. That brand is built on both the tangible products or services you offer (in terms of its quality, importance, exclusivity, etc.) and the intangible offering (that is, collateral benefits) and likeness that you develop in the eyes of your colleagues. As this book progresses, try to keep this lens on for the brand you are trying to create - personal or not.

A brand journey essentially entails the following process: a customer first discovers the brand, passively and actively analyses whether it is worth giving a try, engages with the brand once she is positively convinced, and becomes a permanent customer if the experience has been great. A customer's love for the brand will depend on the degree to which the brand consistently surpasses her expectations. That, though, is the story from a customer's perspective. What happens on the other side?

Try answering the following three questions:

- Where is your organization in its brand journey?
- Which aspect of the brand journey is a given marketing initiative helping address?
- Are other areas of marketing, sales, and customer success aligned with your understanding of where your brand is at and where it is headed to?

Given our expertise or preference, most of us have a tendency to focus more on one of marketing, sales or customer success – and often underappreciate



the rest. We often forget that at the end of the day, the customer is one entity - either an individual or a team. Remember, consistency is key in customer experience! It doesn't help to create a brand image that depicts comfort and warmth for the customer if the sales team is too pushy, or for the sellers to speak of integrity if the marketers in the other room are spamming the customer. It also does not help if marketers and sellers devise a rigorous strategy to win a customer who then, because of poor service, leaves a bad review for others to see. Even who you engage with, how you treat them, and what channels you show up on have a tremendous impact, as seen in the hypothetical McDonald's example. This is why Una has to set up suitable customer-facing processes at an early stage and keep her staff aligned as her brand grows. For that, she needs to plan her brand journey.

## [2.2 The 6 stages of a brand journey](#)

Let's recap the situation facing Una and her new bakery. An expert in baked goods that both look and taste uniquely delectable, Una has decided to open a bakery that would not only cater to individuals but also potentially to institutions. This makes her business both **business-to-customer (B2C)** and **business-to-business (B2B)**. The genesis of her business, of course, is her own expertise. Una knows this and understands that she will need a personal brand to reflect her own culinary skills.

From an execution point of view, a brand journey can be viewed in 6 stages, delineated in terms of its customer evolution as per the process described earlier. They are as follows:

1. Formulating a brand identity
2. Increasing brand awareness
3. Building brand credibility
4. Enabling brand engagement
5. Ensuring brand receptivity
6. Achieving brand resonance

Not all customers are likely to go through these stages at the same pace. Some will be significantly quicker, while few, exceptionally late. However, the customer's motives and experience at a given stage will be the same. Una's initiatives have to respect this in order to nurture that customer to the

next stage. In a growing business, AI can help here by automating part of the process and allowing early access to analytical insights for the business to take relevant actions. We will look at more on this later. The shift of consumers online has also impacted the traditional brand journey in a profound manner. To understand this, it's time to take a closer look at these stages.

## **2.2.1 Brand identity**

We start by first defining a brand. That means giving it an identity that our target audience will first hear or see when they come across the name - company, product, or person. It is this identity that will enable the audience to instantly form a subtle perception about the brand. The tough part, here, is the frontend of this process. It deals with deciding the target audience, what they like or need that the brand will fulfil, and how to communicate that accurately and effectively through its many elements.

If Una opened a bakery, she would need some idea of what her bakery will be like and who her customers will be. From the logo to the decor to the words that describe it, this brand identity is based on a number of factors that we will discuss later in the book. But all these elements are defined by Una's choice of audience and the value she is trying to impart to it. It is an exciting but extremely sensitive stage where traditional approaches continue to inform the identity but today, also require parameters like SEO friendliness and discoverability to be considered. In fact, this stage is reliant on having a strong understanding of the motivations and behaviors of different types of potential customers out there, which requires more than manual study.

Brand identity is not the stage where Una starts active promotional and selling strategies. Some degree of promotion and selling naturally occur, in particular for the *early adopters*. These are the first 2-10% of the overall customer base who love to experiment and are likely to enter Una's shop the moment they see a new bakery in the neighborhood. These are the explorers out to try new things and willing to engage with unknown brands. It does not mean that this early group didn't have to go through the other stages of the brand journey; just that they needed less effort and were quicker to transition through those stages. As for the bulk of Una's target audience, they are busy and distracted, with too many things vying for their attention. Chances are

that this majority will forget about Una's brand within a few moments of coming across it.

The early adopters have a dual role in the brand journey. On one hand, they will play a crucial influencer role by creating the first perception around Una's brand, through online reviews or word-of-mouth. On the other hand, they will play an even greater role in brand co-creation. That is because their engagement experience and feedback will allow Una to test the waters and validate her intended brand identity and whether it needs changes. This is why brands today have a “*soft announcement*” before the “*mega announcement*”; an intermittent period that allows them to weigh in the initial response and adjust strategies. This is also the period where brands build anticipation, by “*leaking*” information, being selectively secretive about “*something new coming to town*”, or even actively engaging a group of product experts, or users to gather feedback and their buy-ins by involving them in the process of brand identity creation.

The approach to involve early adopters or influencers in the creation process makes them feel like they have a personal stake in the brand, which is great news. It is what Berlin-based *Michael Sleb* did when he and his partners set out to launch their company, Type Studio ([1](#)). Tired of the conventional video editing process, they decided to develop an easier way to edit videos. Closer to its launch, they involved content creators and marketers from around the globe, including the authors of this book, to validate their approach and provide insights to what makes for a great UI and functionality. By the time Type Studio was launched, the company had already made significant inroads into the next stage of the brand journey.

### **2.2.2 Brand awareness**

Have you heard of *Joseph Frank Keaton*? What about *Buster Keaton*? One is the actual name, the other his more affectionate brand. And yet, when it comes to awareness, both pale in comparison to the brand that is *Charlie Chaplin*.

*Buster Keaton* was phenomenal in his comic stunts and just as entertaining as *Charlie Chaplin*. When you look at his videos on YouTube, you will instantly begin to draw parallels between the two artists. Yet, until this very moment, you may not have been as “*aware*” of the *Buster Keaton* brand. In

the branding world, true awareness runs deeper and on two levels: recognition and recall.

In this second stage, Una will have to build her brand's awareness among her target audience to a point beyond simply being visible – a point, specifically, of instant recognition and recall. In other words, people would be considered truly aware of Una or her bakery if they no longer needed to cross the bakery or look at its advertisement to remember it. This phase is important because a customer cannot feel anything about a brand unless she is at least aware of its existence. But that's the obvious part. The bigger reason is that the customer's decision to trust and engage with the brand will most likely occur away from the brand itself – at her home or in a different situation entirely. To pass, the brand has to manage to be at the forefront of her consideration in that instance. How do recognition and recall guarantee this?

### **2.2.2.1 Brand recognition**

Recognition is the first stage of brand awareness and occurs when a prospective customer starts to recognize your brand every time he or she reads, hears, or sees it. Even if you have viewed a video of *Buster Keaton*, assuming you like it, you may not recognize him if you saw his face in a different situation. That will require more than one instance of exposure. That is why “*love at first sight*” is such a rarity. Then again, if you do not like Buster's video, the recognition you eventually develop may be negative.

In Una's case, if hearing her or her bakery's name is enough for a person to know exactly what her brand is about, that is good recognition. The word “*exactly*” is key here. How accurately people understand a brand is a great test of how well aware they are, and how effective Una's initiatives are in keeping with her intended brand identity.

### **2.2.2.2 Brand recall**

Recall is when a prospective customer starts to remember your brand in a certain context even when he or she cannot see, read, or hear it at that moment. This would imply a conversation where, if asked to list the best bakers or bakeries in the area, a person is able to recount Una or Una's bakery. “*Context*” here is key. A brand can have good recall but in poor context. We all remember Enron today, but in the context of scandal and

corruption. Una would not want someone to recall her bakery as “*the one that looks rather dingy from the outside*”.

In both aspects of recognition and recall, *Charlie Chaplin* is exemplary. Most of us know exactly who he is, the emotion it invokes and what the name represents. Both *Mr. Chaplin* and *Mr. Keaton* were exceptional talents; yet the general awareness levels of these two celebrity brands have been wildly different. That may not necessarily be a bad thing if Mr. Keaton’s audience were different and more specific than Mr. Chaplin’s, and he had built great awareness in that specific audience group.

### **2.2.3 Brand credibility**

Let us now talk about brand credibility. Context and a general “*feeling*” about the brand are crucial from its early stages. Once the audience starts to recognize and recall your brand, they will invariably associate it with a feeling. That feeling should be positive and ideally in the context that you want. Remember the adage “*people remember you not by what you did but by how you made them feel*”. As we will see in [Chapter 11, Brand Credibility](#), the emotional element should always be front of mind when managing the brand. But at this point, the modern era marketing departs from the norm.

Traditionally, brand engagement has preceded brand credibility. Naturally, one typically gains trust in a brand after having interacted with it following an initial positive perception build up. However, while still theoretically true, digital channels have changed that process in practice. This is because today, our first step after coming across a new product is to check its online reviews. Given the scarcity of time and attention span we now have, we want a brand qualified before we choose to interact with it.

While Una would want her bakery to look and smell inviting, managing the perceived credibility would require her to also manage her brand’s associations. For instance, Una could be the baker that caters to a 5-star restaurant, or the one that a celebrity frequents. There is a difference between the two, reflected in the kind of strategy Una is playing at and her product positioning. One may appeal to the fine diners while other to the more casual diners who constitute the celebrity’s fan base. We will learn more about these later.

Credibility is also closely tied to context. Customers can trust a brand in certain aspects and not care much in others. Consider the global automaker Volkswagen that, in September 2015, was found by the Environmental Protection Agency (EPA) to have built a defeat device in its diesel engine that allowed the car to show lower emissions during lab tests than when it was on the road. (2) The news hit the Volkswagen brand hard, causing investor lawsuits, customer mistrust, and reduced sales for its car dealers. In 2020, the company stated that the scandal was expected to cost the company over \$30 billion in fines and settlements, likely running into 2021! (3) That same year, an annual audit by *Break Free from Plastic* found Coca Cola to have been one of the world's worst polluters for the third year in a row, having made “zero progress” on reducing plastic waste. (4) Yet, the company's brand value had steadily grown in this time from US\$78.14 billion in 2017 to US\$84.02 billion in 2020. (5)

How can a population that is growing increasingly conscious about the environment be accepting of one of the worst offenders and not of the other? The difference is a matter of credibility, determined here by two factors: consumer priority and expectation. Environmental concern may not feature as priority in a consumer's mind when she is looking to enjoy a bottle of cola, but it certainly does when she is buying a car touted as environmentally-friendly. Secondly, she is making a conscious choice to use plastic when drinking Coke out of that bottle, but when buying a car, she has to blindly trust the brand and the emission-testers to be accurate on the car's eco-friendliness. In other words, there is nothing environmentally unknown to expect and trust with regards to one's priority in case of Coca Cola, besides the contents of the drink. However, there certainly is in the case of Volkswagen, and any falsification can diminish the credibility and cost the brand dearly.

### **2.2.4 Brand engagement**

We learned that credibility precedes engagement in the era of AI. To picture it accurately, we should imagine the two in a loop, continuously relying on, and reinforcing, each other. Engagement refers to the customer's interaction with your brand. For Una, this would involve a shopper strolling around her bakery, exploring her breads, and ideally, purchasing one. While Una's engagement with her audience had already started much earlier, likely

through online channels, her website, etc., their engagement with Una and her brand begins once they deem her bakes worthy of their time and trial. This implies a customer's willingness to talk to her and experience her offering. This is where a customer's intention to purchase or experience her product/service sets in.

Una's job at this point is to ensure the pieces are in place to facilitate that purchase. She's chosen the right bait, hooked it, applied the technique, and waited for the right moment. Now, it's time to catch the fish that arrives. If pricing and product availability is in place to support the customer's intent, Una has her customer.

Engagement is what you experience when Prada gives out free perfume testers or allows a sniff in stores. It is also where companies can go wrong if they try to force engagement upon customers. Think about kiosks in shopping malls where the reps are waiting to catch you and indulge you in a discussion as you are passing by. Not exactly the most pleasant experience, is it?

Experience is where Dell had originally stolen the show. The company introduced an engaging and personal purchase experience where customers could customize their laptops the way they wanted to. That was a first in an age when laptop configurations were fixed, and desktops could be assembled by bringing parts from different manufacturers. The impact showed in Dell's growth.

Una's engagements could also involve a baking enthusiast subscribing to her baking channel, or a restaurant agreeing to try baked supplies. We all know that establishing the brand identity takes creativity. Building its awareness through various promotional mechanisms requires it too. But few realize that the same is true for engagement. This is because creating situations or reasons to actively engage is about choosing the right channels and partnerships, and that takes strategic creativity as we will see in [Chapter 12, Brand Engagement](#). Some of the best marketers understand this and it's useful across B2B, B2C, and personal branding, particularly when you do not have direct access to customers.

## **2.2.5 Brand receptivity**

Say, you have won your customer. She has experienced the product and likes it. Now is the time to think about turning her into a repeat, loyal customer.

Loyalty has two stages. Brand receptivity deals with the first, which is based on the customer's experience engaging with you. Does the brand listen to its customers? Is it responsive?

Receptivity is the stage achieved by the most popular guy in a room – someone others enjoy interacting with. Una's product or service does not have to be perfect, but the experience must. That involves her receptivity and action on the audience's or customer's feedback. This is her chance to show that she cares and make the customer feel valued. Now, many of us see feedback as an act of improvement. But subconsciously, there is something else the customers are doing in this stage; particularly, if they like Una's brand. They are testing it – checking whether it is worth committing to and worth introducing to their friends.

The similarity to our experience with a boyfriend or girlfriend is no surprise. As mentioned earlier, brands play in the psyche. And elements of trust and loyalty are quite personal to us. But there is a simple reason why loyalty is not the final stage a brand enjoys. That is because loyalty can also be a result of convenience or material benefits rather than something emotional. When *Sir Keith Mills* created Air Miles, (6) he redefined the benefits of flying and rules of customer retention for airlines, and eventually, for other industries. Customers bought into the idea because it offered them rewards for no added investment, if only they remained loyal to partners offering air miles.

## **2.2.6 Brand resonance**

Lastly and most importantly, “*resonance*”: our goal. This second stage of loyalty deals with achieving fandom. It is a sentimental state. A truly successful brand is one that customers come to identify themselves with.

Resonance is the most elusive stage because you cannot buy it or create it through instant creativity. Once achieved, it is also incredibly difficult to diminish. Brand resonance is what cults enjoy. It is at this point that any attack on the brand becomes an attack on its customers' identity. Any brand or individual that you have heard someone defend at the drop of a hat has managed to build resonance with that individual. Think Gandhi or Hitler. Throughout history, there are examples of both good and evil that have leveraged resonance to great effect. For Una, resonance would imply a stage where her customers defend her bakes as the “best”, scoff at the idea of



another bakery being called better and feel a sense of pride on being her customer because it reflects their good taste.

It is also important to remember that a brand cannot please all its customers. Most brands manage to reach the stage of resonance by focusing on a specific audience group that they can most directly appeal to. This is why the initial choice of a target audience that the brand is most likely to resonate with is so important.

For example, Una may prefer to keep her bakery focused on the wealthy segment, which would influence the location she opens the store in, the cutlery and decor in place, the hotels she partners with, and of course, the price. However, if the only place Una can afford is in a less affluent neighborhood, Una will need to adjust her strategy or the audience she caters to as well, depending on where she is willing to be more flexible and drive growth. This is why some of the best personalities or companies are ones that manage to stay true to their character and to keep that perception going, no matter what. It is also why resonance is best achieved among people who value you for your true and natural essence.

There are more non-commercial entities that have achieved resonance than commercial ones – in itself showing the non-transactional nature of this stage. The list does include Apple, Harley Davidson, American Girl, and Nestle Maggi, to name a few bigger ones. There are also many smaller and unknown players who have achieved this feat, even if among relatively fewer customers. All have managed to satisfy one or more of a few key conditions that are crucial to achieving resonance. We will learn these in [Chapter 16, Brand Resonance](#).

## **2.3 Conclusion**

The path to maximizing brand equity is long and takes time. In this chapter, we learned about the steps a brand must take to reach its peak. The stages discussed in this chapter help create a foundation for a brand that its audience will eventually love. These stages help the audience to:

1. **Identify** with the brand's promise and value when they first come across it.
2. Become positively **aware** of it by being able to recognize and recall it.

3. Associate a trusting feeling with it, allowing the brand to gain **credibility**.
4. Develop intent to **engage** with the brand and try it out.
5. Grow fond of the brand, and turn loyal, through a great customer experience and **receptivity**.
6. Become a fan once the brand **resonates** with them, so much that they would defend it at the drop of a hat!

These stages make for quite an arduous journey and patient execution. If we bring organizational growth into the equation, each stage mandates managing an ever-increasing audience over time. More importantly, as we will see in subsequent chapters, the initiatives involved in each stage cannot be the prerogative of one function alone. As a result, organizational brand equity requires multiple customer-facing functions to work in tandem to maximize it. That is our focus in the next chapter, as we now move from the *what* to the *how* of a brand journey.

## Questions

1. What is the right order of some of the stages of a brand journey listed below?
  - a. Brand engagement
  - b. Brand awareness
  - c. Brand credibility
  - d. Brand resonance
2. Brand identity formulation is the stage where you actively start promotional and selling strategies. Is this statement true or false?
3. Brand identity involves choosing the right \_\_\_\_\_ and the right \_\_\_\_\_ to represent the brand accurately and effectively to them.
4. In the brand awareness stage, the aim is to reach a point of instant \_\_\_\_\_ and \_\_\_\_\_
5. Recognition is achieved when a prospective customer starts to recognize your brand every time he or she reads, hears, or sees it. Is

this statement true or false?

6. A customer either trusts a brand or doesn't. There is no in between. Is this statement true or false?
7. Brand engagement can also require a lot of creativity, particularly in selecting the right channel partners or situations that enable engagement. Is this statement true or false?
8. Brand loyalty is determined by its \_\_\_\_\_, even if it is purely transactional in nature.
9. Arrange these stages by the degree of emotional involvement a customer has with the brand, from most to least.
  - a. Brand awareness
  - b. Brand credibility
  - c. Brand engagement
  - d. Brand resonance
10. A truly successful brand is one that achieves \_\_\_\_\_, which is the stage when customers come to identify themselves with it.

## Answers

1. B > C > A > D
2. False
3. Some promotion and selling may happen among early adopters and it is good to be ready for that, but this is not the stage to actively pursue these.
4. Target customer, Brand elements
5. Recognition and Recall
6. True
7. False.

A customer may trust a brand to provide the product/service he needs even if he doesn't trust certain other aspects of the brand that he finds less important.

8. True
9. Receptivity
10.  $D > B > A > C$
11. Brand resonance

## **CHAPTER 3**

# **The Convergence of Marketing, Sales, and Customer Success**

The main objective of this chapter is to drive home a simple truth: Branding is not the mandate of only brand managers or marketers. In this chapter, we will see how marketing, sales, and customer success today work together to establish and reinforce an organization's brand. It is important to digest this knowledge before we dive into the techniques and technologies used in these fields because it can not only allow each function to be more effective, but also allow you to grow in your career and shape the growth trajectory of your organization suitably.

### **Structure**

In this chapter, we will discuss the following topics:

- Interconnection between sales, marketing, and customer success
- Marketing as a human function
- Roles in a brand journey
  - Marketing
  - Sales
  - Customer success

### **Objectives**

This chapter attempts to paint a clearer picture of how the different customer-facing functions interact and work together to execute a brand journey. By the end of this chapter, you will be able to understand how marketing, sales, and customer success overlap and are connected to one another, picture marketing as a human function, and recap the tenets of a brand journey in that lens.

### **3.1 Interconnection between marketing, sales, and customer success**

It is easy to see marketing, sales, and customer success as a linear journey where one comes after the other. Marketing procures and nurtures leads; thanks to the contextual awareness and favorable image it creates for the brand; sales converts them into paying customers; and customer success (or service) keeps them happy. We could also view it as a cycle where happy customers refer and influence other leads back to the company, while they re-enter the cycle for a potential upsell or cross-sell. Even the data coming in from customer interaction can inform the marketers to adjust their lead strategies. However, even this cycle is a linear flow of tasks, where one function comes after the other. In reality, the three functions tend to overlap, with all three having to pitch in more and more as we move to the later stages of a customer's brand journey.

To understand the interconnection better, let us step back for a moment and understand the ecosystem of customer-facing functions itself. The idea of marketing is essentially a human condition, necessitated at most times by our social existence. For instance, every moment we put forth a certain image of ours – from the clothes we wear, to how we converse, to things we do; we are essentially marketing our brand. When we praise our favorite hockey team, we are marketing it. Even when we do something for a sense of justification, we are in some ways marketing our nature to ourselves.

Given the inevitability of a brand journey for any entity, understanding the nature and value of that product or service is therefore crucial. It is both followed and fed by market research and analytics, trickling on to researching the potential consumers. Therein lies the 1<sup>st</sup> tier of our strategy. It involves segmenting potential customers into distinct groups and targeting one or more of them. We then have to think about how we can differentiate ourselves from our competitors for these target groups, and accordingly position our product/service in their minds.

That last one is where we venture into creating and defining the brand itself. And that acts as the short bridge to the 2<sup>nd</sup> tier of our strategy: the marketing mix. That includes finalizing the details of the product we eventually sell (its variations, packaging, etc.), places where we can reach our target customers (generally, covered by Channel marketing), and pricing (which ranges

between the highest amount our target customers are willing to spend for our brand, and the lowest amount we are willing to accept). Promotion (often confused with the word *marketing* itself) includes e-marketing, the traditional print/radio/TV and that elusive angel of any marketer – word-of-mouth publicity.

This is also where sales engagements start to come into the picture. It closely follows, and at times also goes hand-in-hand, with active promotions because in many businesses (particularly, B2C), a sale can occur instantly at that time. B2B sales, on the other hand, is generally more consultative and requires a regular reinforcing dose of promotional content and account-based marketing while the accounts are being nurtured by the sales team. This period can take anywhere from a week to two years. We have even been involved in sales cycles that have stretched three years!

Nonetheless, if we try to map this journey, this is how it looks like:



*Figure 3.1: The flow of customer-facing functions*

### **3.2 Marketing as a human function**

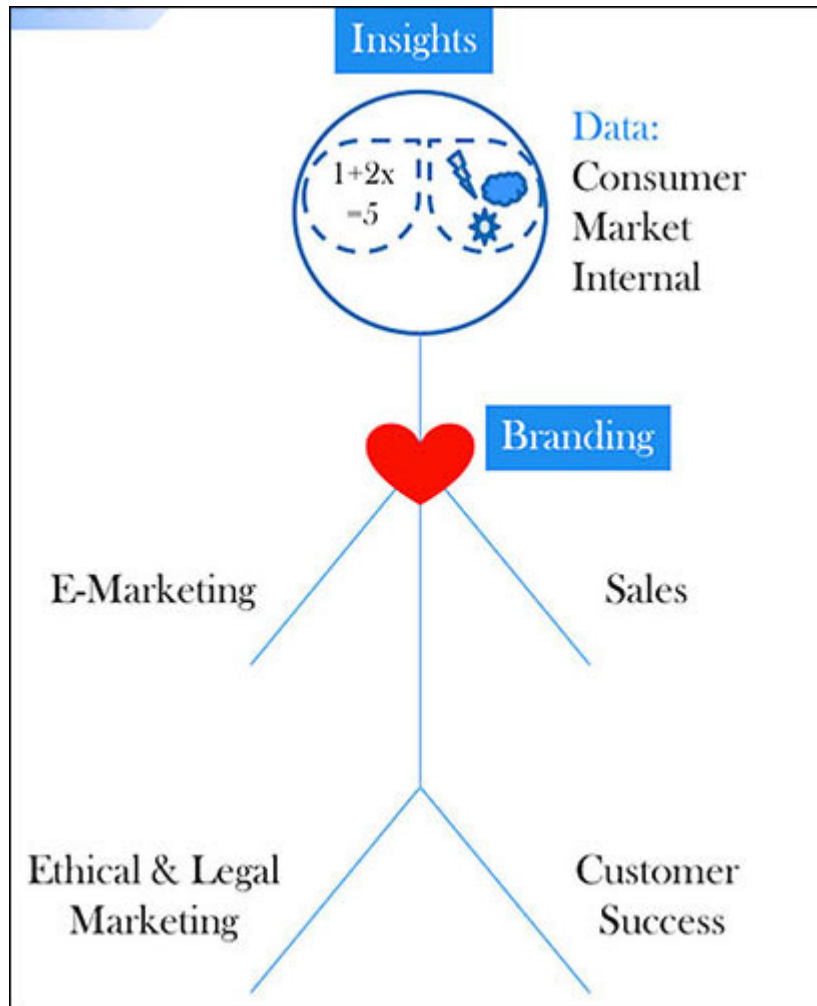
As seen in [Figure 3.1](#), corrective gatekeepers offering feedback to improve this entire flow are essential to close the loop between sales and validation. That is where elements of legal, ethical, or green marketing come in. They act as internal police, thus ensuring that the teams in this ecosystem execute

their function in a socially, legally, ethically, and environmentally responsible manner. As discussed earlier, it is crucial both to stay on track and to avoid any unnecessary and irreversible damage to the brand. Customer success, meanwhile, is more outward facing as it manages and grows the customer relationship, thus playing a crucial role on the following three fronts:

- It validates the market and target customer assumptions made at the beginning of the loop.
- It confirms the success or failure of the intended brand identity and positioning by revealing how customers are really perceiving the brand.
- It reinforces the authenticity of the brand to its customer. Remember that the customers at this stage are testing the brand to see if it's really worth committing to. Customer success is at the frontline to provide that assurance.

Now, if we look at it closely, we will find that everything in this journey is designed to inform and get informed by two overarching entities: the brand and the consumer. In the spirit of marketing being a human function, let us simplify things with an alternate visualization:





**Figure 3.2:** *The human ecosystem of customer-facing functions*

A brand is at the very heart of any marketing approach connected in a continuous feedback loop with the brain that processes consumer and market data. This is where we get our insights and rebuild our Tier I strategy of finalizing the target customers and our positioning to them. And just the way we have a calculative left brain and a creative right brain, the marketing brain has two sides too. One is quantitative, measurable, and visible – often utilized through secondary research and surveys. Think age, gender, consumption amount, impressions, click-through rates in online ads, etc. The other side is subtle, invisible, and accessed through observation and psychographic analysis – Tribes, behaviors, preferences, habits, cultures, etc. *Prof. Erin Meyer* deals brilliantly with a part of such cultural influence in her book, *The Culture Map*. (1) Anything from our in-person interactions, to focus groups, to sentiment analysis comes handy here to gauge what may

influence our customers. It is this holistic analysis that has led companies to increase the mouth size of our toothpaste tubes and has pushed product prices down a cent to \$9.99 instead of \$10 around the world (to make us process the price as "\$9-something", in single-digit and therefore, low.)!

Without the two types of data, what we know about a business, or its customer is often deceptively insufficient and inaccurate and can lead companies to lose significant dollars of investment in trying to win the market. This is why all analysis, insight gathering, and corresponding actions are heavily reliant today on advanced technologies, including AI, as we will see in the next chapter.

Online and offline channels of marketing and sales serve as the two arms of any brand, determining and executing the marketing mix. As you can see, digital marketing forms only a part of this customer ecosystem. The reason it is omnipresent today is because most of our tasks have gone digital. So even though Una may not rely solely on promoting the brand online, most of her work will be done digitally. Digitization is important not only because of convenience but also because it enables easier and wider procurement of data for analysis. A good example would be the use of a **customer relationship management (CRM)** system to act as Una's main database and foundational source of data for most analytical tools she uses. We will discuss these in [\*Chapter 10: Operational Alignment and Automation\*](#) in [\*Section 3: Winning the Customers\*](#).

The legs on which the ecosystem stands consist of two pillars: one is that of legal, social, environmental, and ethical standards. They are the reason you are not an open book all over the internet already. They are also what keep you from straying away in pursuit of business gains, like so many others have. And as companies eventually realized, in a world where your audience is increasingly sensitive to these standards, upholding them adds a great impetus to your brand value.

The other "leg" is that of customer success, which is the reason your customers stay, and your business grows. If we focus on acquiring customers, while steadily losing them at the other end, all other effort goes in vain. Likewise, if we focus on acquiring customers and serving them well, but do so in an unethical or illegal manner, both existing and prospective customers will go away because of moral conflict or administrative actions. An illegal

action today can be something as simple as the use of customer-related data without their explicit consent and outside the bounds of privacy laws.

To conclude, even though everything from inaccurate branding to poor marketing and sales execution can affect a business' revenues and growth, it may still manage to stand as long as the legs are working properly. Without strong legs, things start to wobble. There are plenty of examples for us to see around. Consider the extreme fate of two IT consulting firms that were launched in the 80's: Satyam Computer Services and Infosys. The former brand met its demise in 2009 when news of a nearly US\$1 billion scam broke out. The company was India's fourth largest IT company at the time. Its chairman *Ramalinga Raju* famously said that he was riding a tiger and did not know how to get off without being eaten. (2). And it had all started off so simply, so small and so much more harmless. That, in a nutshell, is the irreversible trap of papering over cracks in either "leg". Infosys, on the other hand, started with an initial capital of US\$250 in 1981, (3) barely saw enough growth in its first 10 years but today enjoys over US\$12 billion in revenue. (4). Infosys founder *Narayan Murthy* underlined the synergy between values and business in a 2006 India Today interview when he shared that the cofounders had decided from the very beginning to "*do the right thing by the stakeholders*" and profits would come. On the question of whether they would have grown faster had they not followed an ethical path, his clear answer was no. His co-founder *Nandan Nilekani* was quick to add that "*being ethical reduces transaction costs. Customers, investors, employees believe you will deliver. Trust reduces transaction costs.*" (5).

Why is the issue of standards and customer success so important? It is because on a day-to-day basis, these issues and their impact are generally only discussed in financial terms. Consequently, if the numerical impact on the financial books looks small, the true impact is never investigated by the organization. The issue of poor customer success or poor standards seeps into the system and infects a brand but does so invisibly at first and irreversibly later. As discussed earlier, an organization never hears the hushed tones of customer discontent or brand disapproval until it grows big enough, much like an actual infection. This is why those in-charge of branding have to keep a close eye on how customers (and employees) are being treated and if there are potential risks that can damage the brand's reputation. Most organizations that have been successful went through years

of slow or no growth as a start-up. But unlike most other start-ups, they survived mainly because any customer they acquired, stayed, and their business approach ensured it.

### **3.3 Roles in a brand journey**

While the human-like ecosystem of a brand journey shows how connected and interdependent marketing, sales, and customer success are, how and where do they overlap? And how do they support the different stages of a brand journey? To understand this, let us go back to a brand's evolutionary route.

#### **3.3.1 Marketing**

The first role of marketing is to create a robust brand identity, with maximum potential to achieve the eventual resonance. This identity provides the lens for every initiative marketing takes. As a foundation – the root – of a brand, any cracks in the identity will weaken the brand as well as the impact any initiative has on its customers. That is why it takes consumer and market research to validate the potential demand for an offering and its growth potential. Marketers also ponder over how to differentiate the offering from competition and accurately communicate its value to the target audience.

Brand visibility and positive awareness is also a matter of good marketing initiatives, of course. Marketing also plays an important role in the brand credibility stage to establish a strong perception of trustworthiness, which determines whether a person decides to engage with the brand.

Typically, the transition point comes around the credibility stage, as marketers hone in on the interested potential customers, nurture them, and facilitate their first engagement with the brand. They do this by guiding the sales team, which determines how the company tries to sell its product or services to the customers. For instance, in case of simple missionary sales, the sales professionals will have to adhere to the brand perception the company wants to create in order to remain credible in all their communication and engagement with the lead. The exact approach will also be applicable in case of personal branding.

Think about the stores at Disneyworld: If the shopkeepers there aren't purposely jovial and upbeat, the hard-earned facade of a cheerful, happy

place will quickly fade away in the minds of the visitors. Likewise, if Una decided that her bakery spells a certain class and elegance, her own demeanor and selling strategies would have to reflect that. Her bakes would also need to stay away from budget grocery stores.

While marketing finds itself more sidelined in the latter stages, it comes back to share the stage during the last part of the journey – brand resonance. This team has the power to modify and strengthen the roots of a brand if needed – a crucial ingredient for resonance. And even though existing customers are managed by customer success teams to generate loyalty, marketing provides the ammunition to turn them into fans.

### **3.3.2 Sales**

Sales can feature quite early in a brand's awareness building stage. For instance, an online advertisement released to announce Una's new pancake designs may also come with discount coupons that can lure first-time customers. However, active selling starts to become important during the brand credibility building stage, as discussed earlier. That said, while this stage has traditionally been when customers would start engaging with the brand, the scenario is fast changing. Given the digital and AI shift, active selling remains in the shadows of marketing as the latter has to ensure the brand passes through the initial qualification a customer does remotely.

Nonetheless, active selling has a quicker and shorter role in B2C and a much longer role in B2B cycles. This is not necessarily the time to sell, but to frame the selling strategies and its supporting operations.

Brand engagement is where sales truly come front and center, directly or indirectly. Not all products require active in-person selling. For her B2C business, Una does not need to visit or call every prospective customer to get them to come to the store. She may, however, strategically choose channels that allow engagement with them outside her store. However, for her B2B business, Una will have to meet restaurant owners to get herself a supplier deal. For her personal brand, it can go either way depending on the type of product and customer. For instance, Una's personal brand on her Instagram account does not require any prolonged sales-engagement, but her reach out to potential influencers or channels would. Nonetheless, in both cases, the audience will have to be sold on subscribing to her channel, partnering with

it, featuring it, or purchasing her offerings. We will see this in more detail later in the book.

Where most companies miss the beat is in appreciating the role of sales in the brand receptivity stage. How many times have you come across a purchase experience where you spoke to one person while buying the product but could no longer reach him or her and were directed to customer care for all subsequent questions? Did that leave you feeling good about the company? The idea here is not to have sales professionals support customers as well. That is not practical. But just like with any human emotion, the transference of a customer from one face-of-the-company he is engaging with, to another, needs to be smooth and not abrupt. That transition has to be gradual. It shows sensitivity and thoughtfulness on part of the company and customers love it.

Finally, sales is engaged in the final step of achieving brand resonance too as this stage is all about repeat customers and their referrals to new prospects, which create active selling opportunities. The latter cannot betray the experience the existing customers have been raving about, and sales has to be very cognizant of that fact.

### **3.3.3 Customer success**

For an established brand with paying customers, customer success provides key information to validate or revise the brand identity, by advising marketers on the actual identity the brand has in the minds of both the prospects and the customers. These teams can also inform marketers on the desired value that prospects, or customers crave, thereby serving the essential ingredient to revisit initial assumptions about the customer and the market, and course-correct.

Brand credibility is also bolstered by the customer success teams, but that usually falls under the purview of brand receptivity – the stage of reinforcing authenticity and whether the brand really is about whatever it has so far claimed to be. The online reviews from early adopters that the customer success teams gather influence other prospects who follow in adopting the brand.

Brand receptivity is where customer success does truly set in. This is its core task. Even in the absence of sales at this stage, a good customer success setup

can ensure that the customer doesn't mind the change in who they are engaging with. It's easier said than done without at least some overlap of both functions though. Nonetheless, customer success helps the customer come on board and voice their questions or concerns. This stage is also where marketing once again starts to assume importance. Listening to what the customer is saying and sharing that insight is key for the colleagues in marketing to understand the kind of brand perception they have built, and whether it needs tweaking.

This finally brings us to the crown jewel of customer success initiatives: building brand resonance. It is this stage that all three functions share for different reasons. Customer success is about keeping the existing and new customers hooked and contributing to the increasing base of fans.

There is a difference between a customer who is happy and one who is a fan. For Una, there is also a difference between a restaurant that is happy with her supplies and one that proudly flaunts it to its customers. Even personally, it is one thing to have thousands of followers on social media and quite another to have them wait with bated breath for Una's next great bake. That added step requires a perfectly consistent brand experience for the customers and adherence on part of Una, on some front or the other. It also requires Una to actively, but not necessarily directly, leverage her customers' loyalty.

As we will see later in the book, the motivation behind a customer achieving brand resonance is different in B2B and B2C – whether the brand is an organization or person. Nonetheless, both eventually come down to the passion Una's brand generates on a personal level. You cannot ask the restaurant to flaunt your brand, but the restaurant will do it if it helps attract customers. To achieve this, all three functions must go hand-in-hand, thereby converging the trio into one entity. This should explain why so few brands are able to achieve brand resonance.

### **3.4 Conclusion**

Marketing, sales, and customer success teams today tend to work in silos. Efforts to align them help with productivity but can still be blind to the way they overlap. That requires keeping a branding lens on and viewing the initiatives undertaken by these teams in the context of a brand journey.

At the end of the day, the entire ecosystem of customer-facing functions can be viewed in a human form, where the brand sits at the very heart of the image. The brain constitutes the quantitative and qualitative data that continuously come in from internal and external sources, thus informing and shaping the organizational strategy. Online and offline channels of promotion and selling are the hands that ensure performance of the entire ecosystem, but it is the legs that ensure its sustainability. These legs are the social, legal, ethical, and environmental standards that the organization must adhere to, and an effective and brand-compliant customer success team which ensures that customers who come in, stay with the brand.

All along the brand journey, the three broad teams perform varying roles, with the primary responsibility moving from marketing to sales to customer success in only a generic way at best. Regardless of the primary player, the other two teams have to play a supportive role at each stage of brand development. At the eventual resonance stage, where marketing comes back to the fore, all three teams fuse together in terms of their impact and role in the mind of a customer.

In our digital age laden with rich data, the modern-day brand journey is more advanced than its former self in two crucial ways; it plays out deeper than ever in the minds of the customer and a large portion of its execution is automated. All that is possible, thanks to AI. In the next chapter, we will trace the evolution of marketing and arrive in the modern era with an introduction to AI that will guide its execution over the next 3 sections of the book.

## Questions

1. Market and customer analysis is needed to validate the offering and define the brand identity, but not after the validation and identity formulation is already done. Is this statement true or false?
2. Which of the following statements are true about the interconnection of marketing, sales, and customer success:
  - a. Customer success and ethical marketing are like our legs: They both support the customer-facing functions, and a flaw in either can be crippling.



- b. Sales and e-marketing are like our hands: The one we predominantly use to acquire customers is based on our comfort.
  - c. Data and insights are the brain while the brand itself is the heart of a customer-facing ecosystem. However, unlike in the real-world, it is the brain that informs the heart and makes it stronger.
3. Once certain data reliably points to a conclusion, new incoming data will not change that conclusion as long as the earlier data holds true. Is this statement true or false?
  4. At which of the following stages of a brand journey does marketing come into play:
    - a. Brand awareness
    - b. Brand credibility
    - c. Brand engagement
    - d. Brand resonance
  5. The 1st tier of our strategy involves segmenting potential customers into distinct groups and targeting one or more of them. Is this statement true or false?
  6. Online and offline channels of marketing and sales serve as the two arms of any brand, executing the \_\_\_\_\_ strategy of determining and executing the marketing mix.
  7. \_\_\_\_\_ starts to become important during the brand credibility building stage
  8. Active selling can play a primary role in the \_\_\_\_\_ phase.
  9. Brand credibility is also influenced at the brand receptivity stage. Is this statement true or false?
  10. Customer success offers feedback on existing customers while marketing taps into their desires to help them reach the resonance stage. Sales is not really involved in this final evolution of a brand. Is this statement true or false?

## Answers

1. False

Such analyses are needed continuously, both before and after the offering validation and brand identity formulation to validate assumptions and the intended impact of the brand, as well as to go back to the drawing board if things change or fail to meet expectations.

2. A and C

3. False

Let's say that data shows that customers at a particular Domino's outlet seem to prefer large pizzas on weekends. New data may show that this is only true because the local team has been playing on Saturdays, and fans come together to watch it on TV while munching on pizzas. However, the team will no longer be playing due to Covid-19 for the foreseeable future. As such, Domino's strategy may have to change going forward despite the accuracy of past data.

4. A, B, C and D

5. True

6. Tier II

7. Active selling

8. Brand Engagement

9. True

10. False

Even with a smaller role, sales is responsible for keeping the brand promise alive with all new customers referred by the existing ones as well any upsells or cross-sells to the existing customers.

## CHAPTER 4

# AI and the Future of Marketing

We saw the interrelated components involved in a typical brand journey. How did it start to be seen in silos? Part of it, of course, is execution focus, and how companies have been designed to operate traditionally. To learn any subject as per its legacy system will only serve to further the distance between what you learn and what the reality is. So, in order to assess and predict where the field of marketing is headed, it is important to understand how the brand journey has evolved, and what factors are driving its future.

### Structure

In this chapter, we will discuss the following topics:

- Evolution of marketing and sales
  - Birth of marketing and sales
  - Evolution of digital marketing
  - The onset of the modern era
- What is AI and why is it important?
- Future of marketing, sales, and customer success
  - Examples of AI-led advances in marketing
  - Issues with AI adoption

### Objective

This chapter traces how marketing has evolved over time and where it is headed. In particular, it throws light on why the field is becoming increasingly reliant on AI, the roadblocks on the way and what it may all mean for this field. By the end of this chapter, you will be able to learn the origin and evolution of marketing and sales, appreciate what AI is and why it

is important, and envision the future of marketing, sales, and customer success in the technology-driven era.

## **4.1 Evolution of marketing and sales**

Everything evolves. As they say, change is the only constant. The same is true for the technique of acquiring a *customer*, which is someone who buys into an idea or offering we are trying to sell. Even the currency utilized to achieve this has evolved from crops and cattle in the barter system, to coins and cash in more evolved kingdoms. Credit became more widespread and evolved into instalments when a subscription economy came to fruition in the last few decades. Naturally, this has had a direct impact on the customer acquisition approach as well. The trick to predicting the future is to uncover the patterns that exist in historical data. So, how did marketing and sales take their current shape?

### **4.1.1 Birth of marketing and sales**

The fundamental approach to winning customers took hold in ancient times in the form of missionary sales that were part of local trade markets. The birth of marketing, in some ways, happened in the 15<sup>th</sup> century with the *Gutenberg's* invention of movable type, thereby facilitating print advertising through mass printing. It took over a century for printouts to evolve from the first magazine (mid-18<sup>th</sup> century), to posters (early-19<sup>th</sup> century) to finally, billboards (mid-19<sup>th</sup> century). Audio and video were not able to make their entry until the first half of the 20<sup>th</sup> century, with the arrival of radio and TV-based advertising. But when it came, telephone advertising took the market by storm; thanks to its privilege of being the first mode to directly connect with a distant customer.

As you may notice, until this point, marketing and sales were often synonymous. Customer satisfaction started to take a nascent hold in the 20<sup>th</sup> century but largely remained a secret, invisible sauce driving the most successful companies. As early as in 1909, *Henry Ford* had stated, “*No business can improve unless it pays the closest possible attention to complaints and suggestions.*”<sup>(1)</sup> It would take several more decades for others to start paying attention to the value of this field, and longer still for businesses to realize how these functions worked together. But it was our

increased awareness of sales tactics, as well as the provision to purchase goods at third-party retailers, that truly began to change the game, necessitating subtler ways of promotion by companies. This was the beginning of the delinking of marketing and sales.

## **4.1.2 Evolution of digital marketing**

The digital channel was born with the arrival of mobiles and computers. The epic super-bowl commercial from Apple also challenged our imagination. That was the 80s; a decade when the use of printers became possible for everyone, leading to a surge in small business printed ads. But the glory days of readable media would eventually be eclipsed by visual media; thanks to the arrival of 2G in the 90s. Videos are more interesting and quicker to consume, after all.

This is when the approaches started to delineate for different business models. Marketing had started to become largely attuned for B2C models. The B2B space saw creativity and rigor in terms of novel process-oriented and consultative sales strategies used superbly by the likes of behemoths like Xerox.

Where is the internet in all this? In April 1994, Phoenix law firm *Canter & Seigel* spammed by posting a message on several thousand newsgroups. (2). More significant was Yahoo's search engine that had seen a 350% increase in surfing population to 70 million in the US by 1997. What did that lead to in 1998? Google. This period brought analytics to the fore: to understand and produce relevant content to the users. That very year also saw the emergence of blogging.

The internet had quickly descended into a large puddle of excitement, marked by the dot-com bubble burst in 2000. That helped correct expectations and bring in a more organic onset of digital media. For instance, the use of analytics mentioned above truly found prominence only when the dot-com bubble burst. The recessionary fall forced marketers to rethink their communication strategy. This brought in the age of inbound marketing. Unlike the forced-communication approach of outbound techniques, inbound focused more on engagement, discussion, and the feel or experience customers went through, without "*interrupting*" them.

The shift of mindset from outbound to inbound was also aided by the Can-Spam Act of 2003 on the legal front, barring unsolicited emails. The option to opt-out of telemarketing calls came into effect as well. And so, it was at this age of invoking and facilitating natural customer interaction that induced the arrival of social media – with LinkedIn, Myspace, and Facebook. What followed in the following years with the arrival of Twitter, e-commerce, 3G, etc. steadily clouded us all in an online presence. By the end of the first decade of the 21<sup>st</sup> century, TV had finally been overtaken by the internet, which became the darling of a new generation of marketers and customers.

### **4.1.3 The onset of the modern era**

Our interest in social media was due to an unmet need that humans had silently suffered through the years. In an age where our entire social world was limited in geography, finding people or information of common interest and sharing opinions and experiences was difficult. Ask any die-hard Harley Davidson fan, and he/she will tell you why. Social media helped us bypass that limitation.

While analytics had lent a more concrete method to the madness of marketing and sales, it was social media that once again provided a unified channel to use for marketing, sales, and customer success. Consumers - B2C and B2B - now had a way to express their satisfaction (or lack of it) with a product online for others to see. They could also compare competing products more easily.

Social media and the internet in the era of smartphones had another crucial impact on the very nature of customers. The bulk of our audience was now online, distracted, seeking instant gratification, and noticing our every move as a company. With the use of analytics, though, companies could observe the customers just as much. They certainly developed an appetite to do so. And that is where we now come to the present.

A fallout of these developments is how susceptible it has made us to instant gratification. This has had a subtle but profound impact - the shortening of human attention span, down to around 8 seconds – lower than that of a goldfish! (3). A more forgetful and distracted customer has also made the job of marketers far trickier than it has ever been. But with the bulk of that distraction oriented towards the digital world, our behavioral patterns are

also that much easier to map. Consequently, the use of advanced technology is not only a significant boon that helps marketers not be left behind but also a need if they wish to keep up with the customers in the race for their constantly shifting eyeballs. And that brings us to AI.

## 4.2 What is AI and why is it important?

Artificial Intelligence is gradually defining the era we live in; it is nearly omnipresent in our lives both at work and home. The first two books in this series, *Artificial Intelligence for Managers* and *The AI Split*, discuss the technology and its impact across industries, and how to use it successfully and responsibly, in great detail. Nonetheless, to explain modern day marketing, let us brush up on some fundamentals of this technology.

Artificial Intelligence is essentially an advanced computer program designed to allow software to do tasks the way humans would. Specifically, it is designed to perform the following four functions to execute any task:

1. **Sense:** which refers to taking inputs from specific data sources or the environment.
2. **Understand:** which refers to the analysis of those inputs.
3. **Act:** which refers to providing an output based on the analysis.
4. **Learn:** which allows the program to improve with time in its ability to provide better outputs.

There are three points to take note of here. First, the first three tasks are what any computer program is designed to do. Even our calculator takes the numbers we key in, processes them as per the mathematical operator we choose, and provides a result. What sets AI apart is its ability to improve with time by learning from previous errors. Second, machine learning and deep learning, successively the more advanced forms of AI (in that order), tweak this approach. They study the inputs and the corresponding outputs that have occurred historically and develop their own understanding of which inputs lead to which outputs. In other words, step two is automated for these systems. That ties into the third point to understand: the automation of analysis is essentially about finding patterns in how certain inputs lead to certain outputs.

The last point is important because it reveals the central tenet of all AI. The presumption is that there are patterns in everything around us, seen or unseen. Summer always follows spring and occurs around the middle of the year. Too much salt in food generally makes one crave for something to drink. And *Halley's Comet* is seen once every 76 years. Aptly termed “*pattern recognition*”, the concept has been native to humans since prehistoric times. It allowed us to predict weather patterns and enhanced our chances of survival. *Edmond Halley* himself had famously predicted the return of his comet in 1758. (4) With automation, one can effectively boost pattern recognition.

The thing about patterns is that they are generally only visible when you look at a lot of data to be able to spot something recurring. That can be an arduous and time-consuming process if manually undertaken. In an age of distraction, that is often nearly impossible. But cut the task short, and results become inaccurate. That can prove costly, which is also a sin in an age where all companies are obsessed with cutting costs. The other thing to consider is that in the real world, patterns can be found in just about anything. Some may be relevant, while others misleading or incomplete. Any pattern exists among a set of factors. There can be many factors, and innumerable combinations thereof, to study in order to find relevant patterns of what's going on. We cannot possibly study it all. Computers can because they are fast, cheap, and they do not tire.

If Una baked bread only on Saturdays, it could be because that was the only day she got a break from her regular job. Look closer, and it turns out she baked similar breads for 2-3 Saturdays before moving on to another variety. Wonder why! Then again, this pattern only lasted for eight months last year. That's when Una was living in Montmartre. So, perhaps it was the artistic influence of this Parisian neighborhood? If we go deeper still, we find that the baking process specifically occurred every second Saturday. That makes Una's action a bit too planned. Except that there is one Saturday in that pattern where she did not bake. Sure enough, further investigation finds that Una attended biweekly baking classes on Saturdays during her time in Paris last year and practiced at home as per the course. The one Saturday gap: she was out of town! But then, there is also something about the place she was buying her ingredients from, which changed midway!



As you can see, there is no end to patterns that can be found in our behaviors or events around us. Some may be random, but as AI reveals, in an overwhelming majority of situations, patterns do exist and can reliably indicate what will happen in a similar situation in the future. That is especially true when it comes to human behavior. Our limited ability to understand behaviors accurately is more due to a lack of data that would allow us to analyze all factors that affect what we do or desire. Your liking for butterscotch ice cream may be rooted in a childhood ritual you had with your dad, but there is (maybe, thankfully) no recorded data showing that for any AI system to study.

Nonetheless, AI's ability to analyze things deeply is why we find it in most things around us – from our smartphones to weather predictions. It is why Netflix is so good at recommending what you may like to watch today. It is also why Google manages to show us advertisements for something we have only “*secretly*” been thinking about. An example I often cite is how the retailer Target's AI system supposedly learned that a girl was pregnant even before her father knew – all thanks to her shopping behavior which seemed to indicate pregnancy! (5).

### **4.3 Future of marketing, sales, and customer success**

The mainstream usage of AI today in most organizations is to automate the internal process and get deeper insights into customers along the customer journey (but mostly, not to subliminally influence them). Every part of a customer journey now utilizes technologies to automate and support its execution. This implies that as a customer journey expert, you are expected to understand and use modern technologies. A distracted, gratification-seeking customer is a very different beast than the buyers of Ford cars back in the day or even the executives buying Xerox machines. The customer today is like the protagonist in the TV series, *The Bachelor*. To cut out all the noise around him and to win him over, his journey from the first meeting to the first date to engagement and finally, to marriage, must be consistently appealing and rewarding for him. If he meets a different you on the first date, only to experience a different version of you at the time of engagement, the wedding's off. And other bachelors will come to know about his experience too.

The AI technology is advancing rapidly, with techniques being constantly improved upon. There are techniques that can help AI predict both quantitative and qualitative elements, categorize things, find the best (say, quickest or cheapest) way to achieving an objective, and minimize risks of it being wrong. AI is also able to think the way humans do with the use of “*neural networks*” in our brains, and to learn from its mistakes the way we do. And AI can not only read but also see, smell, listen, and talk. And of course, it gets better at each of those tasks with time.

### **4.3.1 Examples of AI-led advances in marketing**

The future of marketing, sales, and customer success is being shaped either directly by AI or by other channels influenced by it. Consider the shift of social media from Silicon Valley’s app model to China’s superapp model. (6) A super app is an app that allows multiple tasks to be carried out from its environment; the most common example being the integration of ecommerce where users can buy things or make payments from within a social media channel. The model works because it is convenient for the user and beneficial in terms of better and more relevant product recommendations. After all, consolidation of all of the user’s actions within the same environment allows the AI to understand her tastes and preferences more accurately.

Besides pre-built AI solutions available in the market, larger companies typically build custom AI models for their specific needs. In the field of Marketing, common examples include the application of Clustering to determine distinct groups of audience or customers, and Association Rules to find patterns in consumer behavior to help predict them better. Discussing these techniques would take us beyond the purview of this book and into the vast technical realm of AI. From a managerial context, they are covered in great detail in the first book in this AI Management series, *Artificial Intelligence for Managers*. In this book, we will stick to pre-built solutions that marketers can buy for specific use cases.

Spare a moment now to think about how far AI can take marketing. Today, consumers expose their interests, behaviors, and opinions more often every day through various media. Now, our conscious self takes longer than our subconscious to register information. And we are talking microseconds here. There are enough of those in the 10 seconds we typically spend looking at a

webpage. Repeated subtle exposure in flashes to a certain idea or image registers it in our brain without us realizing it. Often called **priming**, it is a way to induce a certain action or response. Also known as **subliminal marketing**, marketers have actually been using this technique for decades. It just wasn't always accurate. But that changed once information on our behavior and the ability to analyze it became available, thanks to the internet and social media. More and more of such analysis can be automated and directed to our subconscious behavior, thanks to AI. The scenario becomes very real when you think about the Cambridge Analytica scandal, where the Facebook profiles of tens of millions of American voters were obtained in 2014 to draw psychological profiles that could help influence the US election. (7).

### 4.3.2 Issues with AI adoption

Throughout this book, we will discuss the many AI tools that can perform or support tasks in different facets of growth functions. It is important to remember that by the time you read this, several of these tools may have been acquired or perished. Nonetheless, there would be others with the same technology that would have replaced them. These are the types of tools you can (and sometimes should) use today. With such an arsenal of tools powered by AI, there should be no stopping marketers. So, what's standing in the way? The issue is threefold.

First, our knowledge of AI is limited. Most of it exists among the data scientists and software engineers, but not among the managers who are involved on the customer-facing side. Most AI initiatives today tend to fail because the organization or the team is simply not ready to use the technology, whether due to miscommunications with the tech team, over-expectations of what the tool can do, or a lack of appreciation of what it takes, from the users' point of view, to make an AI solution work.

To cite a simple example of the disconnect between business and technical teams, consider a project we were working on with a logistics client to increase their profitability. Common business logic would tell us that when costs go up, profits go down. However, our data scientists argued that the reverse was true, and profits went up when costs went up! The reason behind this anomaly was that the client had priced high-costing premium products at higher margins. Consequently, according to the historical data, every order

that showed high costs, also showed higher profits. That, in fact, is true for most businesses and flies in the face of common perception and mathematical reality. Data scientists and AI itself speak in terms of what data shows and that can be very different from our expectation of reality based on “*common sense*” and “*logical assumptions*”. The first book in the AI Management series, *Artificial Intelligence for Managers* tackles such issues, and the journey business managers typically face with AI tools.

Second, owing to the legacy systems in which marketing, sales, and customer success came into being, we have continued to treat them as siloed entities with only bridges to connect them. As a result, all data gathered by and for these entities exists separately or in an incoherent fashion. For all its power, AI is reliant on data as its main food and is useless without it. So many organizations wishing to use AI have to start from the basics by first getting their data in order. That usually means improving everything from where data is sourced from to where it is stored. The second book in the AI management series, *The AI Split*, addresses the issue of AI readiness in organizations.

Third, patterns reveal correlations, not causations. So, an AI system may be able to find out that X always happens after Y but does not generally know why that is the case. Though advanced techniques like deep learning can change that, the sheer volume of data that deep learning requires puts it out of reach of most organizations. Correlations can be very helpful and yield surprising insights, but they can also be misleading. Imagine seeing a high correlation between ice creams sold and murders in an area, or between eating organic food and autism! (8)

Organizations have widened their reach into our lives anyway by interconnecting different environments to allow a seamless flow and capture of data for AI. Home automation is a classic example. Syncing our phones with computers would be a more basic one. As the **Internet of Things (IoTs)** (which connects multiple entities) and 5G (which increases the speed of information exchange) proliferate, this enablement will only become stronger.

Without further ado, it is time to begin Una’s brand journey and to look at how modern-day tools and AI techniques help her on the way. Remember that some of the tools may no longer be available by the time you read this book. Technology evolves fast and acquisitions, rebranding or organizational collapses are common. However, rest assured that there would be other tools

with similar use cases and technologies that would have replaced those. The purpose of this book is to make you aware of the diverse technologies, where they fit in a brand journey and how they enable it. So, let us embark on our quest to explore how marketing, sales, and customer success are being shaped by AI.

## **4.4 Conclusion**

Customer-facing functions have evolved with time to keep up with changing customer preferences as well as the tools that were available to organizations to drive customer acquisition. For a long time, marketing and sales remain fused together in a direct act of persuading the target audience. Their departure truly began with the increasing awareness and resistance of the general public to active and intruding sales efforts; particularly, door-to-door or via telephone. Soon enough, creative marketing ruled the B2C domain while process-oriented sales strategies found home in B2B. Meanwhile, service had found its value as far back as the era of Fordism but would not truly be appreciated until much later. The arrival of the internet and other digital technologies made marketing more focused and brought analytics into the front. But it was social media that returned organizations to the use of a common channel for marketing and sales.

The economic growth and the possibility of instant gratification resulted in a very distracted customer base, which forced companies to dig deeper into finding ways to hold their attention with hyper-personalization of communication. Artificial intelligence enabled this with its ability to uncover hidden behavioral or situational patterns quickly and in larger volumes which offered organizations greater understanding of customers, automation, and increased process efficiency at a reduced rate, and happier customers, thanks to a more customized experience. Nonetheless, AI's adoption at the workplace has been slow primarily due to a lack of understanding of how to use it well among the managers – the decision makers, investors, and users of this technology. AI's hunger for data and its inability to reveal causations has also played a role. But as it gets better continuously, its role is only expected to expand. In this light, the threat to current marketing jobs is very real, as we will see in the final chapter. That chapter will also introduce us to a job threat assessment which can help periodically assess the risk a job faces due to AI.

This brings us to the end of the stage-setting [Section 1](#) of the book. Having grasped the marketing ecosystem, how it drives a brand journey, and where it stands in the modern era, it is now time to take a hands-on look at how to execute the function today. For any marketer, it is now crucial to learn AI on a non-technical level and be informed of developments in the field to ensure she or he is well-positioned and able to manage AI-driven marketing versus becoming redundant or replaceable by the technology over the years. In [Section 2: Attracting Customers](#), we will begin establishing Una's brand en route to achieving resonance by marrying traditional techniques with modern technologies.

## Questions

1. The fundamental approach to winning customers took hold in ancient times in the form of \_\_\_\_\_.
2. Most marketing was once geared towards facilitating the sale of a product directly by the manufacturer. Is this statement true or false?
3. Some of the benefits of the recessionary dot com bubble burst were:
  - a. It gave birth to search engines and social media.
  - b. It led to more robust laws to monitor the digital domain.
  - c. It sensitized organizations more to the use of analytics.
  - d. It corrected over-expectation and hype with regards to the internet and made way for more mature software business models.
4. \_\_\_\_\_ gave organizations a common channel for marketing, sales and customer success.
5. \_\_\_\_\_ is a way to induce a certain action/response from a customer.
6. What is the correct order in which an AI model typically performs the following functions?
  - a. It finds patterns or correlations between inputs and outputs historically.
  - b. It learns from its mistakes and improves over time.
  - c. It takes in inputs from data sources.

- d. It acts or provides outputs based on the patterns.
7. Which of the following are reasons why the adoption of AI at the workplace has been limited so far?
- a. Our knowledge of AI and how to use it well is limited.
  - b. AI techniques are not strong enough to be of practical use.
  - c. Organizations are generally not ready in terms of data that AI needs.
  - d. AI can reveal correlations but not causations, leaving us without an answer to the why behind a particular insight.
8. \_\_\_\_\_ and \_\_\_\_\_ are more advanced forms of AI.
9. Which of the following are the primary tasks AI is currently used for:
- a. It is used to add more human-like workers to the team.
  - b. It is used to automate certain tasks in a role for more efficient action.
  - c. It is used to generate deeper and quicker insights for more effective action.
  - d. It is used by organizations to replace humans to perform a task.
10. In order to understand AI, use it well and stay informed on its developments, one has to learn coding. Is this statement true or false?

## Answers

- 1. Missionary sales
- 2. True
- 3. B, C, and D
- 4. Social media
- 5. Priming/subliminal marketing
- 6. C>A>D>B
- 7. A, C, and D
- 8. Machine learning, deep learning
- 9. B and C

10. False.

AI is where MS Office was when it was first launched – a new technology that would soon become status quo at work, and everyone was expected to understand how to use it at a basic level, without having to learn the backend programming.



# SECTION 2

## Attracting Customers

Welcome to section 2! A strong brand identity is the foundation to creating brand resonance and loyalty, as are the initial steps we take in its journey. Skipping them or executing them haphazardly is tantamount to throwing an amateur in the deep end of the pool to swim. The first phase of a brand journey is about deciding the nature of your offering, creating the right brand identity for it, and teaching the brand to stand on its legs, all of which are often covered by the product marketing team. But what are the various elements that go into it? That will be our focus in this section as we take Una's brand from conception to a stage of looking positive enough to be worth its target audience's time.

In this section, we will discuss the following topics:

- Look at how to validate the brand and product you intend to build.
- Learn how to create a brand identity that resonates with its audience.
- Explore how to drive your brand's awareness while starting to build its credibility.
- Pursue audience interaction more effectively and actively with ads.

The chapters included are:

- [Chapter 5: Validating Your Brand and Product](#)
- [Chapter 6: Brand Identity](#)
- [Chapter 7: Brand Awareness – Web Presence](#)
- [Chapter 8: Brand Awareness – Social Media](#)
- [Chapter 9: Brand Awareness – Online Ads](#)

## CHAPTER 5

# Validating Your Brand and Product

Una's journey begins with finalizing her offering. Her inner circle has endorsed her bakes well enough, but which audience type does it represent, and how valued might her bread be for others? Given the competition or consumer tastes, would she be able to offer something that catches people's attention? In this chapter, we will see how we can validate our hypothesis about how our target audience will perceive our brand and product. Doing so will also help us gauge the demand for our offering and how it can be improved further.

### Structure

In this chapter, we will discuss the following topics:

- Why validate?
- Hypothesis mapping
- Hypothesis validation
  - General surveys
  - Personal interviews
  - Focus groups
- Result analysis

### Objectives

This chapter initiates our brand journey with the crucial step of validating the importance of the offering that the brand will represent. By the end of this chapter, you will be able to understand what exactly are your target customers' needs and challenges, assess if your product/service can solve these needs and challenges, learn what the customer will be willing to pay

for it, and study how and what the product/service needs to be like to gain customer loyalty.

## 5.1 Why validate?

Let's start with a story – one of a toothbrush and a mobility scooter; two distinctly different products.

One evening, as we were out on a stormy, snow-laden winter night, we came across a disabled gentleman on a mobility scooter. It's like a three- or four-wheel motorized wheelchair equipped with a basket, that can be driven outdoors by those who have mobility issues, thereby helping the disabled to move around, go shopping or run other errands. As this particular man crossed the road, his little vehicle's ability to move over the uneven sludgy snow looked very impressive indeed. Unfortunately for the rider though, the basket attached to his scooter fell midway, carrying with it the supplies he had bought. Several pedestrians rushed to help collect the items for him and hook the basket back, before the lights changed from red to green for the cars around. But the basket fell again a few meters later. Someone had to eventually carry the basket and walk with the scooter in that weather to safely drop the man nearby.

Back home, later that same evening, as we watched an episode of 'The Crown' on Netflix, we came across the Queen of England brushing her teeth with a rather normal-looking toothbrush. Her trespasser, Fagan, quips, *The richest woman in the world, but look, it's not even electric!* Why should it be? As a personal utility item that is least representative of an individual's status, even an ordinary toothbrush serves its purpose reliably enough, whoever we are.

The organizational liability of the humble toothbrush couldn't have been more different than the scooter's. On the other hand, a mobility scooter's criticality to the disabled makes it a product that must, at all costs, perform reliably. Consequently, while a conventional toothbrush could be just as satisfactory as an advanced electric toothbrush for even the Queen, a mobility scooter with even the most advanced machinations can fail as a product if the tiny unassuming hook holding its basket turns out to be flaky.

Why is this important? From a product design perspective, a company can comfortably make toothbrushes of varying quality for different price points.

But cutting corners for mobility scooters to increase profits can backfire tremendously. This is also where the ethics of marketing comes into the picture as a company looking to produce a cheaper quality scooter that could sell for less, likely shouldn't be in the business. You wouldn't want Boeing or Airbus to make low quality aircrafts, would you?

Product validation falls under the domain of product marketing; a domain that continues to oversee the next stage of brand journey. At this first stage, though, it involves two considerations:

- The demand for the specific product variety, or even the product in general.
- The feasibility of producing, selling, and supporting the product at a profit.

While a careful thought on a company's ability to make quality scooters profitably requires it to look at the costs, that is actually step two. It plays a crucial role in determining whether producing a product is feasible as well as in formulating the "*Tier II strategy*" of a brand journey. Step one, meanwhile, is to determine how much your chosen consumers are willing to pay. That requires validating the demand for a product, which closely impacts the brand identity formulation, as we will see in the next chapter. What we learn next helps with the "*Tier I strategy*" of finalizing target customers and positioning the brand appropriately for them. Let us now go back to Una.

Before creating a brand or building her product/service, Una will need to ensure that there is demand for her goods and that the assumptions she has formed about how her brand, be it its name, logo, mantra, or general feel, will be perceived or resonated with, are actually true. This can be assessed through a validation process. The main goal here will be to:

- Understand what her target customer's needs and challenges are
- Assess if her product/service can solve this need and challenge
- Learn what the customer will be willing to pay for it
- Study what the product/service needs to be like to gain customer loyalty
- Learn what their first impression or perceptions are when they hear Una's brand name or mantra

The **validation process** begins with a focus offering or set of offerings. With that in mind, it consists of the following 3 steps: assumption mapping, assumption validation, and result analysis. The next three topics discuss these in detail.

## **5.2 Assumption mapping**

When you decide to build a product/service or the elements that form your brand's personality, it is based on a few underlying assumptions:

- Who your target customers are
- What their key unfulfilled need(s) is and how they are meeting it currently
- How important and critical the need(s) is
- Why they would want to buy the product
- How much they would be willing to pay for it
- What they would miss if the product was gone
- Who your current competitors are
- What the product/service need to be like to resolve the customer needs
- What will make them switch over to your brand
- What they will perceive when they hear or see your brand or its mantra
- What the general feeling is that they associate with your brand (is it eliteness, no-frills reliability, or something else?)

Mapping these assumptions out is our first step. This is best done as a group practice, as it can help you get everyone's hypothesis and cast a wider net to figure the right way to build your product/brand. In Una's case, this may even include her inner circle and any support staff. For the specific assumption mapping process:

1. Create a set of questions and hand them to each member.
2. Set a timer for 10 minutes and ask everyone to write their answers individually.
3. At the end of this exercise, create a summary of each person's answers.

A few sample questions would be:

- Our user persona is \_\_\_\_\_.
- We are solving \_\_\_\_\_ need/problem of the customer with Una's bakery products and services.
- Customers are willing to pay \_\_\_\_\_ for our products/services.
- If not us, customers generally go to \_\_\_\_\_.
- Partners involved in building/distributing our products/services are \_\_\_\_\_.
- We need resources such as \_\_\_\_\_ to ensure success.
- Customers will continue to use our products or services over that of our competitors because \_\_\_\_\_.
- Our brand should create a feeling of \_\_\_\_\_.
- Our brand mantra should resonate as \_\_\_\_\_.
- Our brand name or logo will be memorable because \_\_\_\_\_.

Once you have your assumptions mapped out, it's time for *Step 2: assumption validation*.

### **5.3 Assumption validation**

Assumption validation is your reality-check stage. With this step, you are trying to figure out if the assumptions you mapped out in step 1 are correct and/or if you need to revisit your product and brand development plan. If you need to revisit your concept, this process will provide you additional clarity on what exactly you can do to build a successful business.

To begin, create a customer survey. The goal here is to design questions that help validate your assumptions and help gain insight into the varying behaviors of potential customer targets. The questions mentioned above in the assumption mapping section can all go in a survey. The objective is to get prospects to reveal their true needs and the value they associate with it. For instance, a person may have five to ten different unfulfilled requirements, ranging from the type of bread he wants to the time when he wants it or the size, he wants them in, etc. However, each of these will vary in how important and how urgent that requirement really is to him.

This stage can be executed in 3 steps:

### 5.3.1 General survey

Since this is Una's first round of information gathering, she may also want to try and get an overall sense from a large audience as to what their current behaviors are like when it comes to interacting with a product or a brand like hers. But remember the questions need to be more real time; so Una would need to avoid hypothetical questions like: *Would you be interested in a bakery that serves hot bread every morning to noon?* Instead, she should go with questions like: *In the past month, how often have you shopped at bakeries that serve fresh bakes between morning and noon?* As a thumb rule, leading questions (that indicate the surveyor's preference or objective or bias the respondent) should be avoided. And any question requiring ratings should avoid a rating that is exactly midway between the two extremes. And remember, always end your survey with the question "*Would you be open to us contacting you to ask a few more questions and get your expert opinion? If yes, please share your email address.*" With this question Una will manage to create leads for step 2!

Ideally, when conducting an online survey, we would recommend creating dynamic surveys (using skip logic to navigate question lead ups) so that you can get the most out of your consumers based on their behaviors and choices. For this round to be valuable, Una would need to get at least 500 responses. Hence, casting a wide net to get responses is crucial. She can circulate her survey on her personal social media channels, post it on relevant forums, share it via her own network, including but not limited to family and friends.

*The problem with conducting surveys of any kind historically has been a lack of efficiency and accuracy.* Social media has made things somewhat easier by allowing both manual and automated tracking of user behavior and preferences. With time, social channels have also advanced to allow users to gather public opinion through its polls, ask a question, rate it, etc. Una can use these methods too to get answers for some of her most basic questions. For example, Una can:

- Run a poll targeting a specific geography, by asking: "*Does XYZ region need a new bakery that serves artisan baked goods?*" and ask people

to choose between a Yes or No. This would help her learn if the geographic targeting for opening her store is a good one.

- She could ask a question like: “*When visiting a bakery, what products do you mostly buy?*” Through this, she could learn what baked goods she can expect a higher demand for.
- She could also gather ratings by asking social media users, that live in her targeted geography, to rate their favorite bakeries. This would help her learn who her strongest competitors are!

Modern-day platforms take things a step further by enabling the use of AI in surveys for advanced insights. Consider Lexalytics ([1](#)), a text and survey analytics tool that uses Natural Language Processing (NLP), sentiment analysis, categorization, intention detection, and other such methods which can help Una uncover context-rich patterns and insights hidden within a plethora of social comments, surveys, reviews, and any other text documents to see who’s talking, what they’re talking about, how they feel, and why.

Tools like Lexalytics can allow automation of a survey by, say, simply tracking posts on social media. Users can adjust the privacy levels to comply with regulations around the use of personal data. The end result consists of the words commonly being associated with a topic, the sentiments being expressed, and even the polarity between differing opinions. For instance, in [Figure 5.1](#), we see positive and overall words associated with “*wine*” in a given set of responses as well as the polarity of opinions and other such details.



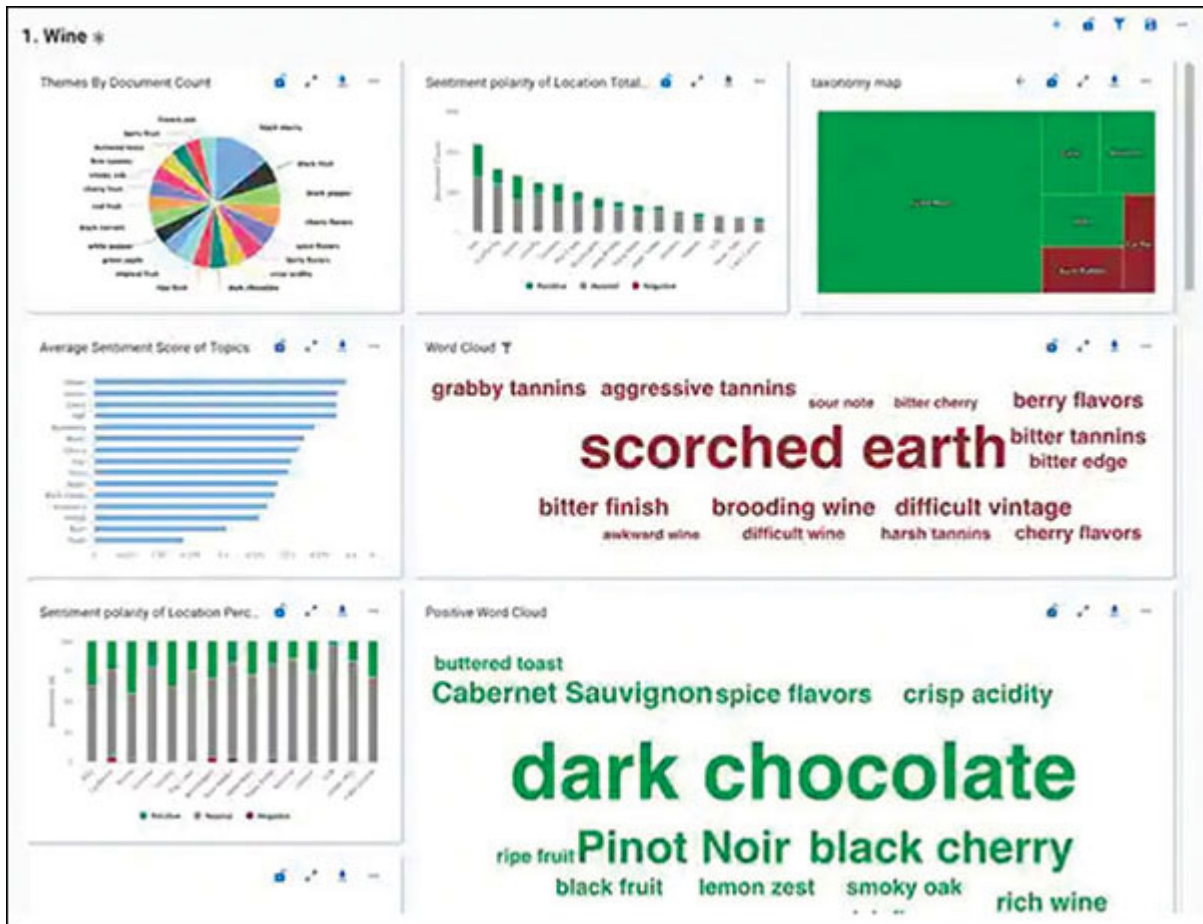


Figure 5.1: A typical Lexalytics visualization (2).

Figure 5.2, meanwhile, shows how people’s sentiment towards “way finding” has changed between positive and negative over time:

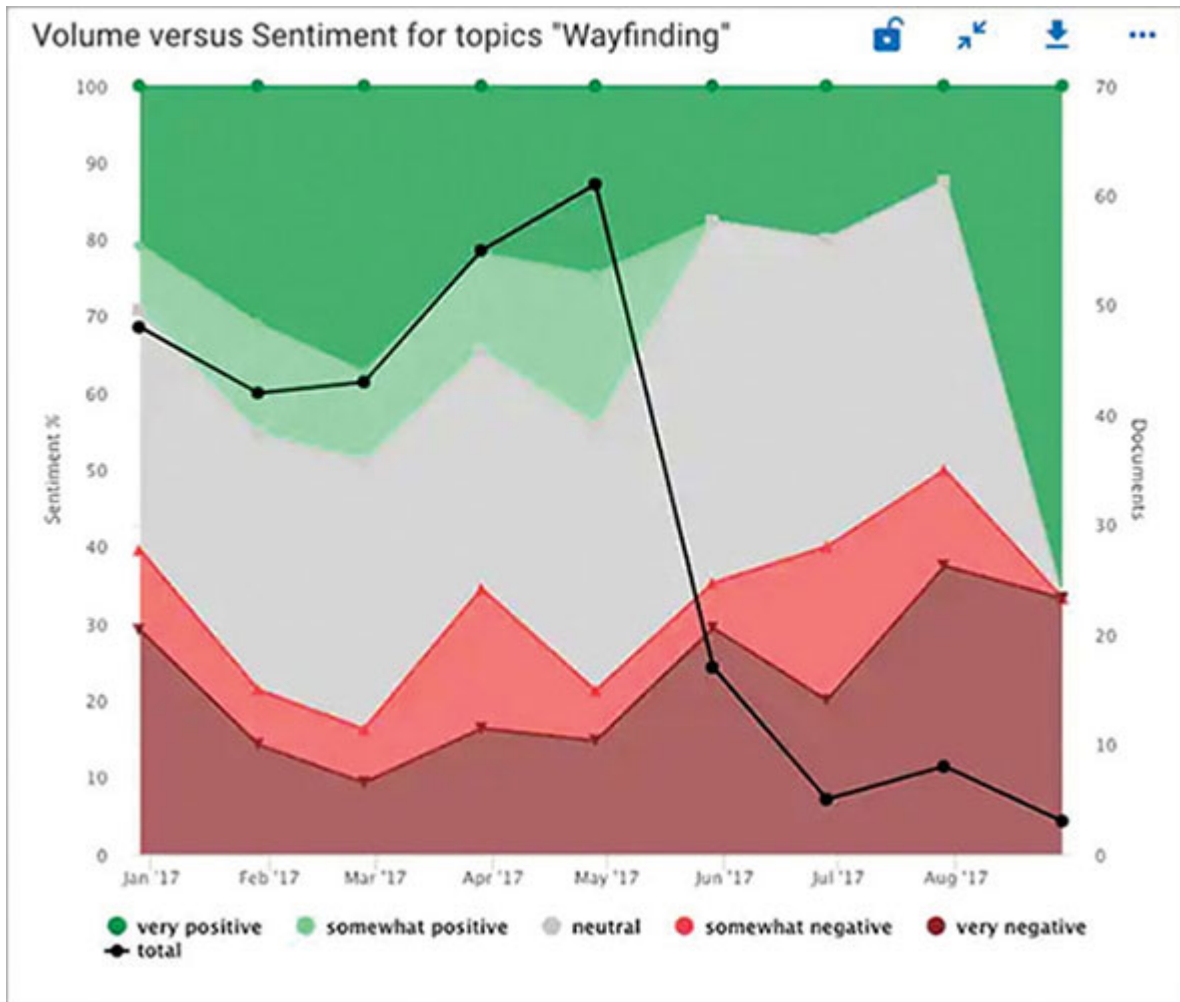


Figure 5.2: Sentiment tracking by Lexalytics (3).

### 5.3.2 Interviews

Before moving to step 2, Una has to make sure she has analyzed the responses from step 1. She would try to gauge what current consumer behaviors are like based on the responses she has received, and then assess what her next questions should be so that she can get more clarity on the challenges and needs of different potential target markets. Through this process, she wants to understand if her brand or product will indeed be the right solution, and for whom.

As mentioned earlier, high participant volumes are crucial for robust data. They can be leveraged much better with some level of automation. Remesh.ai (4) is an example of a tool that uses a range of AI techniques that can empower Una to have live conversation with a large variation of audiences.

It then analyzes the opinions and interactions of up to 1000 participants, helping understand the responses that best represent the group. This can help her speed up her interview process substantially if her audience pool is a large one.

Imagine a session with multiple participants where you post a question such as “What’s your favorite snack food?” As shown in [Figure 5.3](#), as the responses come in on the screen, Remesh.ai automatically analyzes it to pick out the agreement levels or most commonly used words. It can then allow you to dig deeper with follow up questions selectively based on the responses. This activity significantly reduces the time it would take to soak in responses from such high number of participants:

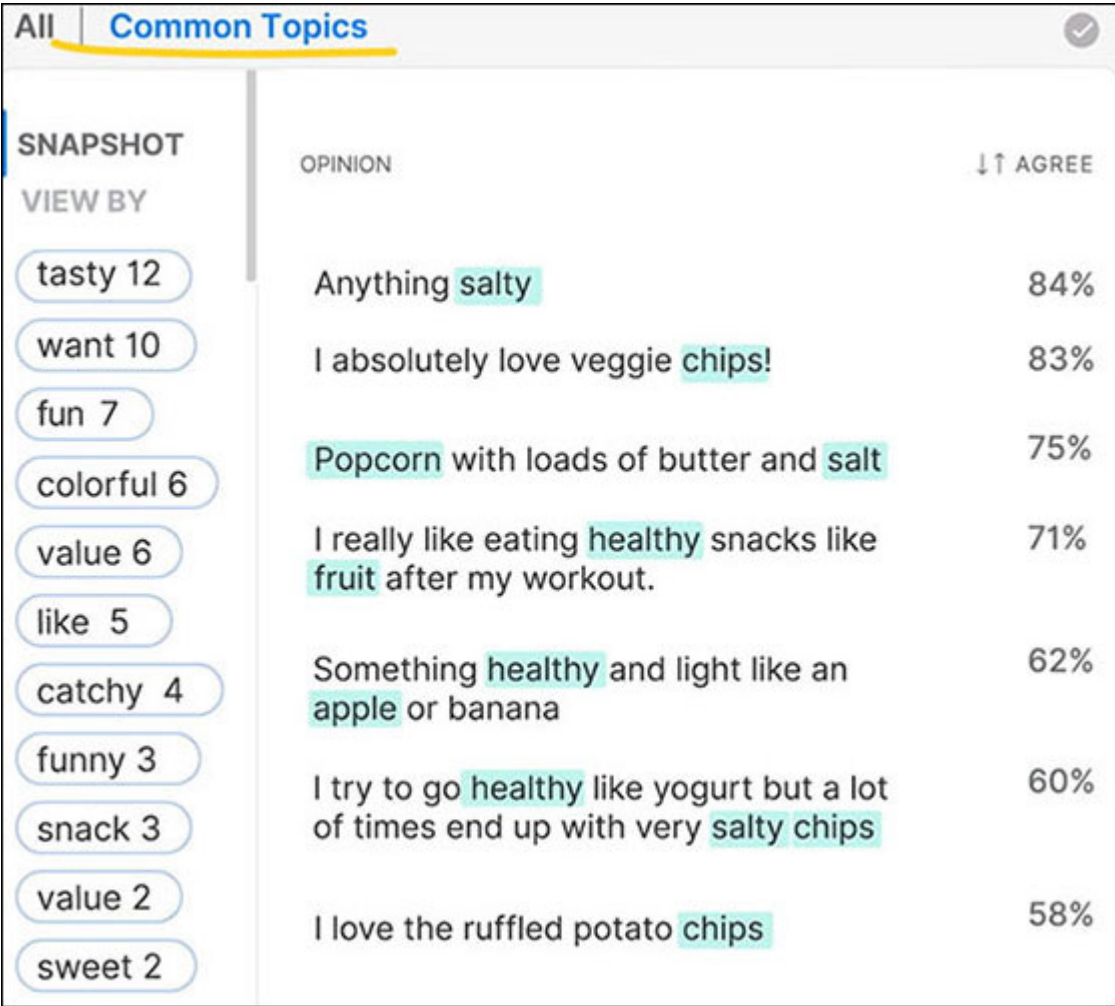
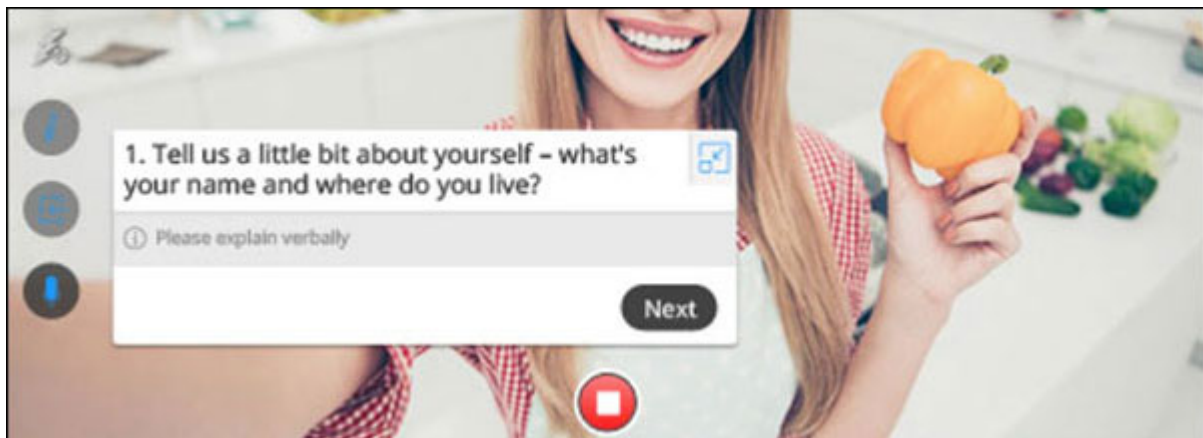


Figure 5.3: Summarization of responses to a question on Remesh.ai (5)

Una should set up interviews to take place in neutral territories so that neither she nor the interviewee will be biased or influenced by the surrounding, unless the observation in question is related to a particular environment (for example, how a customer goes about selecting the bread to buy in a shop). Another thing to keep in mind when it comes to interviews is that they are generally best done in person so that Una can monitor the interviewee's body language too. However, that can take away the possibility of conducting interviews in larger volumes. This is where we must rely on video interviews, ideally using platforms that can read visual cues.

Software like Quallsights can help support Una through both her validation interviews and focus groups. This visual insights platform not only interacts with your audience remotely while recording their feedback and witnessing their actions without influencing behavior, but can also help recruit target customers for your interviews and focus groups from all over the world 70% faster. (6) In [Figure 5.4](#), for instance, you can see the girl and her body language as she talks about herself:



*Figure 5.4: Quallsights interface (7)*

So far, Una had relied heavily on those in and around her inner circle. AI tools help her expand her reach for richer insights. Visual insights such as the one above also help solve the issue of data quality by taking into account disinterested or fraudulent behavior in answering questions. Incomplete, inaccurate, or out-of-context data are one of the biggest banes for marketers, and tools like Quallsights help address these.

### **5.3.3 Focus groups**

Finally, visual interviews aside, focus groups are the best place to test reactions by sharing prototypes or samples. Traditionally, Una could invite a group of five diverse individuals and share samples of her bakes and images of her logo, brand name/mantra and study how people would react to it. Make sure you tell them to be as critical as possible! Based on their feedback Una will know where she needs to improve or what she can do to appeal to her audience.

At the beginning of each step, always remember the goals we started the validation process with. With that in mind, focus groups can involve a range of psychometric analysis such as **Zmet (Zaltman metaphor elicitation technique)** or **TAT (Thematic Apperception Test)**. We invite you to explore other such techniques online that can inform which questions to ask and how to ask them based on the nature of your specific product.

Generally, technologies that come in handy for interviews can also help with focus groups. The only roadblock with the latter is that focus groups run far deeper in assessment and are more intimate. Consider CRISbot [\(8\)](#), a conversational research insight system that can help Una automate her process. Once she programs her questions into the site, the bot keeps the conversation going! With the help of machine learning and sentiment API, CRIS can identify themes for reporting, gauge sentiments in conversations and respond accordingly, as seen in [Figure 5.5](#):



*Figure 5.5: Crisbot in action (9).*

The advantage of using such bots is not only in the automation but the customization that can be achieved. Crisbot is adept at keeping the participant engaged based on the nature of responses that come in. There is a lot that Una can learn from the way they react to the questions she asks. Remember, the goal here is to get clarity on people's current needs and challenges; so asking questions that help get more information on their responses to the survey are a good idea. For example, if someone has responded to Una's question "*How often have you shopped at bakeries that serve fresh bakes between morning to noon in the past month?*" with a "Never" or "less than 5 times", the next step would be to ask them "*why?*" Una would be trying to find out if this was because fresh bakes don't necessarily appeal to them or if they rely on large franchise stores instead due to poor access to local bakeries.

Time now to match Una's hypothesis to her actual findings!

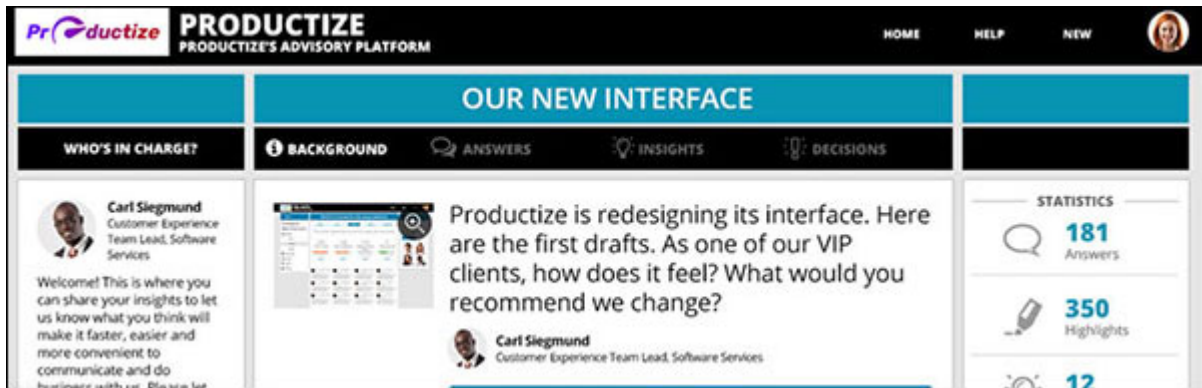
## 5.4 Result analysis

Una's objective at this stage is to assess what her to-be fans are likely to be like, what their circumstances are, and what they truly value. Most importantly, what would it be about Una's offering that they cannot do without or may suffer negatively in the absence of. As mentioned earlier, if Una stopped selling her breads tomorrow, her target customers may miss a trusted and good quality bread but will likely be able to live with it. In such a case, Una will have to find a deeper, more critical need to address with her offerings.

Once Una has her data and findings, she can bring back the original assumptions and compare the two. Our experience is that "whiteboarding" this process may make it easier, particularly if Una is a visual person. She would now join each assumption to its respective findings, and reframe each point factually based on what the results are in order to validate how far her initial product plan matched what her target market actually wants or feels.

Una can map the prospects' needs on a 2X2 map based on where they fall across two dimensions: **Impact** and **Urgency**. Naturally, the items that are high impact and highly urgent will also be the most valuable in the prospects' eyes. This should give Una a clear idea of her next step: whether to proceed with the planned offering or go back to the drawing board! More importantly, as we will see in the next chapter, this step directly guides Una in pursuing Tier I and II strategies to take her brand to the market.

The product validation and brand identity formulation steps are closely related, as are the technologies that assist them. Every tool that assists in gathering and analyzing data today comes with a visual layer to make sense of all that information, as we have already seen in the examples discussed earlier. There are also those like Insights ([10](#)) that can help Una and her team get valuable advice by asking the right question to the right people through her choice of channel and analyses the resulting responses to give quality insights. As shown in [Figure 5.6](#) for a sample company called Productize, this tool more directly shares targeted questions around product ideas that have been developed as a result of the prior surveys, to the target audience in order to validate one's understanding of what would make a product a hit.



*Figure 5.6: Insights in action (11)*

To be able to validate ideas with the target before investing time and money into it is one of the most common best practices companies miss out on. However, there is a critical element missing at this stage for Una, and that is an understanding of who exactly is her target customer among all bread-eaters out there. Leveraging the tools mentioned above can also help her better define which aspects of her offering resonates with whom, in order to help her Tier I strategy objective of coming up with a positioning that will resonate with her chosen target customers and yield sustained profit for the business. This will be our focus in the next chapter.

## **5.5 Conclusion**

Product validation is needed from two perspectives: to gauge demand for a given product type and the consumer group that it appeals to; and to gauge the operational and costing feasibility to reliably and profitably cater to that demand.

This process rests on listening to the potential customers and correcting assumptions. The first step, therefore, is to map out your assumptions about your target market, its behavior, interaction with your product/brand, perception of your brand and its identity, etc. We then gather real-time information through a combination of various methods like surveys, interviews, and focus groups (which can include psychometric analysis). The objective is to use this information to verify if your assumptions are correct. If not, the plethora of information gathered through this process will equip you to tweak your understanding of the market and create a plan that will ensure your business survival and success.



Validation should be front and center of mind when designing your product and brand plan. As we will see in the next chapter, it plays a crucial role in helping define the brand identity, which is the foundation of all market strategy and governs a company's ability to thrive profitably.

## Questions

1. All products must be reliable. Is this statement true or false?
2. Besides assessing the demand and operational feasibility, which of the following objectives can product validation help meet:
  - a. It helps with competitor mapping.
  - b. It helps persuade customers on the value of a product.
  - c. It helps understand the different customer segments in the market.
  - d. It helps align everyone in a team with each other's assumptions and reality of the market.
3. \_\_\_\_\_ helps put forth all underlying assumptions in the team about the product and its market.
4. \_\_\_\_\_ questions should be avoided as they indicate the surveyor's preference or objective or bias the respondent.
5. Which of these questions may be okay in a survey?
  - a. A question that asks respondents to rate something on a scale of 0 to 10.
  - b. A question that asks respondents to rate something on a scale of 1 to 10.
  - c. A question on social media targeting a specific demographic or technographic feature.
  - d. An open-ended question.
6. Interviews are best done in person so that you can monitor the interviewee's body language too. Is this statement true or false?
7. \_\_\_\_\_ are a great way to test reactions by sharing prototypes or samples.

8. Psychometric tests are always needed in focus groups. Is this statement true or false?
9. Assumption validation is the reality check stage. Is this statement true or false?
10. What is the correct order of the 3 steps involved in a validation process?
  - a. Results analysis
  - b. Assumption validation
  - c. Assumption mapping

## Answers

1. True.

All products should perform as expected. It is the expectation that tends to be higher or lower for different products, thereby requiring varying degrees of sophistication in building a reliable product.

2. A, C, and D

3. Assumption mapping

4. Leading

5. B, C, and D

6. True

7. Focus groups

8. False

While true in most cases and certainly having an appeal at all times, the use of psychometric tests depends on the objective of a focus group. They may be useful in helping understand the consumer psyche but should only be used if that level of depth is required in the information being sought.

9. True

10. C>B>A

# CHAPTER 6

## Brand Identity

Una has decided to open a bakery. At this stage, she may name it after her grandmother, after the location it is based in, after her most popular product, after something that sounds nice, or simply after her name. She has to also decide the decor of the place, the colors to use, the mantra she wants to go by, and other such messaging trinkets. Suddenly, given the financial and operational burden she has to manage in opening her store, the brand component may start to seem rather overwhelming. It is imperative that Una slows down and gets the basics in place: a validated product, which she now has and a suitable brand identity to reflect that.

### Structure

In this chapter, we will discuss the following topics:

- The importance of brand identity
- The identity formulation process
  - Tier I strategy
    - Segmentation
    - Targeting
    - Differentiation
    - Positioning
  - Tier II strategy
    - Product
    - Pricing
    - Place and promotion
    - People and process
- Defining brand elements

- Brand mantra

## Objective

This chapter helps establish how a brand will represent a market-validated offering. By the end of this chapter, you will be able to understand why finalizing the brand identity in the beginning is important. You will also be able to establish a clear promise on what the brand delivers, decide how to bring your brand to the market, and define elements that go into creating a brand identity.

### 6.1 The importance of brand identity

Brand identity is the domain of *brand marketers*, but they have to work closely with the product marketers, given its dependence on the findings from the previous stage. Product validation is crucial but must be closely followed by a careful brand identity formulation because the final offering is determined by a combination of these two. A famous example that comes to mind is one of Aqualisa, a major UK manufacturer of showers. When the company launched its carefully thought-out product, Quartz, it received rave reviews from consumers and plumbers alike. It was the perfect product, reliable in its longevity, and advanced in a design that resulted in water remaining at the perfect temperature for showers. Despite it solving a persistent problem with showers and thus meeting its end users' needs, the sales failed to climb. **(1)**

The common notion is that a truly good product always succeeds. However, “good” here is often misinterpreted. For a product to be good, it has to not only function perfectly but also satisfy the collateral requirements involved in it being produced by an organization and bought and used by the target customer. In the case of Aqualisa Quartz, one of the things the company missed was that its target audience were the plumbers, who directly influenced 73% of the shower selection decisions by households at the time. **(2)** For the plumbers, regular business was key to their annual income. A shower that would not require repeat business any time soon, or one that may be complex to install or realize sufficient margins on, discouraged plumbers from deciding or recommending the product to their customers.

Giving careful thought to the brand identity is important because it builds on the results of product validation and expands the scope to determine which target segment to sell to and how. Without it, a product may have been validated, but the feasibility of making profit on it is still undetermined.

A brand identity can be defined by many brand elements. The name, mantra, and logo are just a few of the more visual ones. There are also the implied elements, such as the use of pastel colors in store, or a consistent Swiss style across the website, or even the sense of joy that Disney adheres to. Most companies hesitate from thinking about the brand identity thoroughly owing to its perceived lower status in the list of priorities facing new companies. It may not matter initially because often, the owners understand the product they are trying to sell or the market they are operating in through experience. There is a rich pool of subconscious knowledge aiding them. That, however, is also where the problem lies.

Our subconscious can make us biased without us realizing. That bias can creep in due to a host of innate or external factors we have been subjected to over the years. Una may dislike the use of bold colors because she is an introvert by nature; she may use a certain font style in the name because she has often used it in her writings and has come to subtly associate that style as her unique touch. As we discussed in [\*Section 1: Understanding the Brand Journey\*](#), the subconscious is where a large bank of subliminal marketing rests, deemed illegal in many areas due to the power it can hold over us without us consciously realizing. We continue to see and be influenced by its presence every day, nonetheless. As a great example of subliminal marketing on display, I invite you to watch this experiment on YouTube:

<https://www.youtube.com/watch?v=43Mw-f6vIbo>

Not giving the brand identity formulation process due consideration can also result in significant missed opportunities. The entire step of product validation is designed to inform the brand identity, or what people will know, and perceive us as. As we will see in this chapter, this process helps us understand which customers to target and why. It then allows us to decide how to take our product to the market, or in other words, how exactly to meet the demand of the target market profitably. Besides correcting any false assumptions or misperceptions in time, all this allows our organization to internalize why our ensuing market strategy is what it is. It also allows the team to “*get in the act*” of keeping the brand identity alive in everything the

organization does, and more importantly, remember why that is important – all of which is fundamental, and can be lost, as time goes by and a brand evolves in its journey.

## 6.2 Brand identity formulation

Brand identity has historically been interpreted as the look-and-feel of a brand, namely, the **brand elements**. In an age of virtual offerings, perpetual, unsupervised brand engagement with consumers, and remote consumer-to-consumer feedback, a brand's identity is determined as much by its elements as its presence. In fact, the choice of elements depends on where and at what price the product is being sold, which in turn depends on who it is being sold to, which is defined by the value that the offering can bring to the table. As a result, brand identity formulation is a three-step process:

1. Tier-I strategy is where we establish a clear **promise** on what the brand delivers at its core, and a **position** which elucidates how the brand is different from others in its category.
2. Tier-II strategy is where the output from Tier-I then reflects what Una's **product** is and how she sells it.
3. The output from Tier-I and Tier-II strategies then enable us to finalize **elements** to suit them.

We will tweak these to our current times. As you may have realized, both these strategies are closely informed by the Product Validation that Una has just gone through. Bear in mind that her brand identity need not be perfect from the start, but it has to be true. It requires patience - in pondering over something as small as whether to include a space between “*face*” and “*book*”, and a willingness to revisit that decision as more information becomes available. That was precisely what eventually saw that space being removed from that social media channel to give us the name we all know today.

### 6.2.1 Tier-I strategy

In order to decide on the value to promise to customers, Una has to decide who her customers will be. Traditionally, this process involves segmentation, targeting, differentiation, and positioning, in that sequence.

Each step is informed by its predecessor. For the first two – segmentation and targeting, Una has to pick up her notes from the validation step.

### 6.2.1.1 Segmentation

Whether we are looking at our audience online or offline, the world is a vast cauldron of different personalities with different tastes. A single person may belong to different groups when it comes to different products. For example, you and I may have different tastes in ice cream flavors, but we may both like the same genre of movies. A strong brand identity appeals strongly to the group that it is most likely to eventually resonate with. To deduce that group, Una first needs to segment her audience profile into distinct groups. This grouping was traditionally done by obvious identifiers such as age, demographic, location, gender, etc. It can also be informed by competition, which is generally a great way to start thinking about the identity, since established and proven references of other brands are already in place. Una may already have been aware of such segmentation when she had started the product validation, but over the course of the process, she is likely to have come across deeper segments. Marketing has now evolved to enable grouping by more subtle factors, such as behavior, personality, preferences, and associations. These segmentations are where AI tools can work wonders in catching subtle differences that may not otherwise be visible.

Segments can be determined based on Una's understanding of what her prospective customers are characterized by, what they most value, and what their highest priority unfulfilled needs are. All this information can be retrieved from the product validation step. As discussed in the previous section, certain AI techniques like Clustering could help identify segments, but Una neither has the sample audience size nor the budget to afford building custom models, making it more feasible to take traditional approaches, but with modern solutions. The mechanism of different AI techniques is beyond the scope of this book. However, if you are interested in learning which AI techniques to use to create your own custom AI solutions, and when and how to use them, we invite you to read *Artificial Intelligence for Managers*, the first book in this series.

Una may not be able to segment her audience perfectly from the outset; she doesn't need to. This stage of forming a brand identity is simply to give Una a starting point that she can then tweak and revise as her business becomes

more mature. Suppose Una decides that her bakery will appeal most strongly to those who like the finer details of a well baked dish - the crunch, the browning, the aroma; all very delicate and elegant because she is that good. But such a group can consist of both the fine diners and the cooking aficionados. Una may associate the fine diners with those visiting fine dine restaurants, the wealthier group. Yet, that may be a mistake. This particular segment will compel Una to invest heavily in the decor of her shop, and also price her goods high to appeal to its upscale identity. But what if Una finds that her target group does not visit the area her store is located in. Moreover, as a relatively unknown newcomer, fine dine restaurants may not adopt her as a supplier either. Meanwhile, those who do frequent the area may get turned away by the high prices. Having an identity that appeals to a certain group does not imply putting all your eggs in that basket without proper data to back that decision.

### **6.2.1.2 Targeting**

In our example, Una's misstep only occurred because a good understanding of her product led to a misinformed assumption of who it could cater to. In more precise terms, her segmentation was good, but targeting wasn't. Una's primary choice of segmenting her audience was based on the levels of appreciation people have for baked products. No issues there. If Una is really good and detailed in her baking, her breads will certainly be most appreciated by those who can spot a well-baked bread or would like to be able to. Who that crowd may be would be relatively unknown at first; ranging from proven experts to the average eater who likes to see and learn about good baking?

Inputs from her product validation can help Una determine which challenges or unfulfilled needs seem to most strongly resonate with a given audience segment, and which segment's needs she can best address. The great thing about product validation is that it surfaces not only any unforeseen segments but more importantly, which segment seems to be more drawn to Una's intended products. There may be both commonalities and major differences in what each group considered important (in terms of value) and urgent (in terms of criticality). Una may invariably have to decide to focus on the ones that are most likely to reach the resonance stage, while delivering enough



margins to keep her business thriving. It's a balancing act helped by the next step.

By analyzing Una's audience's feedback and validating her product ideas, tools like Qualtrics Product XM (3) can not only test various aspects of Una's product concept but also spot gaps and find untapped customer segments. We will look at this in more detail in the upcoming chapters. It plays a significant role in helping her figure out which customers are most valuable and what she needs to do to win them over. That includes calculating the total addressable market and the competitive landscape, which would determine the profitability of customer segments Una can sell to. It can help her determine whether a target group, in addition to having a great product fit, is also big enough to ensure a constant stream of revenue.

### **6.2.1.3 Differentiation**

Differentiation is how your product comes to be seen as different from the competitors by your targeted segment. These competitors need not necessarily be in the same category but are defined in terms of how they are viewed or consumed by your target segment. In the case of Una, there may be other bakeries and bakers who are experts. Just because Una has chosen a target does not mean the target has chosen her. The group that sees her product as most differentiated and relevant is the one she is most likely to target.

Crayon is a real-time competitive insights AI platform that can help Una learn more about the external world. (4) For instance, [Figure 6.1](#) shows all the many data sources from which Crayon can extract such information. As shown in [Figure 6.2](#) for a specific company, such tools help track and analyze what the competitors (or customers or partners) are doing or the changes they are going through, thus helping her team design tactical strategies to create a winning product.

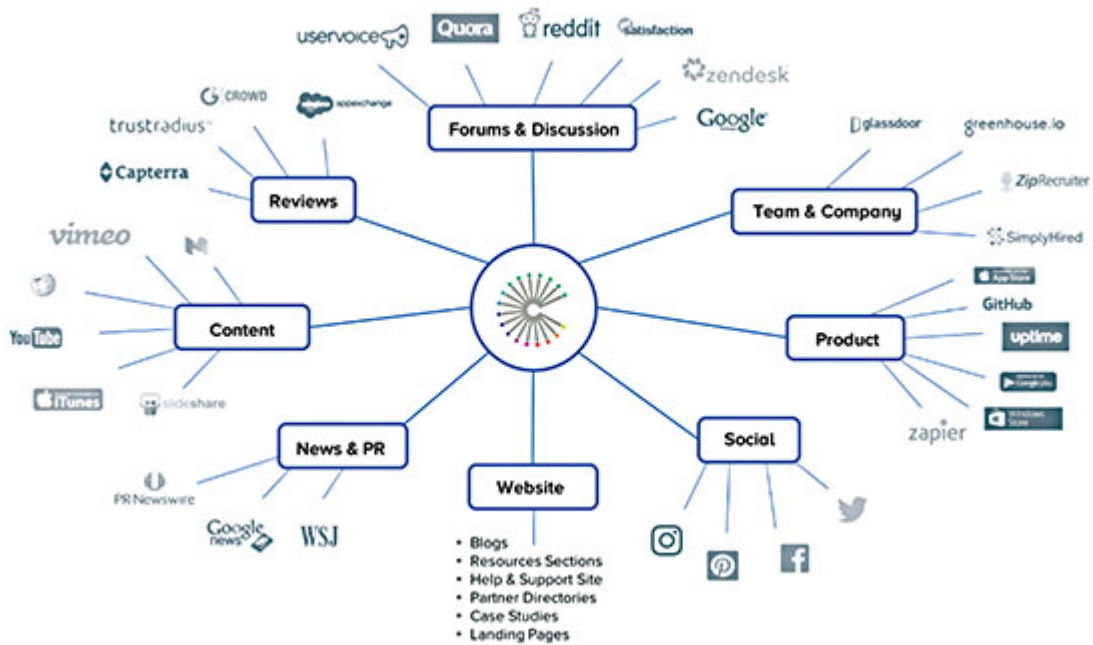


Figure 6.1: Sources utilized by Crayon (5)

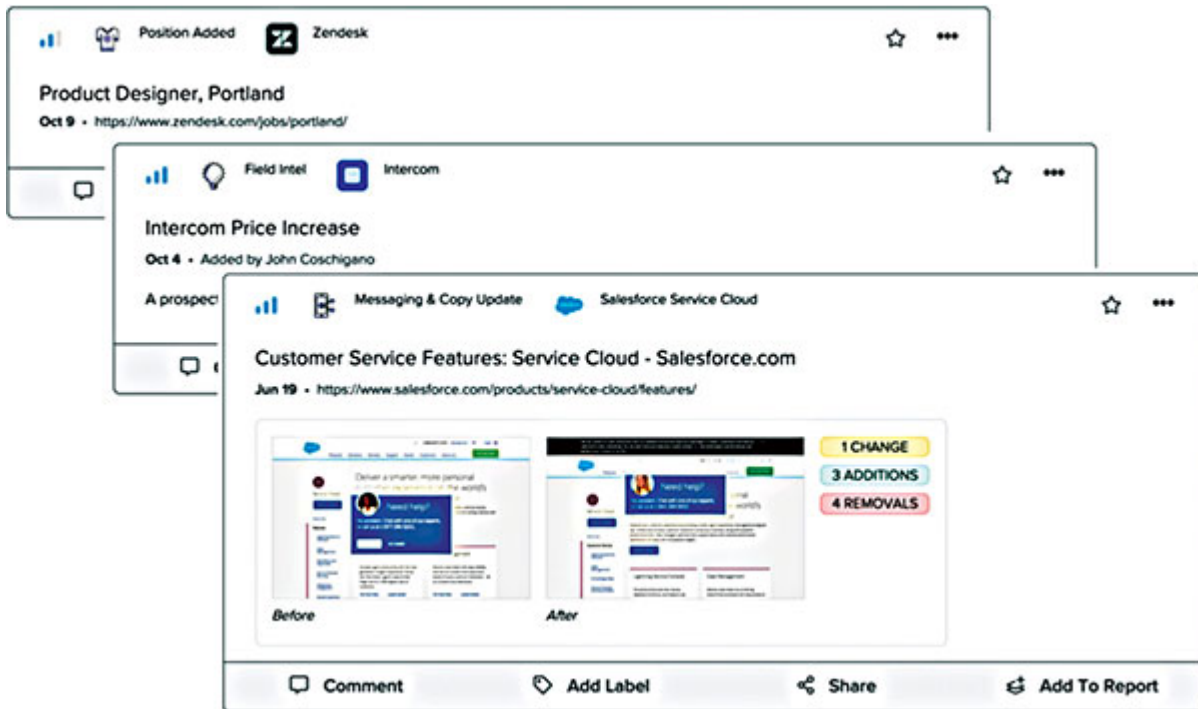


Figure 6.2: Competitive intelligence view on Crayon (6)

Is Una's differentiation in the fact that she is closer and more easily accessible to those staying in and around her area – where no other such

baker exists? Should her differentiation instead be in terms of being lower-priced - a most common choice for new businesses? Or should she get more creative in her differentiation, say, by baking breads with her customers' names or the region of inspiration imprinted on it? This is your chance at creativity - something that will be tantamount to you wearing a golden robe in a crowd of all blacks in a room.

External signals like the ones above can be tracked and picked up by the AI even for specific chosen user profiles, and there is a vast array of tools that now offer this capability. But to crystallize the differentiators from the noise, Una has to look at all customer challenges that Una can address and create an “*impact flow*”. The objective is to distil which features bring what value to differentiate themselves in the eyes of the customer. It goes like this:

**Step 1: Bucket:** Her first job is to bucket these challenges into types or concepts.

For example, if Una was looking to supply breads to restaurants, one bucket of challenges could be “*supply flexibility*” which restaurant managers may appreciate.

**Step 2: Challenge:** Under each bucket, she can then write down each of the priority challenges (based on a combination of importance and urgency).

For example, inability to get breads supplied in the evening may lead to a restaurant's customers getting stale breads during dinner. While this is a valid challenge, if there are ones that Una cannot address, they can be sidelined at this point. For example, a restaurant may want Una to supply breads to one of its locations in a different country. At the current stage of business, Una simply cannot afford that.

**Step 3: Feature:** For each of the remaining challenges in each bucket, she can now write down the features in her offering that can address them. This step will also reveal any gaps and opportunities to enhance what she can offer the market.

For example, Una can ensure frequent and timely deliveries of fresh bread to the restaurant.

**Step 4: Outcome:** Each feature that can successfully address the respective customer challenge will lead to a certain outcome for the customer, which she can jot down.

For example, timely deliveries of breads to restaurants can help them serve fresh breads at any time of the day.

**Step 5: Impact:** As a result of the outcomes, there would be one or few consistent impacts that the restaurant will experience. This can help Una not only crystallize what her differentiation points are but also get closer to her positioning.

For example, high quality breads delivered fresh in a timely and frequent manner for the restaurant to serve its customers can help restaurants looking to establish a reputation for consistently good quality food.

#### **6.2.1.4 Positioning**

Someone wearing a golden robe in a crowd of all blacks may catch my attention, but what will make me go say hello to her? Positioning summarizes the objective and output of the Tier I strategy. It is generally the product of a brand's category and its differentiation. It reflects what you stand for and answers the question: Why should your target choose you over the others like you? Yes, Una can print my name on her bread, but is that reason enough for me to spend 50% extra for it? Positioning is a brand identity's most important component because that is how it will announce its value loud and clear to those in its targeted group once it has caught their attention.

Positioning appeals to the target audience's real need - the better it does so, the more successful the brand identity will be. Just like identifying the precise target, this unmet need is tricky and often unknown at first – unless the product owner has experienced it herself. It can be an innate desire, which takes us into more psychological and even Freudian territory. Once again, the validation process and its subsequent analysis help. Given how esoteric consumer desires can be, Una should keep on the lookout for more cues that may inform the ideal target segment and positioning as she learns more about her customers over time.

Having arrived at the differentiators in her offering, Una can now step back to look at what binds them together. In a way, it is the overall result of impacts listed in the previous stage. For example, if her offering implies that restaurants can consistently offer good, quality breads; add innovative bread-based concoctions to the menu; and ensure the margins are healthy enough (if Una were to offer budget-friendly pricing options) to spend more on enriched

customer experiences; then Una is effectively helping restaurants offer a unique or premium dining experience. This final output reflects Una's ideal positioning, as it has been informed by validated unfulfilled needs of a clear target segment that Una can reliably fulfill.

Key point to note here is that the third differentiator was reliant on Una's pricing strategy. That is why and how Tier I strategies lead us to the next set of deliberations. Once Una knows her intended positioning, she now has to think about how she can enable and deliver on that.

At this point, we must also discuss the **positioning trap**. Let us use a more commonplace example. For an employee, validated positioning allows her to command a higher salary than her peers. The default route to building this validation is by acquiring certifications and years of experience. Many then start to blog, get their articles published, and appear in panels or speaker sessions to add additional and differentiated validity. People also start to build personal rapports with future recruiters to position themselves for a very specific audience. But as we can see, the more specific we get, the better our positioning can be but the more dependent we become on that limited audience alone. The balance between a clear positioning while maintaining a large enough audience base - either in terms of the number of customers or revenue per customer - is key to determining the right target.

For simplicity, let us focus on Una's B2C business and say that her initial positioning is that her personalized bakes are great ideas for a gift or celebration. She does not know that another, different but delicious positioning realization awaits her later in her brand journey! But let's keep that a secret from her for now.

## [6.2.2 Tier-II strategy](#)

With an eye on deciding the brand identity, it is time for Una to move on to the Tier-II strategy, aimed at deciding how she will bring her brand to the market. This is the marketing mix - consisting traditionally of product, price, place, and promotion, all of which are outwards looking. It has been bolstered with more inward-looking components of people and process, giving the mix a more holistic view, especially for businesses. You may come across more Ps being brought in, but we will stick with these six.

As mentioned above, Tier-II strategy is like a bridge between Tier-I and the final brand identity. The former helped Una understand what value she can realistically bring to the market, for whom, and which values she cannot. Her next task is to decide how to meet that customer's expectations. That implies deciding where this target segment resides, what additional or different features her product needs, how it should be packaged and priced, where it should be sold, and how it needs to be communicated.

That final point will directly position Una to decide how her brand should look and feel like, thereby allowing us to decide on the brand elements.

### **6.2.2.1 Product**

Product refers to a decision of what Una is offering the market. The validation stage helped her decide which products may have appeal and demand in the market, and to whom. The Tier I strategies helped her decide which of those demands to cater to. As a result, she can now finalize her portfolio and plan how she will be offering them.

There can be so many varieties in a bakery - from cakes to bread to lasagna. Which ones would be sold at Una's bakery may depend on what she's best at or what goes well with her positioning? Una's entire store can be a specialist in a single product, like Uncle Tetsu's Cheesecakes in Toronto. She may also decide to bake a vast array like many bakeries do. Once again, it depends largely on her target audience and positioning, which in turn depends on the demand and operational feasibility. Then again, Una may eventually see one particular expertise become an outright bestseller, demanding all her attention over everything else.

As with most things in the early stage of the brand journey, surveys, and other forms of user interactions can be key to determine products or features that could resonate with the target buyer. In the case of Una, her tryst with individual buyers can also serve as a great indicator for another opportunity. Let us say that a certain segment of buyers in the market, who appreciate good bakes, would not only like to buy it but also learn to bake it at home. Catering to this demand would imply Una setting up her own baking class, online or offline. She realizes that it could be an incredible personal branding hook that can impact the next three Ps.

### **6.2.2.2 Pricing**

Pricing is a key component of deciding and supporting the product you want to sell. Remember that any business' goal is to make money, responsibly. Pricing is determined by the following 3 factors:

1. The total cost Una incurs for each product/service. It sets the minimum bar for pricing.
2. The highest price Una's target customers are willing to pay for her product or services. It sets the highest bar for pricing.
3. The price charged by competitors or other similar products in the market. It guides the most realistic region between the lowest and highest pricing points.

If the ongoing market price is lower than Una's costs, she clearly has some cost-cutting to do. While this practice can ensure efficiency in Una's operations and business model, it is generally a one-way street and always poses a risk of Una getting priced out by an aggressive player with deep pockets. This is why invariably, the winners find a way to raise the perceived value instead, which is why we went through the Tier-I strategy.

The **Gabor-Granger** method is a simple mechanism to decide the price based on the customer's stated willingness to pay for a product. A survey can be used to determine this willingness at different price points. However, the willingness to pay can be a result of complex factors, including the perceived product quality. A product that is too expensive to one group can easily appear too cheap to another. Una's interest is only in her target buyer, and to arrive at an optimal price at such an early stage (with only a rough idea of the target), she can use other pricing techniques, such as conjoint analysis - a traditional statistical method that can look at comparables to deduce the right price point. The **Van Westendorp Model** is a more robust survey-led technique that can allow Una to ascertain what price points are too cheap, a bargain, bit of a stretch or too expensive, as shown in [Figure 6.3](#):

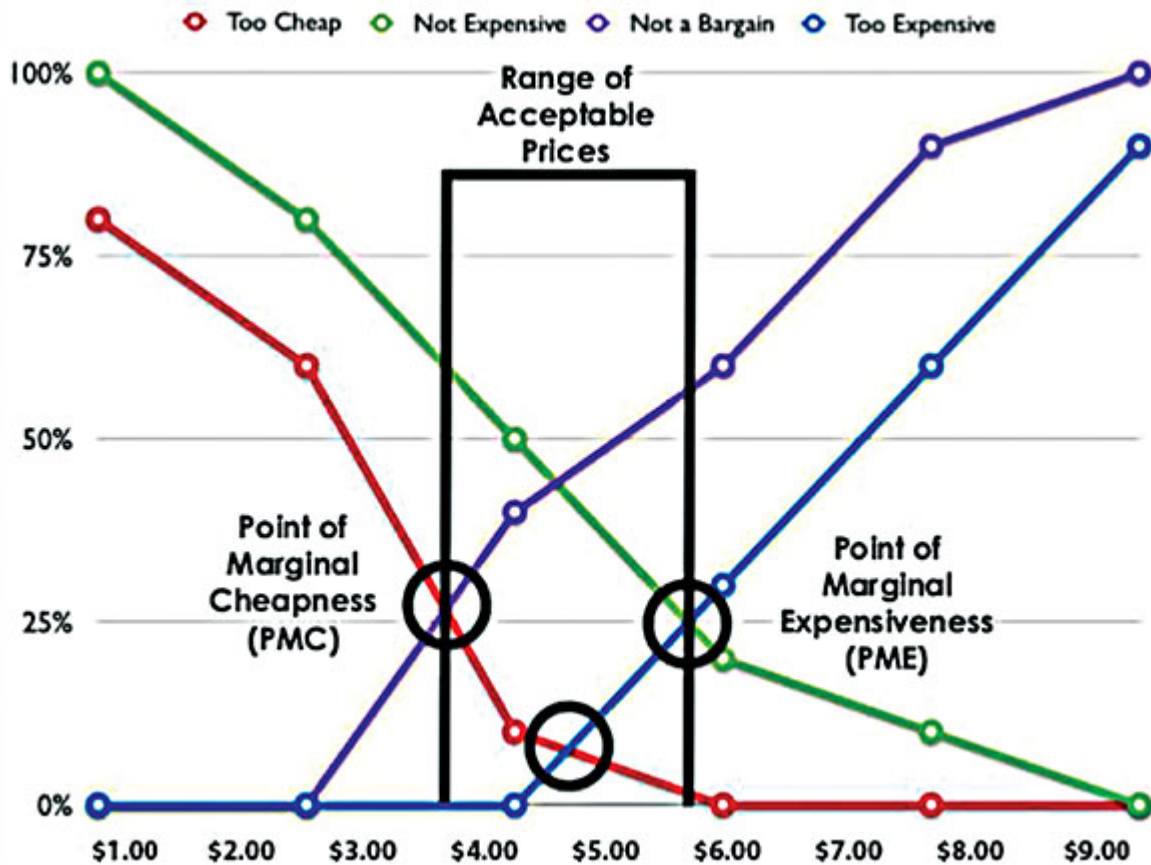


Figure 6.3: Van Westendorp Model Results on Pricing (7)

The flexibility in pricing depends on the product value, but even something simple as a static toothbrush produced in an environmentally friendly manner with bamboo can be seen as worth a 50% higher price - at least to those who care about environmental friendliness, and perhaps another segment that likes to use products that stand out.

### 6.2.2.3 Place and Promotion

These are two components that we will discuss in detail in the next few chapters. Place refers to the channels that Una decides to sell in; a handy tool that we will leverage later in the book. Simply put, the bakery is not the only place Una can reach her consumers. Online stores and indirect offline outlets are other options. Yet, the choice of precisely which channels to go for depends on the target audience as there is no point partnering with one where that target audience is not present at all.



More importantly, if Una decided on a premium experience, her store would have to be in an area those customers frequent. Conversely, she may not wish to opt for a luxurious gold-edged furniture and brand associations in an area that is not in the same league.

Place also ties into the Promotion to an extent as a means of announcing the product or service. Promotion is where the bulk of initiatives start to take place, as we will see in the next stage of a brand journey. Nonetheless, it starts by directly informing the brand elements too, as do the other Ps. Promotion is where Una can announce her value proposition and actively entice her target customers to choose her, and the elements Una associates with her brand should reflect that sentiment.

Tools that aid in promotion mostly deal with content creation, testing their impact on the target audience, and the consequent optimization. We will look at these tools in detail in successive chapters, including a deeper dive into neuroscience in the last section.

#### **6.2.2.4 People and Process**

As mentioned earlier, people and process are new, inward additions to the marketing mix, geared towards the responsible aspect of making money, or how you execute your 4Ps. They refer to managing the resources and supporting the brand execution in a way that keeps things organized and effective. We will learn more about this in [Chapter 10, Operational Alignment and Automation](#).

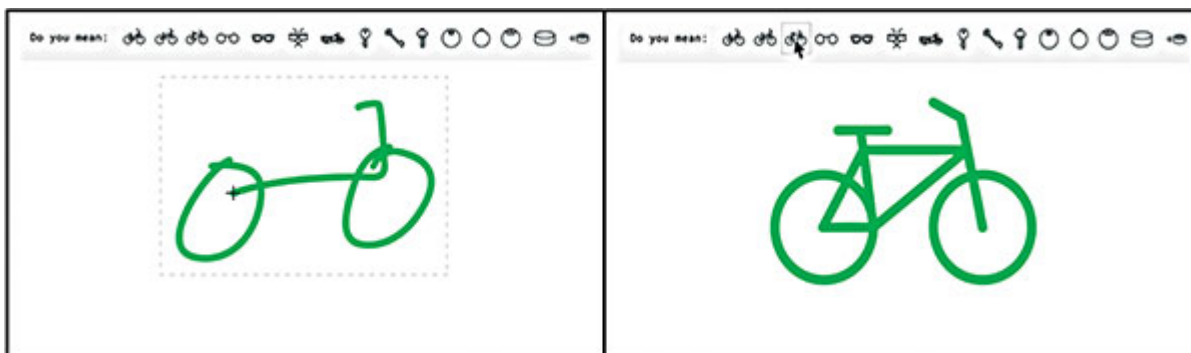
### **6.3 Defining brand elements**

So how do the two sets of strategies - Tier I and Tier II - inform the brand identity? Once Una has decided who to sell to, what to sell to them and how to sell it, her task is to now package all this with what we call the Brand Elements, which can include a brand name, logo, mantra/slogan, stories, URLs, symbols, characters, spokespeople, packages, and signage, as enhanced by Keller et al. (8). The look-and-feel components are largely informed by the kind of audience being catered to. For instance, Harley Davidson would likely neither opt for pastel colors nor the use of puffed font. Its brand identity is much tougher looking. You can also visit Apple's

website to see how it has carefully designed everything to exhibit one emotion above all else: simplicity.

A good way to sketch these elements is to do a bit of research on the multitude of studies that show the impact of different symbols, colors, and phonetism (pertaining to the sound of things) on the human psyche. Brand elements can cover a host of items, from the furnishing styles of the store to the colors, to the music or smell, to the taglines. However, the brand elements should always ensure a few things. The six criteria commonly referred to are: memorability, meaningfulness, likability, transferability, adaptability, and protectability. The first three help in increasing the brand equity while the other three help in sustaining it regardless of the changes in the organization or market. (9).

There are also a host of little tools to aid the design process. One quick example would be that of Google AutoDraw (10). (touted as an “AI experiment” at the time of writing) which can help turn rough doodles into pretty icons, as shown in [Figure 6.4](#):



*Figure 6.4: Google AutoDraw in action (11)*

This is something we will discuss in more detail later in the book when we talk about *Consumer Neuroscience and Neuromarketing* in [Chapter 14: Customer Onboarding](#). In the modern era, it is the most promising development that directly informs a brand’s look-and-feel across all touch points. Gradually, all brand elements will come to be informed by the use of this discipline.

### **6.3.1 Brand mantra**

Brand mantra can be considered a brand element only if it is explicitly shown. However, let us spare a moment to process it because whether it is explicitly used or only implied to influence a brand's approach, it is closely responsible for spelling out the product and positioning.

A mantra can often be a mission or vision statement depicting what Una builds, for whom and why. Mantra Maker ([12](#)) can help her arrive at her purpose-driven mantra through a series of questions that address these points. However, a *brand mantra* is slightly different and more a catchy slogan to reflect the brand accurately. A good brand mantra consists of 3-5 words and bears 3 components:

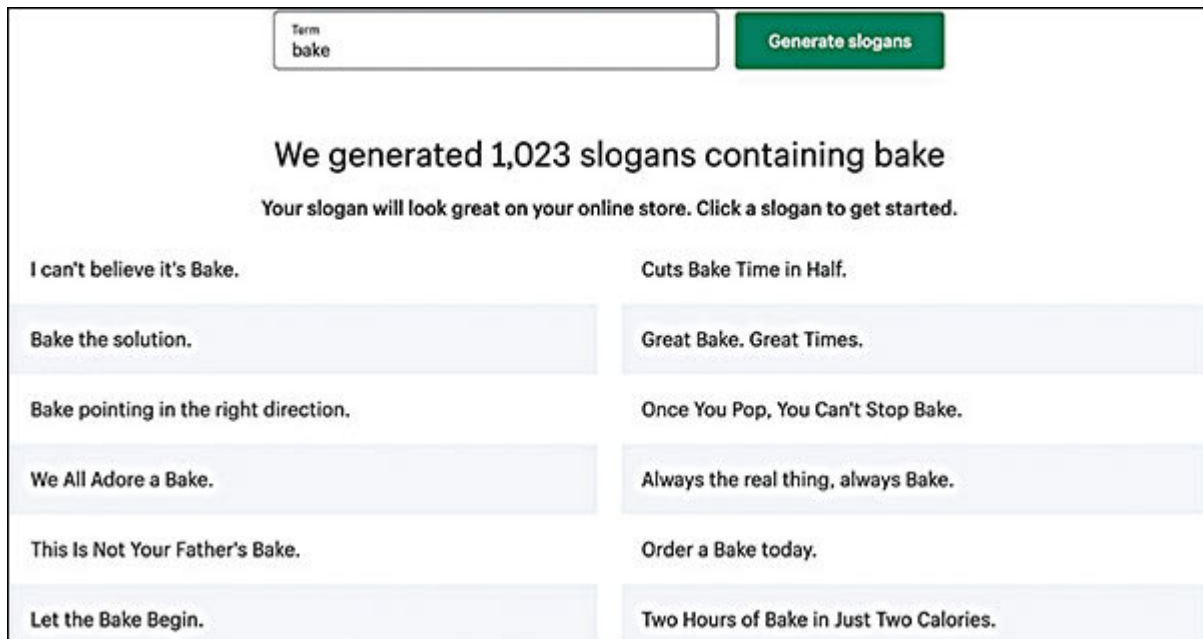
- **Functional:** which reflects what the brand does for the customer.
- **Descriptive:** which reflects what the brand is about.
- **Emotional:** which reflects the feeling or emotional value customers get from the brand.

In other words, the short tag line should be able to describe what the product or service is, what it does, and how it appeals to the unmet emotional need of the consumer. A mantra can also spell out what you stand for, particularly in case of a personal brand. Google went with “*Don't be Evil*”; Apple with “*Think Different*”. Brand mantra may even be implied in everything your brand does or associates with, rather than being literally spelt out. Disney is associated with fun (emotional), family (descriptive), and entertainment (functional). Brand mantra may even be apparent in the name itself, which is why “Una's bakery” may not be the best choice unless the name “Una” becomes a brand clearly associated with a specific emotional and functional message.

As an example, based on Una's strategy, her mantra could be something like “Make It Yours.” It clearly reflects the personalization she intends to put on her breads, the fact that something is being created, and that the creation is generic but is being turned personal. However, it's not entirely clear what is being created. Una could tweak the name to “Bake It Yours.” But as Toys”R”Us discovered in a non-English speaking Italy, care should be taken to avoid more complex wordplay as people may have trouble understanding it. How about “Deliciously Yours”? In two words, it reveals personalization and food, and even invokes a sensory positivity. Yet, if Una's position is to

offer great gift ideas to her consumers for their loved ones, a better choice still would be “*Yours, deliciously*”.

Una can also use one of several slogan generators online. One such example is the Free Slogan Maker (13) by Shopify, which can provide a handy guide with tons of options for any one word. [Figure 6.5](#) shows its sample set of results for the word “bake”. Una’s task would be to choose or modify the one most appropriate for her brand:



*Figure 6.5: Shopify’s Free Slogan Maker in action (14).*

When it comes to the brand name (and at times, the mantra), there is one other aspect that can influence these and that is the **search engine optimization (SEO)**. If the bulk of Una’s consumers have to find Una online from scratch, Una has to rely on how easily search engine algorithms can find her brand and surface it to the top of search results every time Una’s target audience looks for something specific that she provides. For starters, “Bake It Yours” might work better than “Yours Deliciously”. Then again, the customer could be looking for more than just “how to learn baking”; something like “delicious baking ideas”, or “unique bakes”. As we will see later, a lot of SEO is based on all the messaging around the core brand that Una puts on her website and beyond. But the name can certainly help - as long as it doesn’t sound too cheeky.

## 6.4 Conclusion

Brand identity formulation is a relatively manual process, but extremely important. It is equivalent to cleaning the house and dressing up before you invite guests over. When deciding how to design your brand identity, clarity on what you would like your brand to be perceived as or resonated with is important. That in turn depends on who you wish to target, which in turn depends on what their specific demand is, how big that market is, and what the operational and costing feasibility of catering to that demand are. This decision lies in the roots of your offering, which then allows you to decide on the specific way in which you will bring your product(s) to the market. A powerful initial differentiation can offer more flexibility in pricing, besides it being informed by the costs and the target customers' willingness to pay.

As we see in the next few chapters, both where you sell your product and how you announce it must go hand-in-hand with your intended identity. They inform and are informed by the brand identity. For example, you will likely not find a lavishly crystal-studded vanity mirror in a budget or mass-retailing department store. Such product placement will likely lower the product's perceived value, or simply fail to find the right target audience. In other words, the brand identity frames your entire market strategy and the company's ability to turn a profit. The brand elements represent and communicate the identity in a visual or perceived manner. Together, they should be able to depict what a brand is about, what it does for the consumer, and what feeling or emotional value it delivers.

To conclude, the brand journey is, at all times, about striking the right balance. And that is where many companies go wrong as they set out to make their brand visible. That will be our focus in the next chapter.

## Questions

1. All of the following options can potentially dilute the brand identity. However, which options will necessarily impact brand equity:
  - a. Change in how we segment our customers once it is decided.
  - b. For a particular type of customer segmentation, change in the segment we target.

- c. For our targeted customer segment, change in how we differentiate ourselves.
  - d. Since positioning is a combination of a brand's differentiation in a given category for a target customer segment, change in the positioning message without a change in either the differentiation, category or target.
2. A brand mantra ideally has a functional, descriptive, and emotional modifier. Which of the following statements are true?
- a. The modifiers can also be represented by other brand elements or associations.
  - b. A brand mantra has phonetic value (that is, it "sounds" good) when used as a tagline, but it can also have visual value (that is, they "look" good) when used through other elements.
  - c. A brand mantra should be at least 3 words long, so that all 3 modifiers are represented.
  - d. Long brand mantras are okay if they suitably communicate the three modifiers.
3. Tier-I strategy involves \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_ and \_\_\_\_\_.
4. Customers who fall in one segment will also be segmented together for a given product. Is this statement true or false?
5. Tier-I strategy is aimed at deciding how you will bring your brand to the market. Is this statement true or false?
6. The traditional marketing mix of 4Ps include \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_ and \_\_\_\_\_.
7. \_\_\_\_\_ and \_\_\_\_\_ are the new, inward additions to the marketing mix.
8. What is the correct order of the following statements?
- a. Tier-I strategy helps decide which demand a company should try to cater to.
  - b. Product validation stage helps understand the demand for different products.

- c. Tier-II strategy helps decide how the company should cater to the demand in focus.
9. The brand elements are most effective when they are consistent with each other and communicate the same message to the target customers, even if in an implied manner. Is this statement true or false?
10. In modern times, a brand name's discoverability on search engines is as important as its ability to be understood by different target customer groups. Is this statement true or false?

## Answers

1. B, C, and D
2. A and B
3. Segmentation, targeting, differentiation, and positioning
4. False  
Over time, certain segmentation may change, which is why they require periodic analysis. For instance, Maya and Alixia may have both liked Macbooks in the beginning due to its ease of usage. However, once Apple reduced the number of ports on the system, Maya may no longer find it easy to use due to the nature of her work, even though Alixia remains unaffected.
5. False  
Tier-I strategy is about deciding who to target and what value to communicate to them.
6. Product, price, place, and promotion
7. People and process
8.  $B > A > C$
9. True
10. True

## CHAPTER 7

# Brand Awareness – Web Presence

When it comes to promoting your brand, there is so much you can do, both in the online and offline world. But is it wise to do it all at the same time? The effectiveness, particularly in terms of achieving maximum ROI from any initiative, depends on its timing and prior preparation. That is why the act of promotion begins by first establishing a foundational digital presence. In marketing, every initiative acts as a stepping stone for another, while itself leveraging the results from ones that came before it. So, while going out to the market and announcing a product is necessary to bring in customers, strategically pacing yourself can yield rich dividends. Remember that the house has to be decked up and roles have to be set before the doors are opened and guests are invited in. That is what we will cover in this chapter along with the initial marketing techniques you can leverage to start building positive brand awareness.

### Structure

In this chapter, we will discuss the following topics:

- The act of promotion
- Stages of brand awareness
- Building your brand's visibility
  - Elements of an effective website
    - User experience
    - SEO-friendliness
    - Integrations
    - Increasing discoverability of the website
      - Search engine optimization
      - Leveraging vertical aggregators



## Objectives

This chapter initiates the art of introducing a brand to the target audience with the basic first steps that need to be in place for effective promotional strategies. By the end of this chapter, you will be able to understand the various stages of building brand awareness, learn how to start building your brand visibility, understand the elements that go into building an effective website, and learn how to drive discoverability of your website with the help of SEO and vertical aggregators.

### 7.1 The act of promotion

When it comes to promotion, or what is often erroneously interpreted as all of marketing, there is so much one can do both online or offline. For instance, Una can build an attractive website, be active on social media, run online ads, put out offline ads in newspapers and magazines, partner with restaurants, get featured by popular bloggers or influencers, participate in renowned baking competitions, or even make her bakery available on various other channels. What is wrong with doing everything at once?

Most customers who see discount coupons of Una's bakery ads in a newspaper but do not know anything about her and her bakes, may simply ignore it. Una's conversion rate (that is, the number of people seeing the advertisement who then turn into customers) on all the impressions (or eyeballs) that she gets in the newspaper would be far lower than what it could have been if people were more aware to appreciate the value they will be getting at a discounted price. The result: significantly lower return on investment (ROI) on Una's precious dollars.

Similarly, the industry influencers who are equivalent to modern day critics today and command hundreds of thousands of followers are not likely to pick a relatively unknown brand since they get a plethora of feature requests from entrepreneurs coming in every day. As a newcomer, Una would face an arduous task getting their attention and would likely hear back from significantly fewer bloggers or influencers than she could have with a little more strategic approach.

As mentioned earlier, Una can always bank on periodic surveys to test her brand's awareness levels. QualtricsXM provides a brand tracking research service that can produce easy-to-understand dashboards showcasing this. As shown in [Figure 7.1](#), such views can allow Una to gauge the effectiveness of the

promotions we will discuss in the upcoming chapters as well as changes in the awareness levels over time:

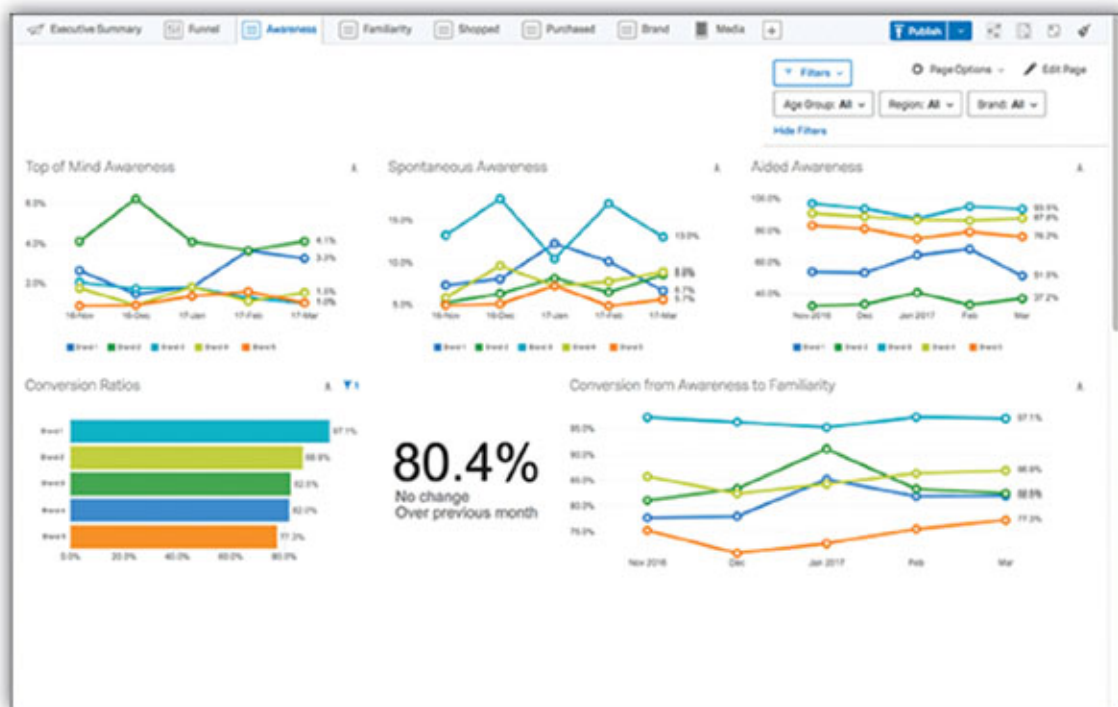


Figure 7.1: Qualtrics brand tracking research service dashboard (1)

Promotion is not just about coming up with great ideas. Their choice and timing demand a more strategic approach and is key to maximizing returns, which can be both positive and negative. Let us look at the show businesses industry to understand this.

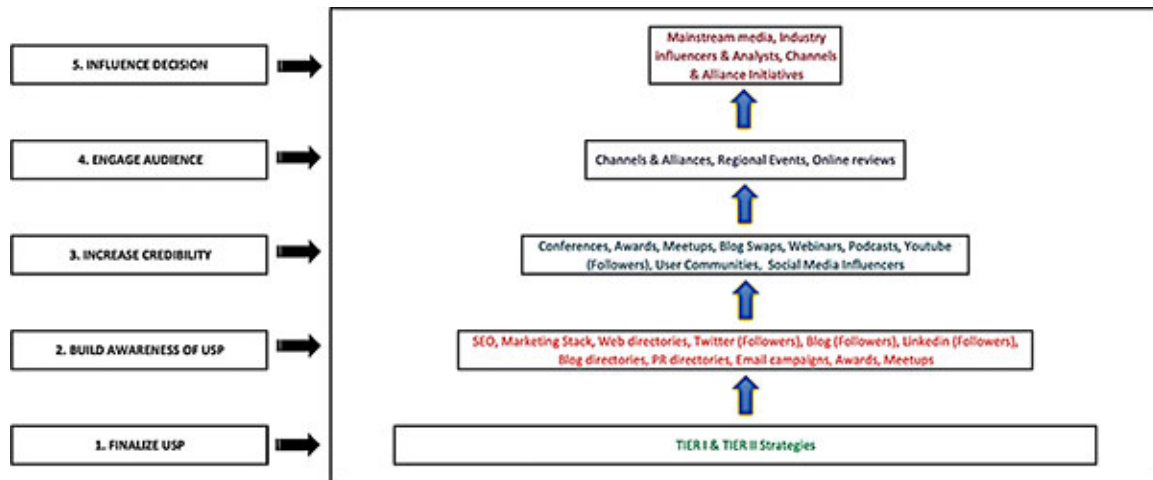
With regards to the timing, every marketer in the world times the social media posts and emails at strategic times in the week when the odds of getting online eyeballs and engagement are highest. But the importance of proper timing has traditionally best reflected in the movie industry where key dates are booked years in advance for major movie releases. Christmas movies are generally released only towards the end of the year while blockbuster movies shy away from a release during the Labor Day weekend in America. Teasers and trailers are released early enough to build a buzz but late enough to ensure the buzz doesn't fade away. Reviewers are invited to a pre-screening to leverage these influencers ahead of the main release. The main release itself is timed differently for different countries. And major film festivals are leveraged to build critical credibility.

The other aspect of promotion is the objective of awareness being built, which can be both positive and negative. And nowhere is it better on display than one of the greatest shows on Earth: the US election. The road to polling day is a long one, preparations for which begin months and years in advance as the candidates visit constituencies across the country, each involving focus on a different agenda. That's another great instance of customized promotion. But while candidates focus on building a positive awareness for themselves, they are just as focused on building a negative awareness for the opponent. In recent years, with the online shift of consumers, this process has become more and more consistent and online driven. That is where techniques like reinforcement learning come in which can help deliver real-time custom positive or negative behavioral ads to the audience based on who they are and what their preferences are. We will look at this in the next chapter. Nonetheless, just like with movies, rarely does a candidate have sufficient initial positive awareness and credibility to command majority support and interest. That process invariably involves work from ground up.

## [7.2 Stages of promotions](#)

The moral of the story is this: just like with a career, climbing up the ladder is a gradual process. Each channel or resource is influenced and driven by a certain motivation. Your choice of initiatives should be directed at fulfilling these motivations to get the most responses. So, people may follow you on social media if you have good looking products and an attractive website to back it up; little known bloggers may be interested in you if you have a good social media following; bigger influencers may get attracted to you if you have been featured on other websites and have some recognitions to your name, and your followers may buy from you if they see you praised by a known industry influencer. Accordingly, some channels and initiatives are better suited at the brand credibility stage, some at the resonance stage while others, early on at the awareness stage. Timing one's effort well is single-handedly responsible for making one's efforts more effective.

A great example is Maslow's Hierarchy of Needs, which shows how an individual's core needs evolve with time – from basic physiological needs of survival to security, to belongingness, esteem and finally, self-actualization. (2). Catering to a more evolved need is unlikely to appeal to an individual whose more basic or preceding need is not yet met. Similarly, when it comes to the brand journey initiatives, here is a sample model you can follow:



*Figure 7.2: A sample order of brand journey initiatives*

[Figure 7.2](#) is only a generic example of the order in which initiatives can be taken up in a typical brand journey of a new company. However, depending on the industry and product and organizational stage, the order can vary quite a bit.

An interesting point to note in the image is that promotional initiatives can be undertaken to satisfy a range of brand objectives. It is not only meant to increase awareness. There are promotions designed to increase brand credibility (such as those sharing proven benefits of the product, often seen in the cosmetics, health or pharmaceutical industries), to increase brand engagement (such as the shopping mall kiosks) and to promote loyalty (typically, ones with reassuring messages for existing customers, often seen in the banking or insurance industries). We'll take up each of these one by one.

## [7.3 Building your brand's visibility](#)

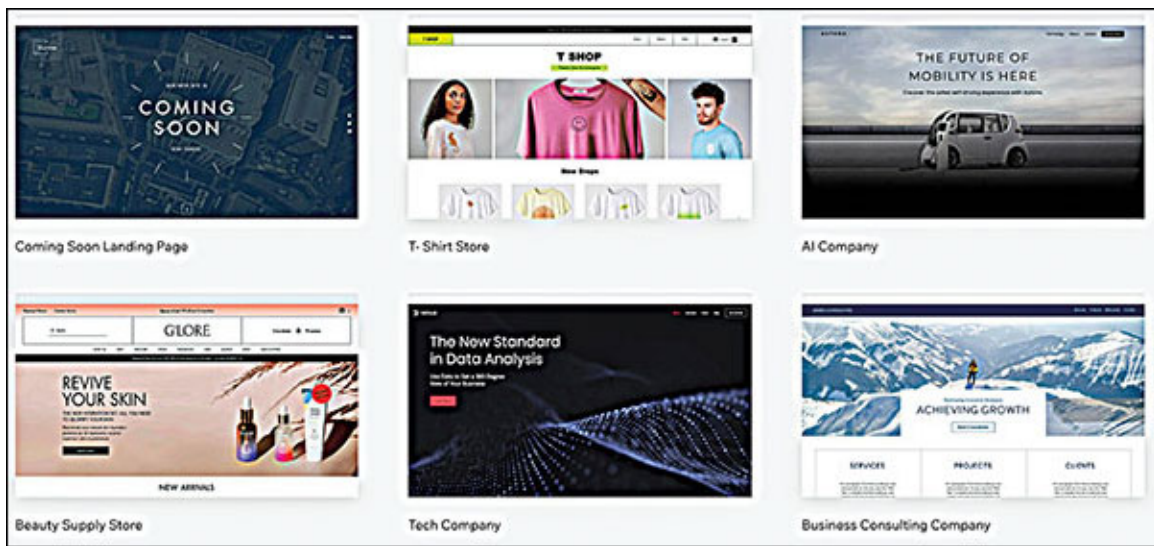
Attracting customers is about building positive awareness. In the first stage of building brand awareness, the objective is to achieve the following three milestones:

- Make the brand visible to the target audience and their influencers.
- Increase brand recognition where people recognize the brand when they see any of its elements or extensions.
- Increase positive brand recall where the brand is top of mind every time people think of anything related to the context the brand operates in or stands for.

This brings us to the question - Where can we make the brand most easily visible? A website comes first, thanks to it being a “home” for modern day brands online. The only exception tends to be for Apps which can directly launch on App stores. Nonetheless, a website can be helpful for them too, as we see now.

### 7.3.1 Elements of an effective website

As a starting point, Una can consider platforms like Wix, Weebly, or SquareSpace to design a website. WordPress is powerful too but better advised for big businesses or designers who know how to code. [Figure 7.3](#) shows pre-designed templates on Wix that Una can choose for her website, all responsive in nature, that is, optimized for both desktop and mobile viewing.



*Figure 7.3: Website templates on Wix (3).*

Setting up a website also requires taking care of basics that include:

- Responsiveness (as mentioned above)
- Domain name
- Web hosting
- Website & domain security and privacy
- SEO and analytics toolset
- Multiple language enablement

Today, most of these can be managed from a single platform like Wix. Once the basic structure of the website is in place, Una needs to decide on the pages and update the content with brand elements (pictures, text, etc.) in line with the brand identity she decided earlier.

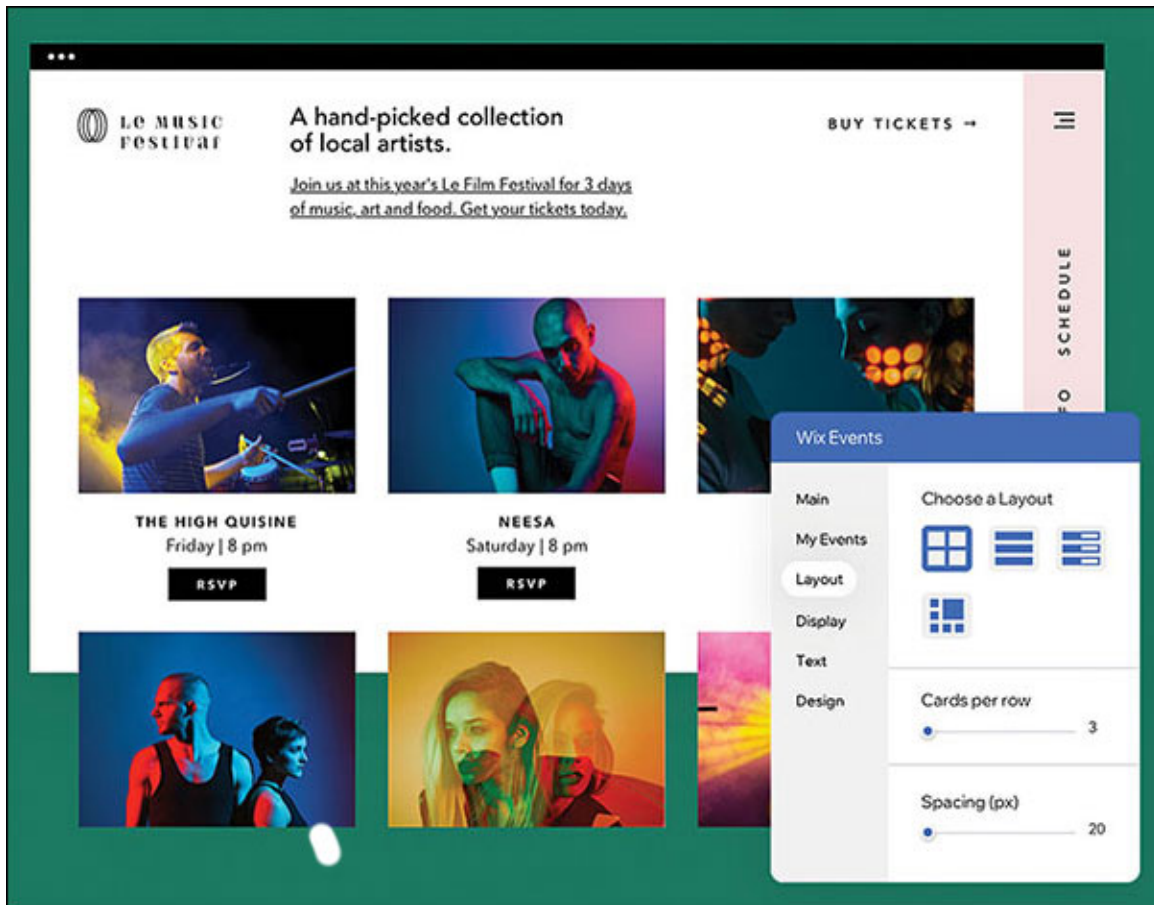
While an individual may prefer social media only, having a website can allow her to set up a permanent interactive home for all her content and start a blog too. These are sweethearts of the SEO world and greatly increase a brand's *findability*. The structure of a website evolves with time, but the simpler and cleaner it is the better. There are three components to consider on any website.

### 7.3.1.1 User experience

While your website may need multiple pages to address various products or services, three things have to be kept in mind in terms of the front-end design:

- **Attractiveness of the website:** This implies high quality pictures and simple easy-to-understand messages that highlight the most important information (position, customer reviews, samples, partner brands, etc.), lend clarity and offer a hook to keep the audience glued. The content and look-and-feel should closely follow the brand identity and the purpose the website is built for.
- **User Flow:** It is important to allow a seamless migration experience for visitors across the website. Visitors should easily be able to find what they are looking for and be encouraged to explore more. It is now recommended to put most content on a single, longer page. This is because with viewers predominantly using phones, it is easier to scroll down a page than to jump to a new page and back.
- **Call-to-action:** The website should also lead visitors to the action it wants them to take. Called CTA or call-to-action these are generally buttons that lead visitors to make a purchase, contact the company, follow you on social media, or subscribe to your emails and posts. Don't flood pages with these, but do include multiple CTA's, even repeating the same ones, at strategic points on the page.

Most of the content and enablement items on website building platforms are drag-and-drop. Una can place buttons, choose the style of buttons, pick layouts, and do much more without much training needed, as shown in [Figure 7.4](#):



*Figure 7.4: Customizing a website on Wix (4).*

Bear in mind that you or your team will need to manage this website on a long run, so the easier it is to manage and edit for everyone, the better it is.

There is no dearth of tools that aid websites, and some can take it to the next level. The best part of such integrations is that they are easier to put in place than one might think. Consider [Figure 7.5](#) from LiftIgniter's website:

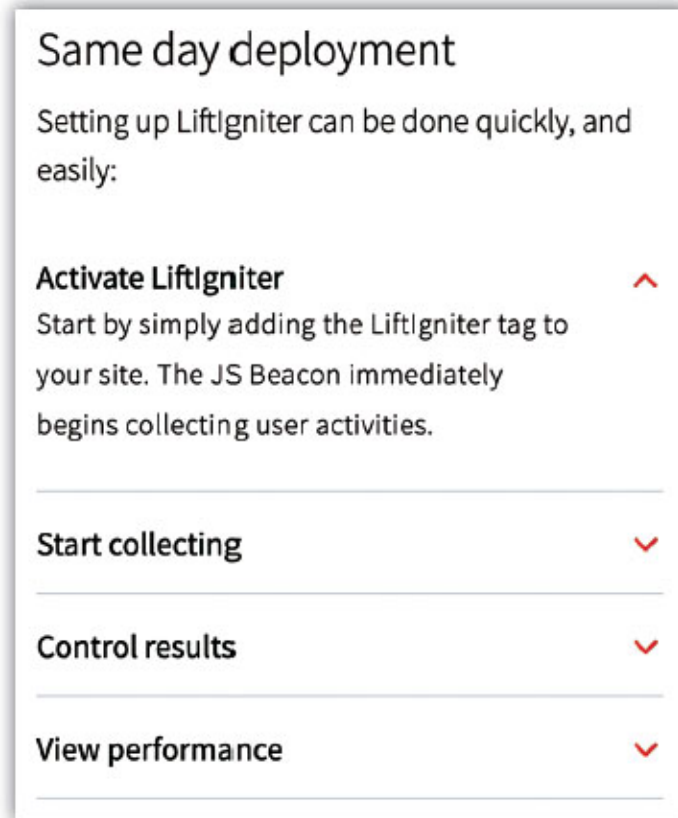


Figure 7.5: LiftIgniter deployment process (5)

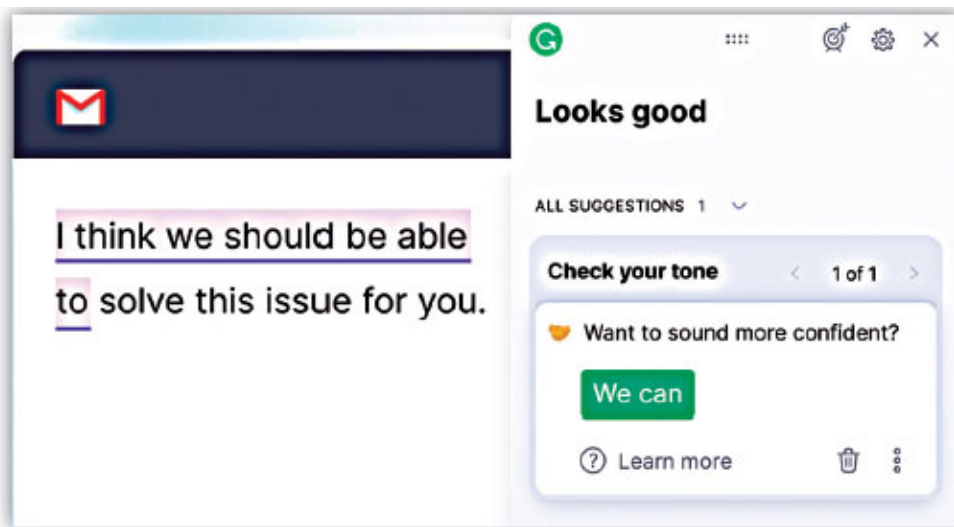
Tools like LiftIgniter (6) enable hyper-personalization of a website by allowing customized views for each visitor. Una can have complete access to user activity on her website – allowing her to place powerful content on it, control what they see, where they see it, and even optimize her website in such a way that it will have its own recommendation and discovery engine. Altogether, it can make for a more powerful and personalized experience for her customer on her website.

### 7.3.1.2 SEO-Friendliness

To begin, Una would need some research to find the most relevant keywords, i.e., terms that her target customers use to find what she is offering. This includes both her product and the context in which it proves to be valuable. For example, “*unique ideas for a birthday gift*” has nothing to do with breads, but it is most relevant to Una’s brand positioning. Context here is key because search engines now focus on intelligently determining what a searcher is looking for rather than a simple matching of words in the searcher’s search with those on a website. And as if that wasn’t difficult enough, Una also has to prepare for searches that are no longer typed but spoken!



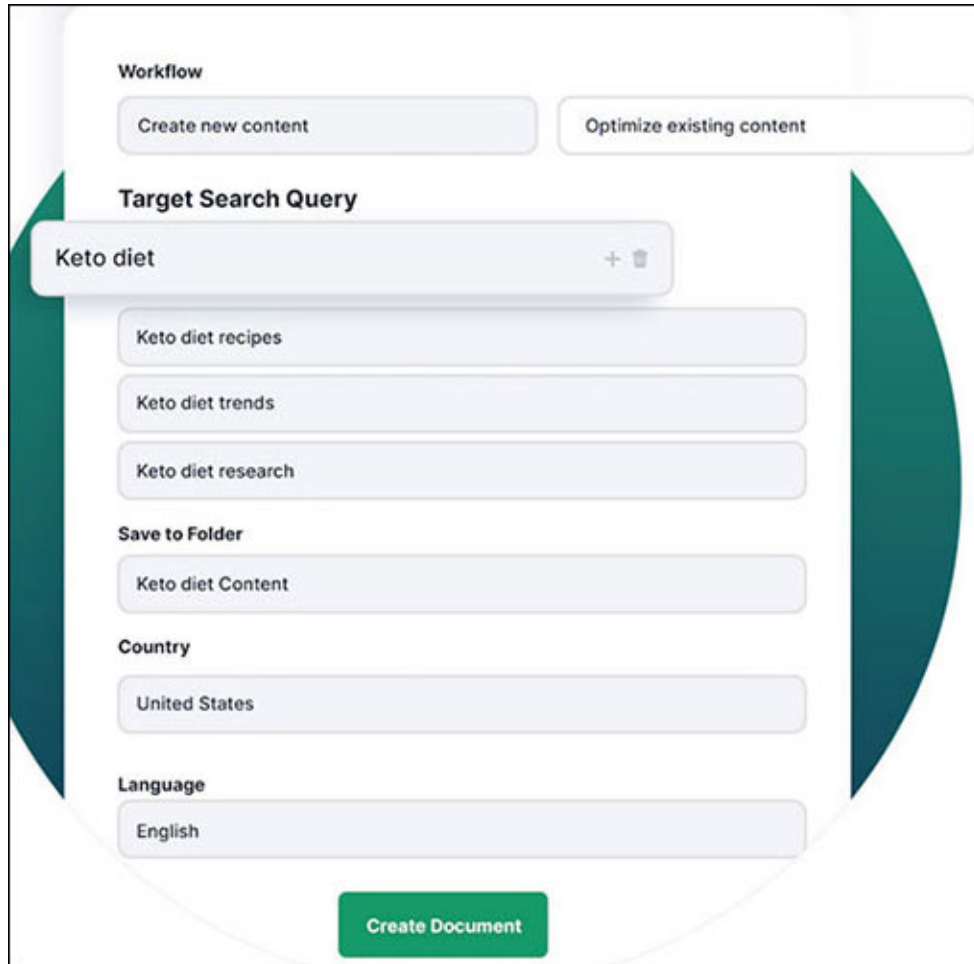
With the focus shifting to a user’s implied search versus literal search, AI-powered tools like Grammarly (7). (see [Figure 7.6](#)) and Hemmingway (8). can help assess the content on any page and recommend revised versions that suit reader tastes.



*Figure 7.6: Grammarly in action (9).*

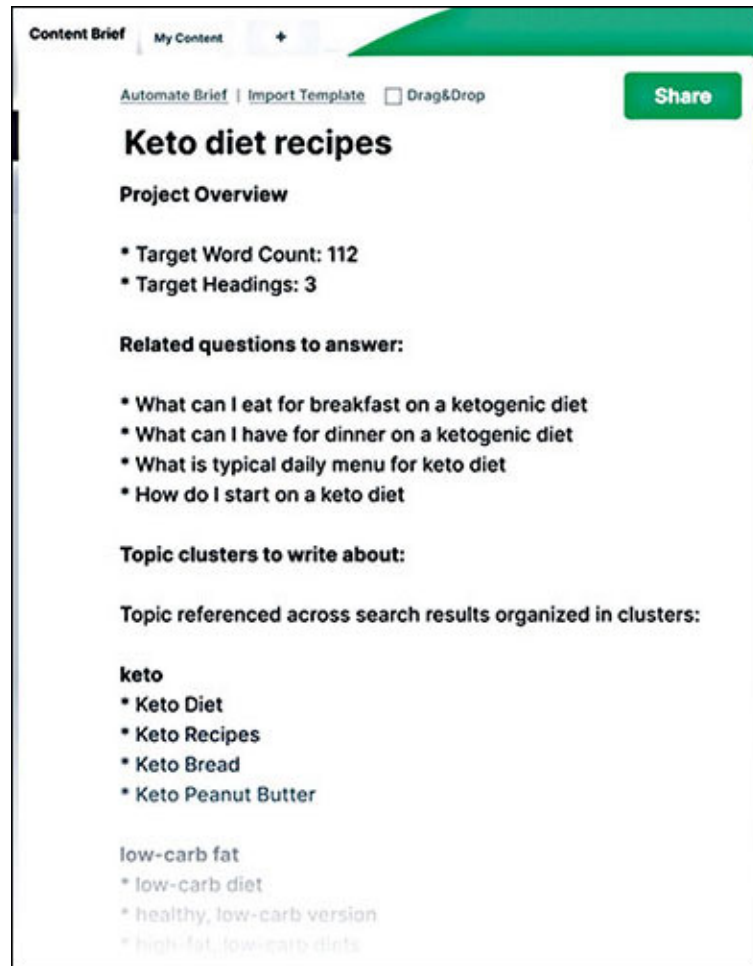
Both the front and backend of each webpage on Una’s website should be SEO-friendly:

- **Frontend:** It means having content that utilizes keywords and keeps visitors engaged with the page. Keywords could traditionally be found on Google AdWords, but today we have many more tools to help. Frase (10), as shown in [Figure 7.7](#), recommends keywords on a certain topic by also taking into account vocal searches, such as the questions we ask Alexa, Google Assistant, Cortana or Siri:



*Figure 7.7: Choosing keywords with Frase*

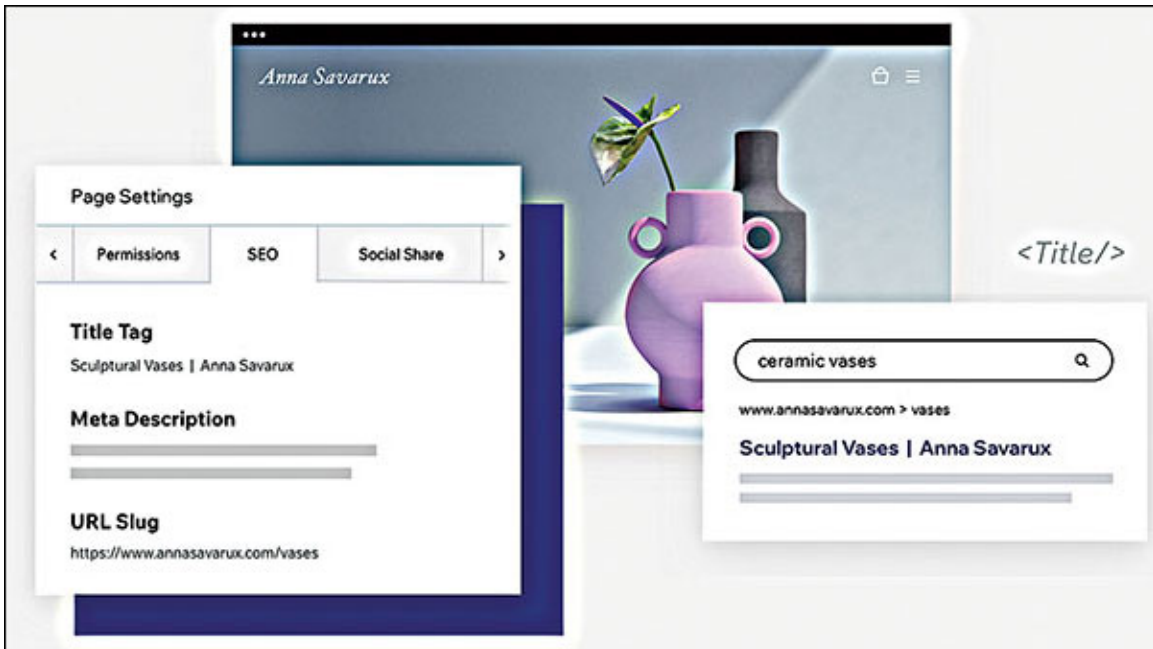
As shown in [Figure 7.8](#), it can also recommend related content and help optimize it based on user intent and readability by the voice devices, which will allow these virtual assistants to include Una’s information in their answers!



*Figure 7.8: Content recommendations from Frase*

Since context cannot be provided by multiple use of keywords alone, a blog, given its regularly updated content-rich nature, is a must-have for any website for precisely this reason. Remember that blatant and blind overuse of keywords to cheat the system can prove dear though. Bots also look to see if a term appears too many times - more than four per page is considered suspicious and Una's webpage may be down ranked.

- **Backend:** It involves having a suitable page title, description, and metatags, which contextually best reflect the webpage content, as shown in [Figure 7.9](#). Each of these directly help with the website's discoverability by search engines, which is its bread and butter. Even the images Una posts on the website should carry such details. There will be places where Una can customize the links for each page, add in web description (this is what shows up below each title in a Google search), the preview image for each page link, etc.



*Figure 7.9: Adding metatags to webpages on Wix (11).*

### [7.3.1.3 Integrations](#)

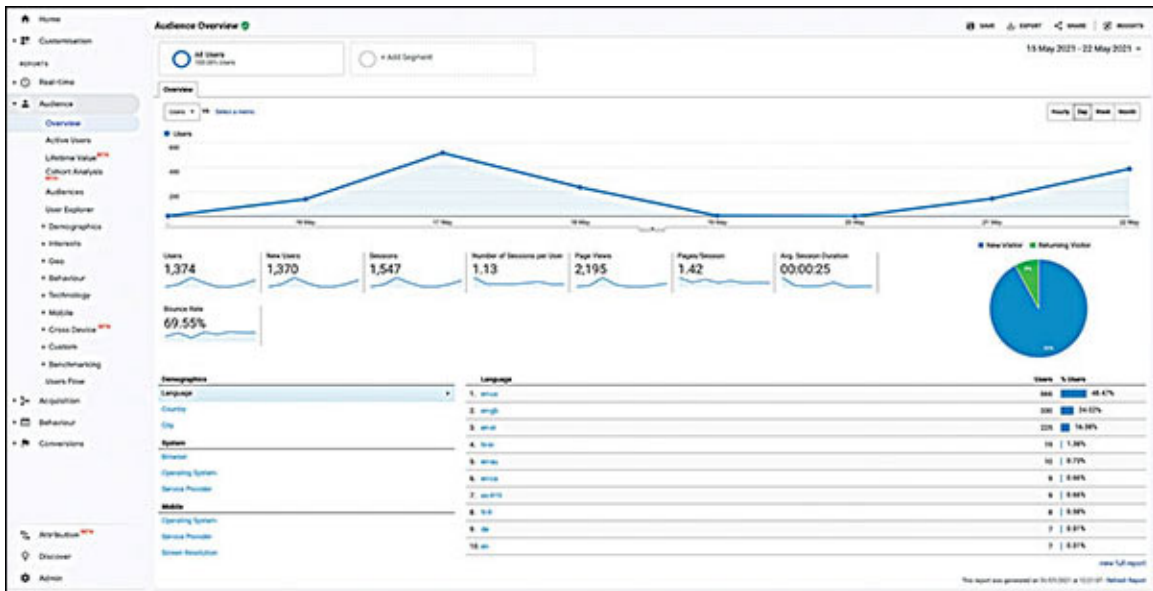
As mentioned earlier, integrations can seem daunting at first, given the use of unintelligible HTML codes. Thankfully, we live in a time where everything from website building to its many integrations have been made extremely user friendly. All you have to do is to not feel overwhelmed. Take it one step at a time and you will find that most of these are easy and can be learned in 4-5 simple steps by simply running a “*how to*” search on Google. For example, on the website builder platforms discussed earlier, each page comes with a dedicated header and footer backend where Una can paste codes from Google Analytics, AdWords, etc. after setting her account on these tools.

There are various types of third-party integrations that help a website. Some of the common examples include:

- **Google Analytics:** which tracks visitor behavior.
- **Google AdWords:** which can link the website to the online ads that Una runs on Google.
- **Google Tag Manager:** which can tag selective content on a webpage to track selective clicks or engagement. It typically integrates with Google Analytics and AdWords, allowing you to better track conversions.

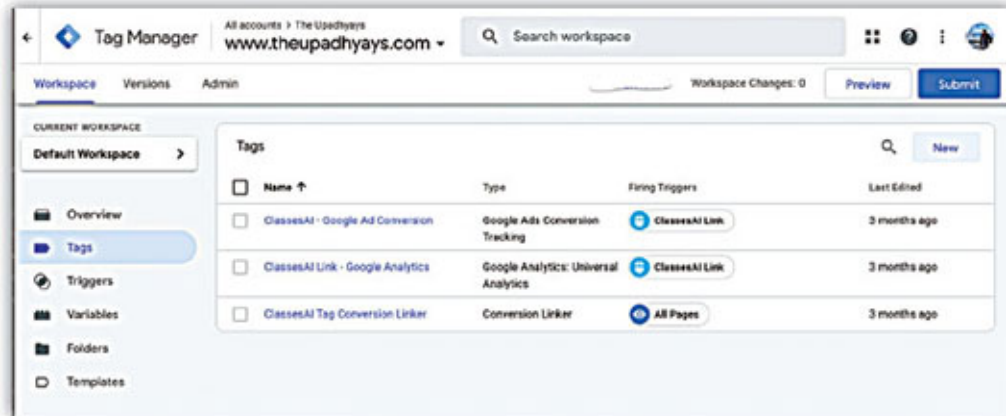
- **Google AdSense:** which can display third-party ads on Una’s website, thereby generating revenue from her online visitors. This is not generally advisable unless the business model supports generating revenue by promoting products from other companies on your website.
- **Social media or vertical aggregator widgets:** which can show reviews that customers post on those channels directly on Una’s website, and also enable direct purchase of her products on those channels.
- Other software that Una may use internally – from a database management system to a payment system. We will come to this in [Section 3: Winning the Customers](#).

As you can see, many of these integrations can be accessed through the Google suite of products. For instance, Google Analytics is quite comprehensive in the kind of insights it can reveal, as shown in [Figure 7.10](#):



*Figure 7.10: A sample Google Analytics view*

However, these products can be complex to manage or have their limitations. Consider Google tags, as shown in [Figure 7.11](#), which allow more selective and precise tracking such as clicks on a certain term within a webpage. These can be integrated with Google Analytics to enhance the latter’s ability to track user behavior. However, the set up can feel overwhelming for someone unfamiliar with managing tags, triggers, variables, and events:



*Figure 7.11: A sample Good Tag Manager view*

Speaking of limitations, Google Analytics cannot provide insights on historical data before it was integrated with the website or on related activity on other websites such as your social media. It also may not be effective in sampling data to uncover user behavioral patterns; at least until the website traffic grows fairly large. And finally, it cannot provide insights you can typically get from heat mapping, etc., which color codes certain behaviors based on volume or size. For instance, a heat map could show Una which part of her homepage users are looking at most and which part the least. This would have allowed Una to understand what content on her website catches more attention. Today, we can achieve this by leveraging the field of Neuromarketing – something we will cover later in this book.

Once Una becomes more comfortable with adding widgets and connecting different platforms, she may actually feel quite powerful in terms of the host of opportunities this opens up on what she can do with her website. It is nearly equivalent to installing apps on your phone to do different things. For instance, there are many demand generation tools out there that can find leads for a business - particularly applicable for the B2B aspect of Una’s bakery. They do so by either providing Una with contacts in her desired business audience segment, or by even determining their propensity to purchase through various signals in their behavior online. What Una needs to watch out for is stack fatigue, that is, having too many tools in the business. We will discuss this more in [Chapter 10: Operational Alignment and Automation](#).

One of the most common frontend integrations include chatbots. Today, these can do a world of good and also hold conversations on their own. For example, Drift ([12](#)) is a powerful AI tool that Una can use to start conversations with her website visitors with a more personalized experience. For example, say a

restaurateur sends a message on the chatbot enquiring about Una’s services. The bot can ask a set of questions to qualify the lead and then connect them with the right individual on Una’s team as she grows!

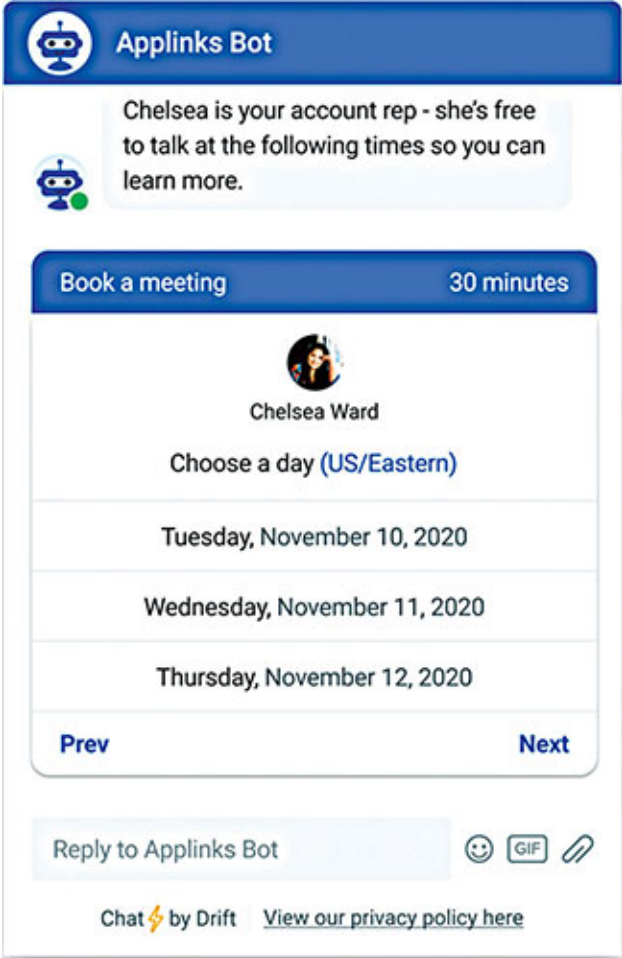


Figure 7.12: Drift’s AI chatbot in action (13).

Then again, there are technologies that can leverage Una’s integrations, including chatbots, to further empower her work. For example, PaveAI (14) will work with Una’s website to collect information from her various integrations, ranging from Google Analytics, Facebook Ad, Google AdWords, along with her other marketing channels to provide her with rich actionable insights on what’s working and what’s not, thus helping Una increase her ROI, as shown in Figure 7.13:



*Figure 7.13: PaveAI's actionable insights (15).*

We will discuss ads more in [Chapter 9: Brand Awareness – Online Ads](#) when we shift our focus from basic setup of Una's web presence to active promotions. Meanwhile, one other item to cross off is that having a custom domain email can be handy as it makes you look professional and enables you to engage your mailing list. Getting people to subscribe to your blog or email communication is extremely important to build this mailing list. Companies often try to build such a following by offering webinars or thought leadership content.

People subscribe to your content most readily when there is a tangible value in it for them. This value can be delivered by an asset that truly fills an immediate need. Una's asset can be a general discount code to her products, but it will only appeal to someone who is intending to make a purchase. What if she instead offered a free name-printed bake on that individual's birthday? That may become too tasking over time but is a trick many cafes choose today. Know that the asset need not always offer monetary value, but it must be something that can be truly considered an asset and hard-to-find elsewhere. In fact, the greatest value you can generate for your audience is by offering something you uniquely create. At its simplest, it can be your knowledge or experience in an area, which is where the webinars or podcasts come in.

## **7.3.2 Increasing the discoverability of a website**

**Search engine optimization (SEO)** and external channels are keys to how easily a website or brand content can be discovered. They need more work in their readiness.

### **7.3.2.1 Search engine optimization**

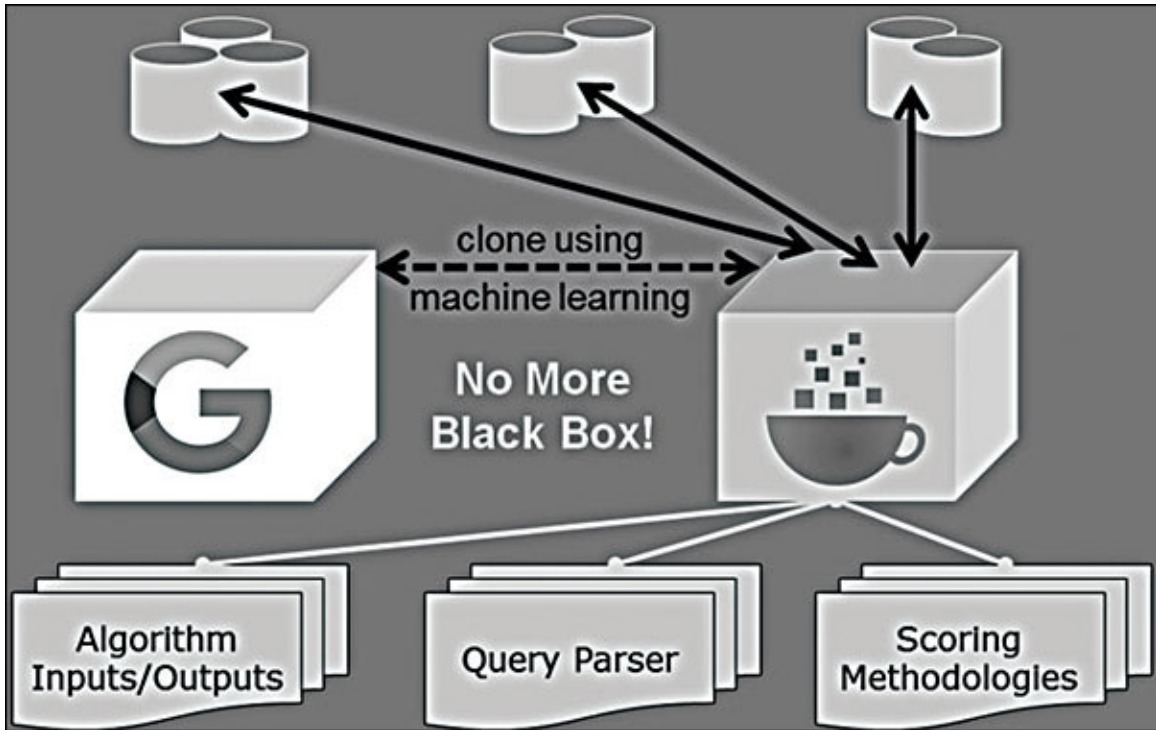
We spoke about a website's SEO-friendliness. Blogs, videos, and even the website we build must always keep search engines top of mind. Search engines have traditionally prioritized content to show to a searcher on three primary factors that are website-specific:



- **Relevance:** which refers to how relevant your content is to what a viewer has searched for. If Una's website were all about breads, search bots would find it irrelevant for someone looking for "unique gift ideas for a birthday" unless they found references to it on the website.
- **Frequency:** which corresponds to the legitimacy and popularity of your website, blog, or video channel. It is determined both by how frequently you post and how frequently the visitors view it. Once again, a blog allows you to regularly post new content, helping the case here.
- **Recency:** which is closely linked to relevance as it determines how recent and up-to-date your information is and how recent your visitors are.

Basic search engine algorithms or bots are designed to rank content that best meet these criteria. In recent times, though, advanced search engines have evolved to focus more searcher-specific factors than on website-specific factors. As *Neil Patel* succinctly lays out in his blog on AI and SEO, the focus is now on concepts, context, and customer satisfaction. [\(16\)](#) These terms deal with the AI bots trying to intelligently understand what the searcher is really looking for, why he or she is looking for it, and what would most likely answer the query. Such user intent cannot be manually inferred in real time, which is why Una needs to rely on AI.

Consider the search engine modeling technology provided by [Marketbrew.ai](#) which can allow Una to define, create, and deploy statistical replicas of any search engine environment. [\(17\)](#) More importantly, its replication can allow Una to know how certain changes to her website may impact her search rankings on Google; something she would only otherwise find out after days or weeks of deployment.



*Figure 7.14: Marketbrew's architecture for cloning a search engine (18).*

Plug it with a tool like BrightEdge (19), which can reveal what the customers are searching in real time, and even help devise content that contextually caters to those searches. In Figure 7.15, we can see real-time location-based search volumes on a keyword being displayed:

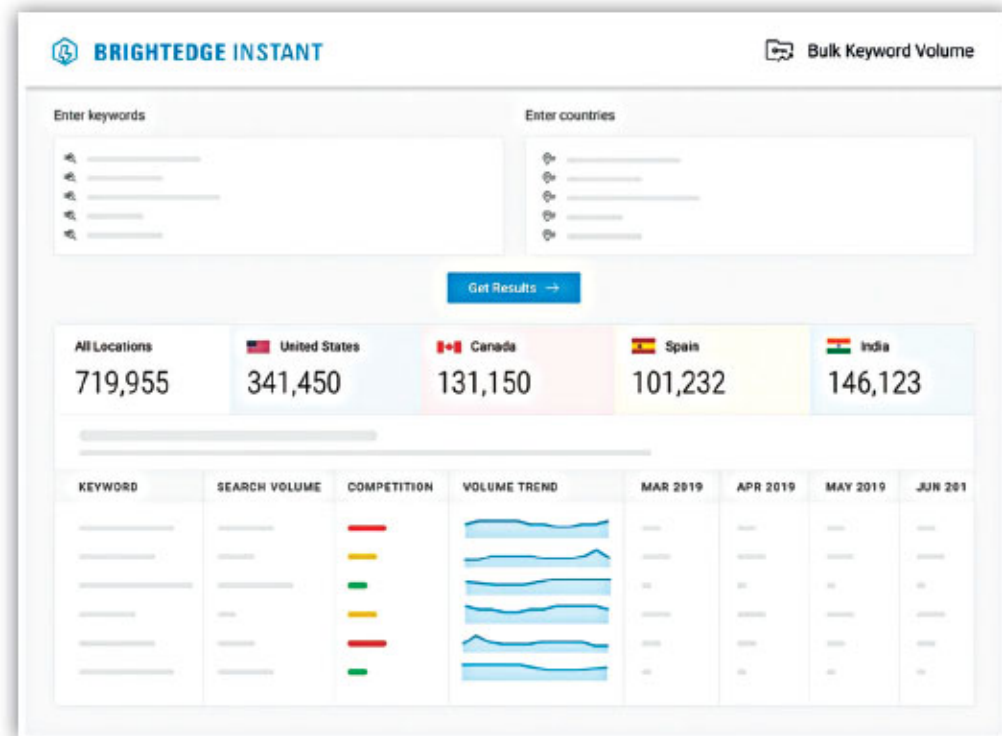


Figure 7.15: A sample UI from Brightedge (20).

**End result:** With the help of this cutting-edge AI software, Una will be able to accurately and efficiently learn about her webpages search rankings and how she can improve them by playing out various scenarios, ensuring only the most optimal ROI action plan!

Here's another tip to gain favor with the bots. In checking the popularity, one of the things bots will look at is how many external, unrelated websites send traffic to Una's webpage or video. That is achieved by external webpages carrying links to Una's content, which brings us back to the need to have other bloggers and influencers feature Una's bakes. But there is another approach that hits two birds with one stone: vertical aggregators.

### [7.3.2.2 Leveraging vertical aggregators](#)

A fundamental problem with trying to appear high in search results is that in most industries, you cannot beat the bigger, established players. For example, unless someone searches specifically for a detective on Baker Street in London and *Dr Watson* has already built a robust following for his blog, a present-era *Sherlock Holmes* may not necessarily show on top of the search results. But as they say, if you can't beat them, you should join them. In SEO, this implies

joining the vertical aggregators. These are listings, directories and resellers who aggregate all the players in a given industry to offer consumers the chance to explore multiple options and purchase from a single website. Think Expedia or Booking.com for travel-related options or Gartner for vendors in the technology industry.

There are four main types of aggregators you can find on the web: Organizational directories that list entire websites, Product/service directories that list specific products or services, Blog directories that list blogs on certain topics, and News directories that accumulate all recent press releases and news around a topic. Some even feature your listed content in their daily newsletters or social media posts, thereby exponentially expanding your reach. Some are free while others are paid. It is better to start and stick with the former at first.

Such aggregators list hundreds of relevant websites or webpages, each carrying active reviews from its customers. They would also allow Una to direct traffic to her website so that she can make it easier for potential customers to find her and also see reviews from existing customers. As a result, these vertical aggregators meet every criterion to top search results, unmatched by any one vendor alone, except the truly big, established brands.

Vertical aggregators can also favor Una's website or content positively by revealing backlinks to the search bots. Remember that the bots will reward Una's website when they find other websites directing traffic to her by listing her weblinks, an act known as backlinking. Once again, many try to cheat the system by adding comments on other websites or articles with their own weblinks. Some budding aggregators may also make it mandatory for Una to add the aggregator's website on her webpage.

### **7.3.2.3 Good ol' blogging**

Blogs are great for SEO, thanks to its regularly updated relevant content that is in the blogger's control. They also prove to be a great asset a business can utilize.

Just like with aggregators, visibility is served greatly by being featured on external websites. Blogs are a great way to enable that because you can feature others on your blog in return for hosting you. In terms of positive perception, this is powerful because Una can partner with smaller bloggers who are looking for more content to post and have more control over having positive words written about her. Since these bloggers are also at the early stages of blogging and do not generally have too many followers, they will appreciate writing about you

more than a popular in-demand blogger or influencer would. You may not get enough eyeballs immediately, but it will help with your search ranking. To aid this, you can also opt for a blog hop and a blog swap:

- Blog hop is when you “*hop*” on to multiple blogs for a feature, thanks to a particular content type that each of those bloggers would appreciate.
- Blog swap is when you feature someone else’s content in exchange for them featuring you. As mentioned earlier, this is often a win-win situation, as it builds a kind of community, helps with SEO and allows bloggers to leverage each other’s network of visitors and followers.

Recall from our discussion on AI, how it progressively learns and is already able to perform many tasks in marketing. OpenAI’s software GPT-3 can serve as our example here as an AI skilled enough to write its own blog! The blog post, titled “*Feeling unproductive? Maybe you should stop overthinking.*”, was produced by *Liam Porr* using GPT-3 and can be found at <https://adolos.substack.com/p/feeling-unproductive-maybe-you-should>. This one in particular achieved 26,000 visitors in a mere 2 weeks, enough to climb to the top of Hacker News! (21). For an AI that can also create codes on its own, this software is simply a sign of things to come in terms of automation, even though it is only available to beta testers currently.

Two things are missing in our discussion here: partnering with more affluent bloggers or influencers, and vlogging (which refers to video blogs instead of textual ones). In fact, for the latter, a case could be made that it would be easier to publish regular content on social media versus a website. However, we need to remember that our website is our home. There are three reasons you cannot ignore it in favor of social media:

1. A particular social media channel may be popular today but may fade away tomorrow. Think, MySpace or Orkut. Or even the recent shift of the younger generations from Facebook to Snapchat to TikTok.
2. While social media may be quicker to gain followers, they may not help with visibility on search engines due to the intense competition for similar content on these channels.
3. Old content tends to disappear on social media feeds quickly but remains accessible on a website.

Nonetheless, social media and the avenues it provides for creative blogging and online ads cannot be ignored. In fact, with her foundational web presence now

set up, it is time for Una to turn her focus to these. This is because SEO is a long-haul strategy. In the short run, paid advertising mechanisms like Search Engine Marketing and Social Media Marketing would bring quicker results. We will look at these in the upcoming chapters.

## **7.4 Conclusion**

In this chapter, we dealt with establishing a business' foundational digital presence, before we begin promoting it aggressively. While the website helps build visibility, search engines help bring the brand to the fore and increase its recognisability. The former is a brand's base station in the modern era, but it's the latter that will help others find it. Effective websites require a smooth user experience in navigating the pages and assimilating the information a brand wants them to. That is determined by not just building an attractive and easy-to-read website but strategic placement of call-to-action buttons or messages to guide the user flow and action. The website should be SEO friendly for easy finding by the search bots. It should also carry integrations which serve as the website's armor, empowering it with critical information and automations.

Search engines have traditionally ranked a website based on relevance, recency, and frequency of both visitors and content. In the modern era, search engines are shifting from being website-focused to being searcher-focused and are now trying to predict what a user really wants by looking at metrics like concepts, context, and customer satisfaction. Blogs or vertical aggregators help with the search as well as with building a positive perception to aid recall. There are aggregator channels for websites, organizations, offerings, blogs, and press releases, for instance. Blogs in particular are handy because they put content control in the hands of the organization. One can opt for blog hops or swaps for added visibility and tapping into the audience of other networks. It is generally better than relying solely on social media because a blog doesn't go out of fashion the way social media can and allows a unique, controlled space for the blogger's content.

Yet, it is time to give social media and online advertisements due consideration. Moreover, there is much that Una can do offline as well to increase awareness. Let us now turn our attention to those elements and understand why they come next in line.

## **Questions**

1. Which of the following statements are true?
  - a. Positive or negative brand recall always comes after recognition.
  - b. It is important to focus on first building recall before building positive recall.
  - c. Recognition needs a brand to be mentioned in some form but recall doesn't.
2. Bigger industry influencers are more likely to feature a brand that has already been featured or recognized by other bloggers or channels. Is this statement true or false?
3. For an effective website \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_ are three key elements to manage.
4. For a great user experience, \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_ are three key elements to get right on the front-end of a website.
5. Search engines have traditionally prioritized content based on the website-side factors. These are: \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_.
6. Search engines now utilize AI to prioritize content based on the searcher-side factors. These are \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_.
7. A key to building a good mailing list is to incentivize potential subscribers with an immediate tangible value. Is this statement true or false?
8. Which of the following can help increase visibility of a website?
  - a. Listing on the vertical aggregators.
  - b. Significant use of keywords on a webpage, say, more than 5 times.
  - c. Being featured on external websites.
9. Four popular types of vertical aggregators in any industry include directories that list: \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_.
10. Two ways of leveraging a blog channel with other bloggers include \_\_\_\_\_ and \_\_\_\_\_.

## [Answers](#)

1. A and C
2. True
3. User experience, SEO friendliness, integrations
4. Attractiveness, user flow, call to action
5. Relevance, frequency, and recency
6. Concepts, context, and customer satisfaction
7. True
8. A and C
9. Organizations/websites, products/services, blogs, press releases/news
10. Blog swaps and Blog hops



## **CHAPTER 8**

# **Brand Awareness – Social Media**

The first phase of brand awareness dealt with establishing Una's web presence and visibility. People will only take an active step towards us if there is at least some degree of perceived positivity and visibility around our brand, or if the topic is truly engaging. This is why sprinkling our content across our website, aggregators, blogs, and the overall search engine was the first step. Having positioned ourselves on these pages, it is now time to go closer to the audience. The next phase deals with initiatives that enable ongoing visibility and engagement with the target audience. For example, social media is the first initiative among the ones discussed so far where the audience has an opportunity to do something. We need them to follow us, share, or react to our posts. Online Ads fall in this category too, but will be covered later given their scope.

### **Structure**

In this chapter, we will discuss the following topics:

- Content that trends
- Diversity in social channels
  - Instagram
  - Twitter
  - LinkedIn
  - YouTube
- Recognition marketing

### **Objectives**

By the end of this chapter, you will be able to understand whether social media is necessarily good for you, how to make your social content trend, how to optimize your social channels, and how to leverage the power of video marketing for B2B and B2C audience – all of which will set Una up to leverage

ads and other investments later. The chapter will also elucidate the importance of recognition marketing.

## 8.1 Content that trends

When *Patrick Quinn* died at the age of 37, the tragedy was covered by global media. Few knew that name until they saw the articles. Fewer still knew that he was suffering from Lou Gehrig's disease, or amyotrophic lateral sclerosis. Yet, Patrick's contribution to the world becomes immediately clear when we hear the more popular acronym of the disease: ALS. Most of us can easily associate the disease with the viral Ice Bucket Challenge of 2014 – a campaign that helped raise more than \$220m for medical research into the disease. (1) The global trend beautifully underlined the role of social media in taking content viral and spreading awareness of a brand. Now, contrast that with a viral Peloton ad that was denounced by the public for an alleged sexist fitness message where a seemingly fit mother nervously undertook a year-long morning regimen of exercising on her fitness bike. (2)

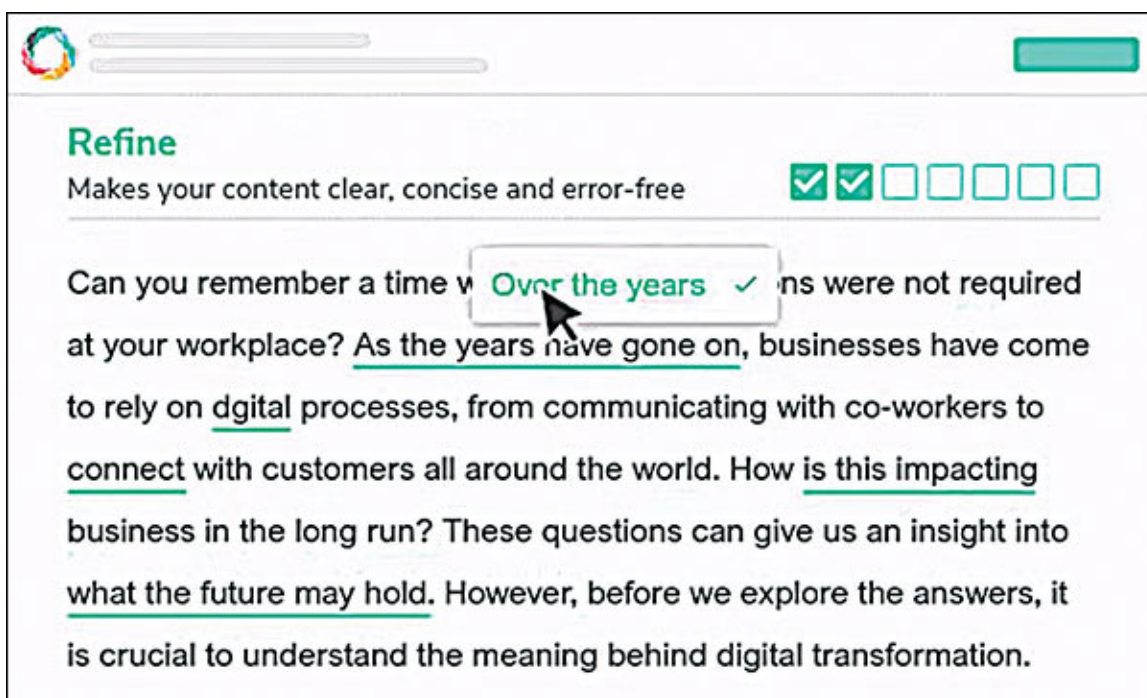
Two examples of viral content on social media, both related to health but with wildly different outcomes. What was so different about the two? At first instance, one could argue that the Ice Bucket Challenge (let's call it IBC) involved celebrities positively endorsing it. But as we saw with Gal Gadot's 2020 celebrity *Imagine* video during the early days of Covid19, even her well-intended initiative met with a backlash. (3) The IBC had gained popularity when *Peter Frates*, the former captain of the Boston College baseball team and an ALS patient, had posted his ice bucket challenge online. The Peloton ad took off when one user tweeted his discomfort with the ad three weeks after the original launch. In other words, the instigators in both campaigns weren't particularly celebrity profiles.

The first difference between these positive and negative viral videos was authenticity. Both the Peloton ad and the *Imagine* videos failed to meet the mark because while one tried to impose fitness on an already-fit woman, the other preached staying at home which, for most viewers, was not nearly as lavish and comfortable as for the celebrities who featured in the video. The second difference was in the nature of the **call to action (CTA)** to quote the website user experience criteria mentioned in the previous chapter. Among the three videos, only the IBC had a CTA that fused fun with a genuine cause – a win-win feel-good option for the user. Users would gladly choose between the kid-like

joy of pouring cold water or donating to a cause. In fact, one could replace ALS with any other equally serious disease and the IBC would still likely work.

Utopia on social media is to have a post go viral for the right reasons. Viral content often has similar attributes but requires luck. That is a function of relevance and timing. Ensuring positive audience reception also requires more than just good intention. But while viral content is Una’s target on social media, her first step is to get closer to her audience on these channels, which requires her to do some homework. For instance, it is important to track words, phrases, or brands being discussed by people and to leverage them to discover opportunities or create relevant and timely content for those audiences – something referred to as social listening. This is different from the keywords that aid search engines in being more time specific and current versus something generic.

In the previous chapter, we talked about tools like Grammarly and Hemmingway and how they help one write better. We now look at developing content that is better for the specific audience segment being targeted. After all, even content written in perfect English may be too verbose or academic for a group that prefers something casual. Tools like Atomic Reach (4) can analyze people’s behavior to suggest improvements in content based on what has worked with that specific group in the past, thereby increasing the reach and ROI. The UI for this particular tool can be very similar to the ones we saw earlier, except for the edge it provides with target profile intelligence:



*Figure 8.1: Atomic Reach in action (5).*

Concured (6) takes it a step further, by enabling one-to-one content experiences at scale. It has visibility into the target's profile preferences from multiple sources like the competitors, social media, publishers, SEO, partnerships, relevant brands and of course, your organization's in-house analytics.

While all such channels are a great source to gather insights, many are also relevant to build visibility. When it comes to social media in particular, the choice of channels too depends to an extent on where Una's customers are, as well as which channels she can manage without support when she is starting off. That depends a lot on the content and audience type. Remember that it is largely in the hands of social media algorithms to decide which content shows up first on other users' feeds when they log in. How does one determine what content works and what doesn't? The armchair way to figure this out is to use tools like Cortex (7) which can help suggest social media content, including color, choice of picture, etc. that will appeal better to one's followers (see [Figure 8.2](#)):



*Figure 8.2: Comparison of two brand images on Cortex (8).*

As [Figure 8.3](#) shows, data from multiple sources (including social media channels) on user engagement allows Cortex to cluster image categories and reveal the expected lift in engagement with each cluster for a given audience group:



*Figure 8.3: Cortex's analysis of the impact of different image clusters on engagement (9)*

We will talk more about using computer vision to assess images based on their attention-grasping power on the topic of consumer neuroscience in the final section. For now, it is important to know that just like with search engines, content prioritization by social media channels is decided by the following:

- Relevance of the content in terms of the viewer's interests, which includes content coming as an existing connection that a user seems to be more interested in. The latter can supersede the next two factors.
- Engagement levels on that content in terms of likes, comments, and shares.
- Recency, or how recent and up to date the content or its engagement with an existing connection is.

How does one ensure compliance with these factors? A straightforward way is to keep track of content and developments related to a certain topic that are trending on social media. Tools like **FindTheRipple** (see [Figure 8.4](#)) automate this with alerts or on-demand recommendations on new trends before they properly catch on, allowing marketers to jump into the mix with current content that has far higher odds of engagement, given its immediate relevance:

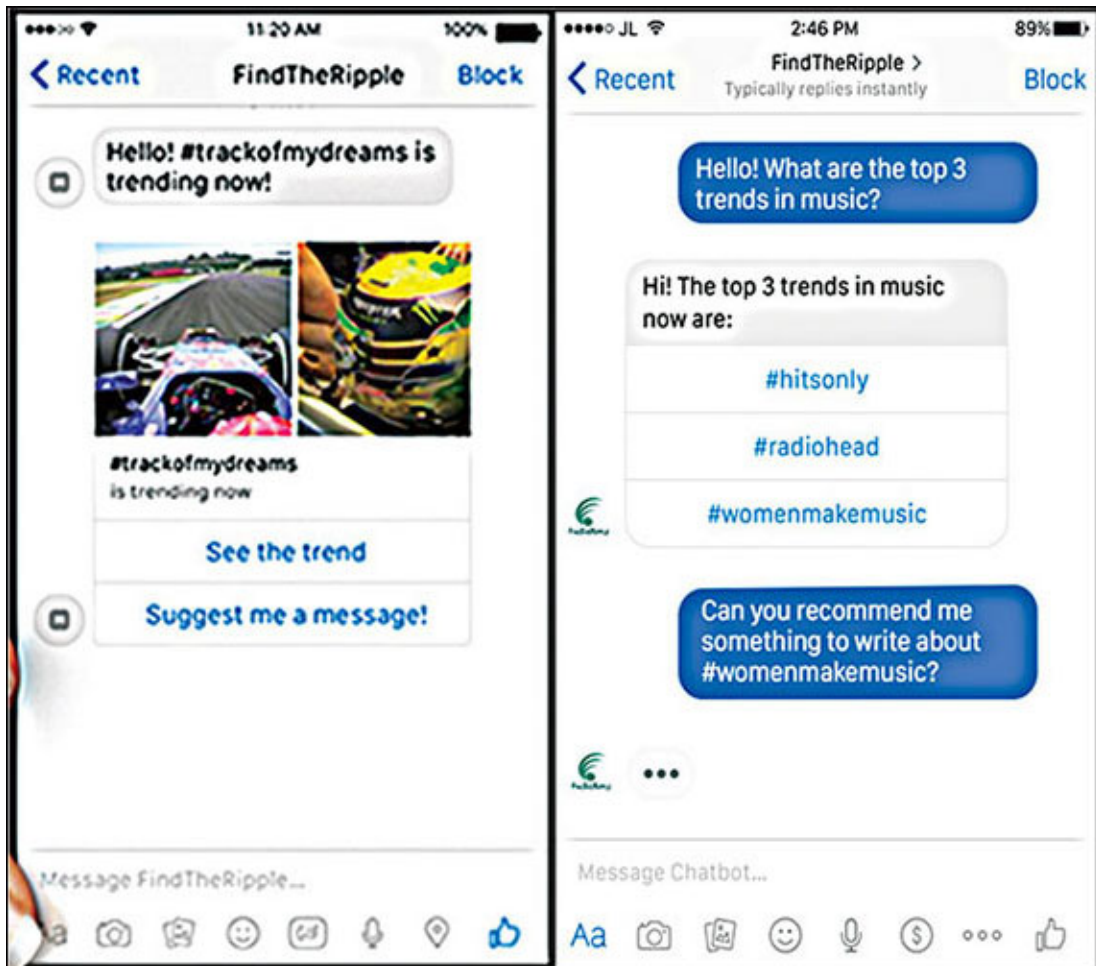


Figure 8.4: Alerts and Recommendations on FindTheRipple

## 8.2 Diversity in social channels

Each social media channel works differently. While the initial aim is to increase ‘target’ following, simply increasing the number of followers – targeted and untargeted – also creates a positive impression. Now, the primary appeal of Una’s bakes is in how good it smells and how good it looks. While the audience can only assume the former, the latter can certainly be proven online on channels that focus on visual content. Smell, meanwhile, would have to relay either indirectly through images or through feedback from Una’s first patrons.

Different channels also require different ways of using them effectively. With new social channels coming up every now and then, it is impossible to cover all. But let’s look at four examples that summarize the variety of social media content: pictures, text, videos, and the use of these in B2B.

## 8.2.1 Instagram

For products with a high visual appeal, Instagram is a great resource. To make this channel work, a set of steps must be followed:

1. Una can start by tweaking her profile's basic details to be compliant with her brand positioning. These include:
  - A captivating profile pic. In Una's case, it can be her brand logo or her own picture in a baking suit and chef's hat holding a delicious treat in her hand.
  - Description clearly outlining her brand position.
  - Engagement links such as the website, email address and/or other contact information.
2. Next, Una will need to create a theme for her visuals. Does she want to have her profile follow any specific color theme or sequence; Does she want the background in every image to be white so that the baked goods grab attention versus their surrounding; Will things be shot in a flat lay style or some other way; and so on.

Imagine using Deep Dream Generator [\(10\)](#), which leverages neural networks to generate enhanced content, say, by merging an artistic style of a painting on an image of Una's choosing. That is effectively an equivalent of a bread imagined by Van Gogh! [Figure 8.5](#) shows the result of combining a flying bird and fire images:



*Figure 8.5: Results from Deep Dream Generator (11).*

3. Una then needs to create a stock of images followed by a schedule for them to get posted on her profile. It is recommended that you post at least 2-3 times a week on Insta so that the Insta algorithms mark your profile as one of the more active ones. Of course, as mentioned earlier, this will be coupled with other factors like the engagement on your profile, etc.
4. Tagging is also a crucial bit. In Una's case, it would be helpful for her to tag her clients, other major restaurants or hotels, baking or cooking magazines, bloggers and influencers. This will help her posts pop up in more news feeds and also get her more attention and media coverage.

Choosing the right hashtags is crucial for relevance and visibility. Thankfully, tools like InstaLoadGram (12) can come to the rescue by generating niche hashtags for any image Una wants to upload, as shown in [Figure 8.6](#) and [Figure 8.7](#):



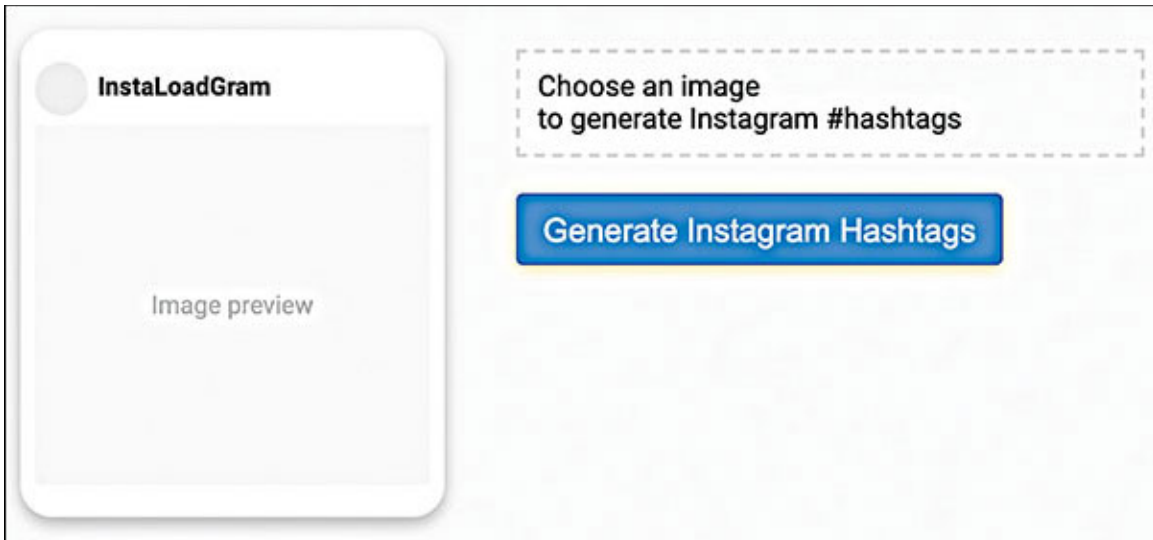


Figure 8.6: Opening screen on InstaLoadGram (13)

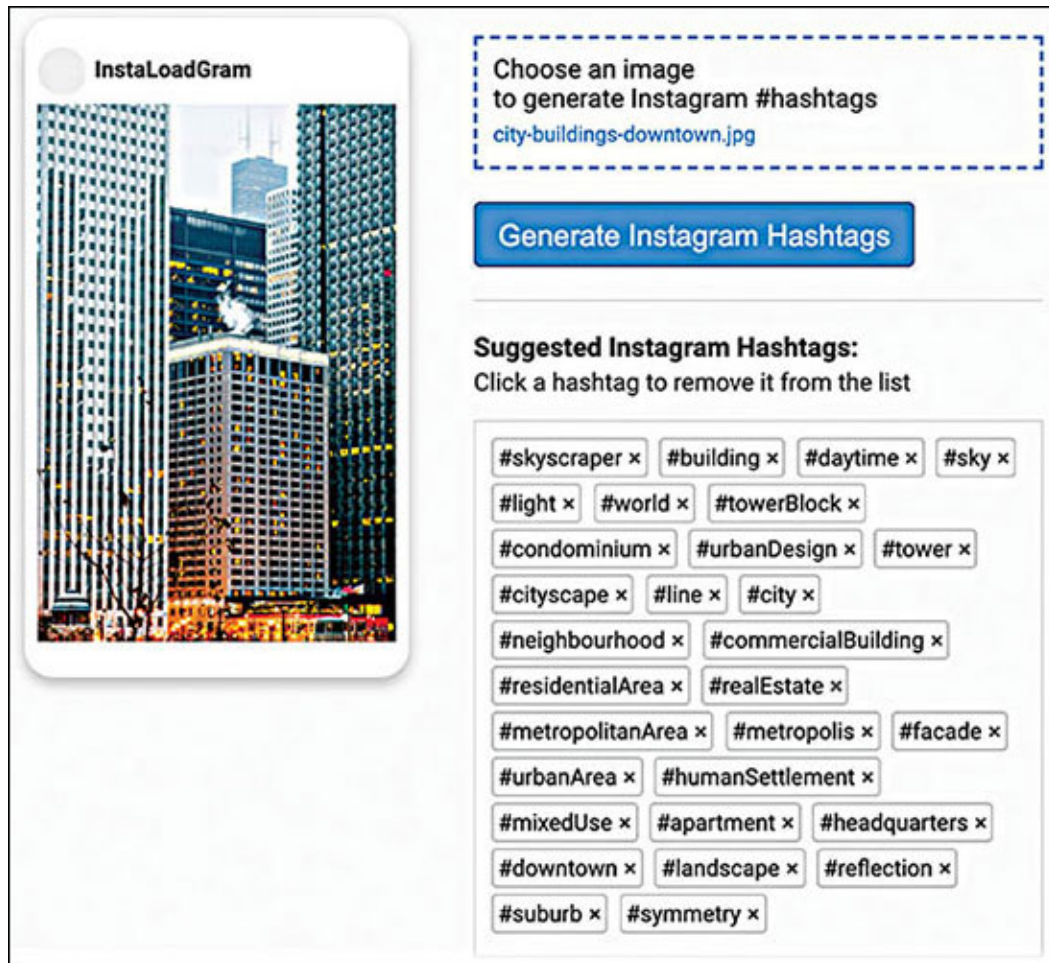
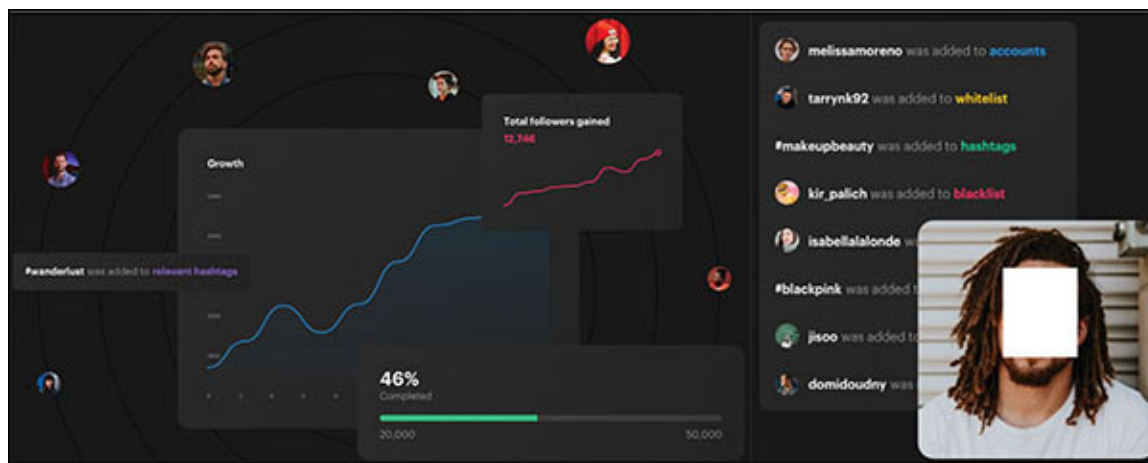


Figure 8.7: InstaLoadGram's hashtag results for an uploaded image (14)

5. Una should also leverage Instagram stories, highlights, IGTV Video live, guide and Reel features. For instance, she could use IG stories to do polls, ask questions, do a new post shout out, etc., use IG live to do live videos of her baking or give quick baking tips, guide to list her recommended products, and so on.
6. She needs to interact with other profiles too. Una should comment and like other people's posts as it is not enough to just post on hers. It has also been suggested that following profiles that complement yours or your products along with ones that can give you great ideas on bloggers and influencers can prove to be very helpful. With steps 1-5 in place, this sixth step is also where a trick to Instagram following lies. Followers are generally gained in community fashion where certain groups run campaigns for the group members, mandating that each follow everyone else in the group and interact with their posts. Following can be increased in hundreds at a time on these.

Kenji [\(15\)](#) is a handy example of a tool that can automate some of these steps (including identifying and following relevant Instagram profiles, and complement them with analytical insights on the progress made, as shown in [Figure 8.8](#):



*Figure 8.8: Results screenshot from Kenji [\(16\)](#).*

Once the following is built, Una can also opt for channels that showcase brands looking for Instagram influencers to promote their products, or use it herself at a later stage.

## [8.2.2 Twitter](#)

We talked about the aroma of Una's bakes. A great way to showcase that is through the voice of the customer. Twitter may come handy here as it can allow customers to voice their appreciation while also allowing Una to find industry influencers or potential B2B buyers. Regardless of its relevance to Una, for the purpose of this book, let us see what clicks on Twitter. To build a presence there, in any given session when Una logs in, Twitter can often work with the following set of steps:

1. Follow every relevant follower.
2. Retweet or react to at least one relevant tweet per relevant follower. Some variation in topic helps.
3. Thank all your followers for following you.
4. Add at least one original tweet not talking about your brand (resources, thoughts, facts, external weblinks, online articles, etc.) with one or more trending hashtags and/or popular industry hashtags.
5. Add at least one blog or brand-specific tweet with one or more trending hashtags and/or popular industry hashtags. Shorten the weblink using a tool like bitly.com.
6. Find, follow, and retweet at least one industry-relevant celebrity, influencer, or blogger.
7. Leverage Twitter Stories to share updates such as "*bake of the day*", special offers, etc.
8. Unfollow anyone who has not followed back for more than a month or since whenever that individual last tweeted (whichever is later) after you had followed them; provided their tweets are not something that actively interests you. Watch out for those who purposely drop off once you have followed them to ensure that your following-to-followers ratio is less than one.
9. As with Instagram, a number of steps here can be automated. Tools like Social Dog, for example, can help Una schedule tweets and get insights. These include the follower-following ratio, replies/retweets/likes, and even recommended actions, as shown in [Figure 8.9](#):

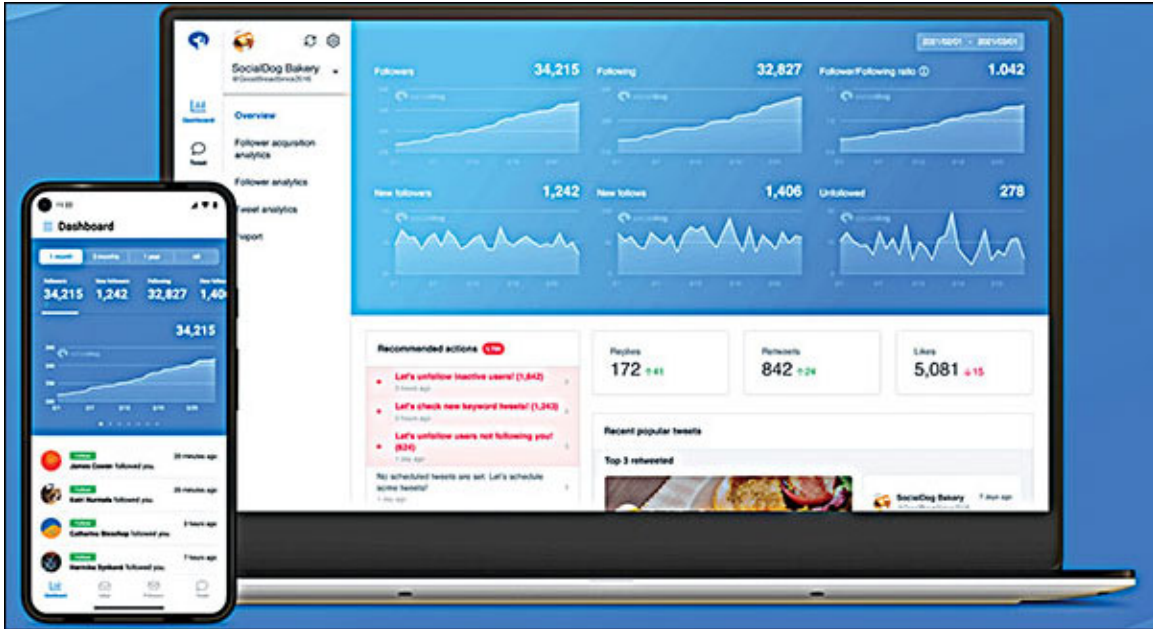


Figure 8.9: Twitter Analytics with Social Dog (17)

### 8.2.3 LinkedIn

What about LinkedIn? Una's intention to jump on LinkedIn will be very different from all other channels. It will likely be to build her business and personal brand from a more B2B perspective in order to stay connected with executives at restaurants, hotels, or media. The steps would therefore be different as well:

1. Share articles/updates/online links on Una's personal page or the company page, if available. Now, Una may not need the latter for her bakery, but could need it down the line for her business as a supplier employing multiple people.
2. Tag relevant individuals/companies/pages to the above posts.
3. If the new share is on the company page, "Like" it from the personal account to make it visible to all of Una's personal connections who are not following the company page yet.
4. Occasionally, publish an original blog. If the blog is published on Una's website, publish a preview and add a link to the post - share as per step 1.
5. Of course, similar to some of the other tools we have seen, Una can use tools to measure the performance of her content and make it more powerful. Another example is Acrolinx (18), which is built on an

advanced linguistic analytics engine specifically designed for enterprise or Una's B2B business.

6. Join related communities and groups where Una's target B2B audience hangs out.
7. Share newsletters, updates on any webinar or event that Una hosts, or any posts and blog links on the above communities. These events can be in-person local networking sessions or online sessions, but would be based on a very different pain point; not so much to teach baking to individuals but on something that will appeal to Una's business customers, say, the restaurants. This could include tips on how to keep her - or any other - breads fresher for longer, how to best plate them, or to choose the perfect accompaniment (for example, wine) to serve them with.

Note that forums or community pages are not too helpful on LinkedIn, or any channel for that matter, because of the sheer volume of posts people put in. Anything Una posts may quickly disappear from view due to other posts coming in and will only be visible to her contacts or those who were actively looking at the forum page before it disappeared.

For Una, LinkedIn is a step to engage in down the line as her business evolves. It may not be worth it to hop on it from the start. If Una can subscribe to a premium package like the LinkedIn Sales Navigator, LinkedIn also allows Una to generate lists of target profiles and message them even if there is no established connection yet. These are called InMails. A sample message would be as follows:

*Hi (Name),*

*My name is Una, I am the founder of Una's Bakery.*

*I've been looking for people to connect with from the hospitality and food/beverage industry and that's when I came across your profile. I just saw that ... (Add personalization by researching the target's achievements, blogs, etc.). Congratulations!*

*I would love to connect with you and learn from your success story/experience in the space. Maybe even introduce you to my bakery services.*

*At Una's, we are popularly known for:*

*(Add key benefits)*

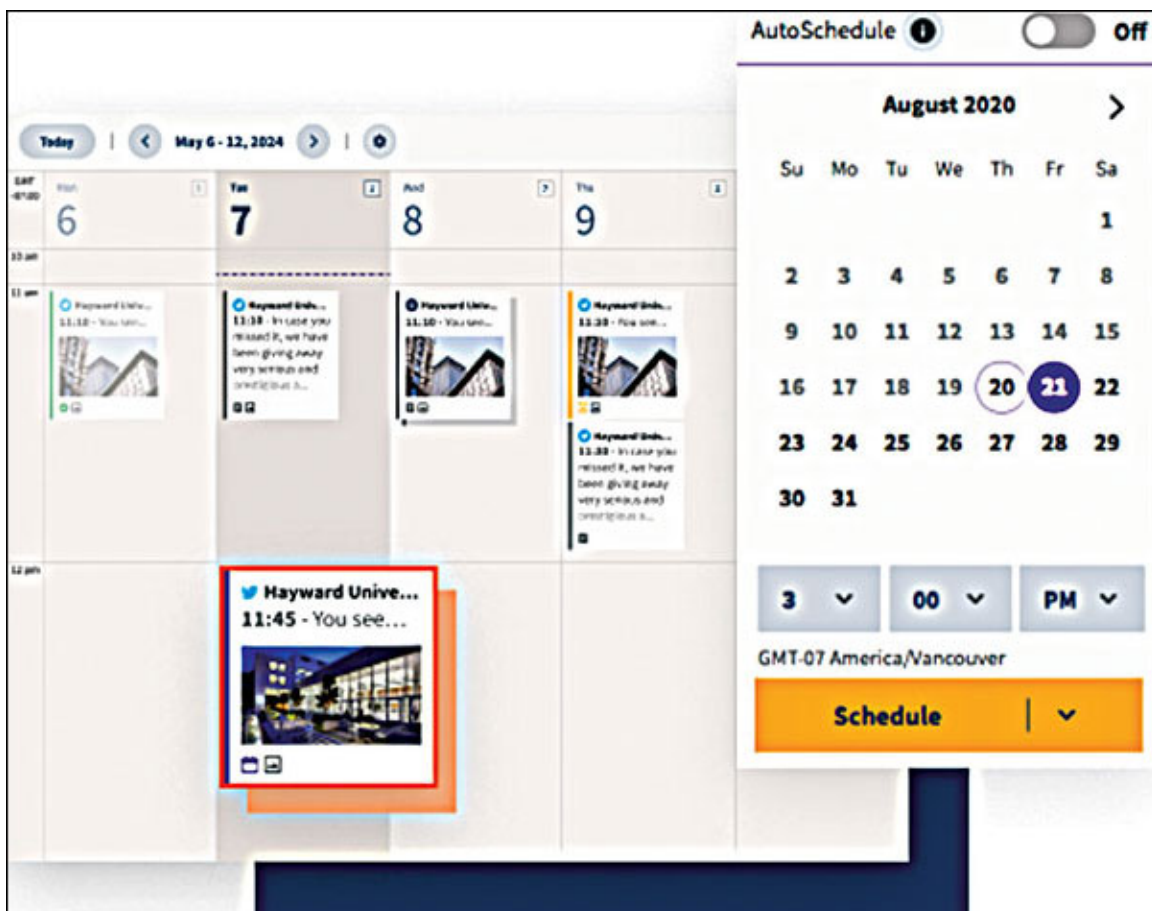
(Name), I look forward to connecting with you and hopefully a coffee chat someday soon!

Best,

Una

Una could also include a meeting link, in her message, as a CTA to allow her leads to book a call with her.

As we can see, one cannot manage all the channels from the start. And the more channels you are visible on, the more channels you are exposed to in terms of consumer perception and feedback. Automation in social media becomes crucial when managing these, and that's where tools like Hootsuite (19) become useful. It can help Una pre-upload her images (created manually or using any of the prior tools discussed), add in the captions along with hashtags (using hashtag generators, trending content or keyword searches) and schedule them for the day and time she wants them to go live on her profile, as shown in Figure 8.10. She can schedule months' worth of content for auto posting and track their performance from one easy-to-use dashboard (20):



*Figure 8.10: Scheduling posts on Hootsuite (21)*

## **8.2.4 YouTube**

Personal branding is about the value one can gain from an individual. It is often best delivered via video. Una can consider leveraging her unique proposition by teaching baking enthusiasts how to bake well. Video channels like TikTok or even image-based descriptive channels like Pinterest could work great in this case, in addition to something traditional like Facebook (which can utilize best practices for all types of content discussed so far). But to deliver best practices for video, the ideal example would be that of YouTube.

YouTube is an instant SEO darling, more so than a website for two reasons:

1. Its content is quicker to digest which means the message is delivered more quickly.
2. Unlike the website that relies on people searching for similar content, YouTube's content is automatically recommended to the target audience by the channel itself.

In fact, for a visually appealing product that involves an engaging process to create it, YouTube could be an even bigger pull for Una than Instagram or Pinterest, which are more suited to static pictures or short reels. That said, channels like TikTok, Pinterest, Snap, Facebook, and YouTube all now monetize content creators. On YouTube alone, thanks to the introduction of YouTube Shorts Fund and the existing revenue share model on YouTube Premium subscriptions, as well as YouTube BrandConnect, Super Chat, Super Thanks, and Super Stickers; there are now potentially ten different ways to earn. Others include the channel memberships, merchandise, and ticketing. (22)

Similar to other social media content, people share YouTube videos when they see value in it. It could be in terms of humor, surprise, intelligence, or something else. The content strategy on this channel can be:

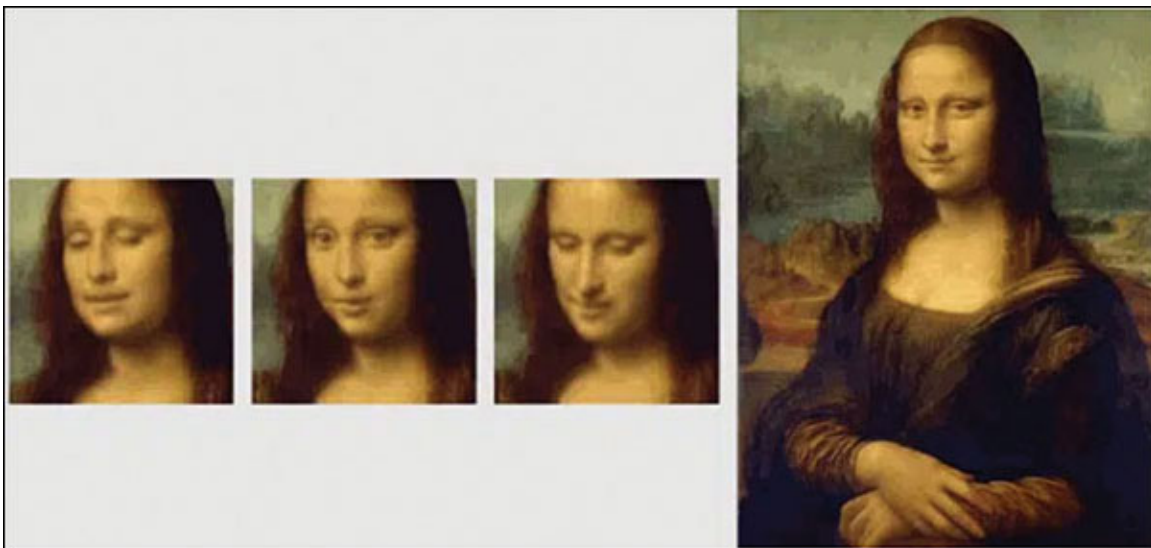
- To create a video that is helpful for the audience and delivers value in some form.
- To then invite their inputs and engage with the video or in future video creation.
- To host live events if needed.

Such collaboration normally requires an active, inciting call-to-action on part of the viewer. What Una needs here is a clear differentiation delivered by her unique take on the topic she is discussing. That is her niche, and it could very well be the personalization of breads.

YouTube or video platforms are also a subject of intense AI innovation, allowing personalization on a scale unseen before. We will look at these in more detail in the next chapter under the topic of Online and Virtual Ads.

While we have looked at a few examples of AI generating relevant written content, it is difficult to miss its most controversial stretch of this capability: generating videos. It's controversial because tools like DeepFake can generate fake video or audio content that is becoming more and more difficult to tell apart from real ones. (23).

In fact, in a complete reversal of a common practice of taking screenshots from videos, AI can now generate videos from a picture! See [Figure 8.11](#) for a snapshot of videos generated for Mona Lisa (24):



*Figure 8.11: Videos generated from Mona Lisa*

On that scale, Lumen5 (25) is much more palpable and immensely useful, as it can create videos for you from a content message by matching each scene with relevant videos, photos etc., allowing a continuous stream of engaging social media content.

Besides increasing visibility and helping us reach our customers, there are two clear ways that Una's social media presence can help in:



- They are a great way to announce and support her brand's milestones and recognitions.
- They can help run and support online advertisements.

We now look at how she can utilize these benefits.

### **8.3 Recognition marketing**

With close to four billion people around the world using it, (26), social media plays an important role in connecting your business to them. This helps in building brand awareness, credibility and engagement, and by extension, in generating leads. That being said, to succeed in social media marketing you need to figure out what social channels your target audience frequents, where your product or offering is most suited, which ones you can reliably support, and how you can make your content trend.

Now, companies have gradually mastered the intricacies of extracting and implementing such detail into their marketing strategy, leading to the recent rise of hybrid models that include both physical and digital engagements with the brand. But if social media is so popular and "*common place*", does that necessarily make it important to marketing? One fine morning early in 2021, *Bottega Veneta* answered that question vehemently when the luxury brand abruptly switched off all its social media accounts. (27). Instantly critiqued and pondered over by many in the fashion world, the public gradually realized the mastery behind this unthinkable action. A luxury brand's primary pull is its exclusivity, and a loud 24X7 accessibility on social media thwarts that. In a single stroke, the brand had therefore returned to a "*coveted, hard-to-get*" positioning loved by its wealthy target market.

Bottega Veneta's case may be an extreme one for most businesses who cannot afford to, nor need to, reject social media as a channel. As we will see later in this chapter, social media is important to leverage online advertisements. Nonetheless, it is never wise to rely on one channel. While that may enable you to focus on becoming the channel influencer, it can backfire if the channel itself fades in popularity among your target audience. But there is another route to cross-channel recognition, and that is to go after it directly.

Just like bloggers, awards and recognitions also operate in a tiered structure in terms of their effectiveness in a brand journey. There are smaller accolades you can try to get early on before moving on to the more popular ones. This approach is primarily geared towards building credibility, but let's spare a moment on this

at Una's current stage. Even if it's a local neighborhood Sunday afternoon baking prize, winning something does lend an immediate, even if perfunctory, impression of something that is at least not average. Only, there is a limit to how far little-known achievements can carry a brand. We will study these initiatives more while learning about building brand credibility. The point here is that little milestones of any kind must be announced to the larger audience and social media helps with that wonderfully.

Recognitions can also occur in less sensational but equally authentic ways. For example, Una can be recognized as an expert for her opinions and support she lends to groups. Such social channels allow Una to meet with online and offline communities and potential partners. It also allows her exposure to their gatherings and other events that Una can be a part of. Closely tied with these channels are forums (think, Quora) where she can answer questions or give expertise in her domain to others online. Every footprint of hers online can be accompanied by her blog, social handle or website link, thereby redirecting traffic to her content and increasing her web presence and SEO ranking. Such websites and groups are generally more specialized to a particular industry, and one should always fish them out to hang out in, for some time each day.

## **8.5 Conclusion**

Social media is both a boon and bane, allowing tremendous visibility and exposure to both good and bad brand engagement. Generally, content trends when it subscribes to optimal relevance, recency, and engagement levels.

Every social media channel has its own style of operating, content and behavior it favors, its own pros and cons, and success factors to maximize the ROI from ads run on it. One needs to consider the best practices for each channel and ensure it is carefully aligned with the product positioning and target audience aimed for. While certain situations may consequently render social media unnecessary, brands should strive to achieve recognition through other means (such as awards) nonetheless to build positive awareness. Social media and its ads then help create the right climate for greater recognition and recall through repeated and timely exposure.

People notice a brand not only when it generates appealing content but also when it gathers recognition. Awards and industry lists are a great way to achieve this. They also help with the next stage by establishing brand credibility and helping gather more followers. All of this sets us up for effective online ads –

the next and more evolved stage of building positive awareness, naturally designed to also solicit greater engagement and conversions.

## Questions

1. Which of the following statements are true about social media?
  - a. All social media channels utilize more or less the same approach to use them effectively.
  - b. It is not as important to be on all social media channels as to be on the relevant ones and to time the presence well.
  - c. If one social media channel generates a better following and engagement than others do, it is a clear indicator that the other channels are not being used well.
2. Which of these factors are important for a post to go viral?
  - a. Authenticity
  - b. Relevance to a topic
  - c. Good timing
  - d. Endorsement by celebrities
3. Social media posts should have a call to action that is easy, enjoyable, and rewarding in some way (whether in an emotional or tangible way) to allow clear ROI. Is this statement true or false?
4. A social media channel is primarily different from a typical search engine in deciding what to show a user in that “relevance” in the former is also decided by who posted it (i.e. an existing connection or someone unknown). Is this statement true or false?
5. Social media channels are set up during the building brand awareness stage but they also help with which of the other stages immediately upon activation:
  - a. Brand engagement
  - b. Brand credibility
  - c. Brand receptivity
  - d. All of the above

6. \_\_\_\_\_ works great for short text-based content while \_\_\_\_\_ works great for image-based content.
7. \_\_\_\_\_ is primarily designed for the B2B audience as it allows deeper work-based profiling even though the same individuals can be found on other social media channels too.
8. Which of the following are benefits that content over YouTube enjoys over that on a website?
  - a. It does not have to rely solely on someone searching for similar content.
  - b. It is quicker to generate for the creator.
  - c. It is quicker to process for a viewer.
9. Most AI tools in social media are designed to help with two tasks: \_\_\_\_\_ and \_\_\_\_\_. AI tools are helpful because they can automate and speed these up significantly.
10. Recognition marketing is primarily geared towards building \_\_\_\_\_ but can be helpful in building visibility too.

## Answers

1. B only
2. B and C  
Authenticity is crucial for posts to go viral in a positive way. Without it, a post may still go viral but runs the risk of being received negatively.
3. True
4. True
5. D
6. Twitter, Instagram
7. LinkedIn
8. A and C
9. Generate content and provide insights
10. Brand credibility

## CHAPTER 9

### Brand Awareness – Online Ads

The first two phases of brand awareness dealt with establishing Una's web presence, enhancing its visibility, and provoking audience interaction through social media. With an eye on recognitions and content type, Una can also ensure that the awareness is positive in nature. All this positions Una to pursue her targets more aggressively. That brings us to online advertising. Like social media, advertising can be a vast domain in itself, except that it also hits the organization financially as a high risk, high reward endeavor. Most organizations leverage online ads to make a sale, but it can also be used to "*boost a post*" on social media for greater visibility or invite a different form of action (like signing up to a newsletter). Let us now explore some of the fundamentals in this space.

#### Structure

In this chapter, we will discuss the following topics:

- Online advertising
  - Components of a successful online ad
- Setting up B2B and B2C online ads
  - LinkedIn ads
  - Google ads
- Virtual advertising

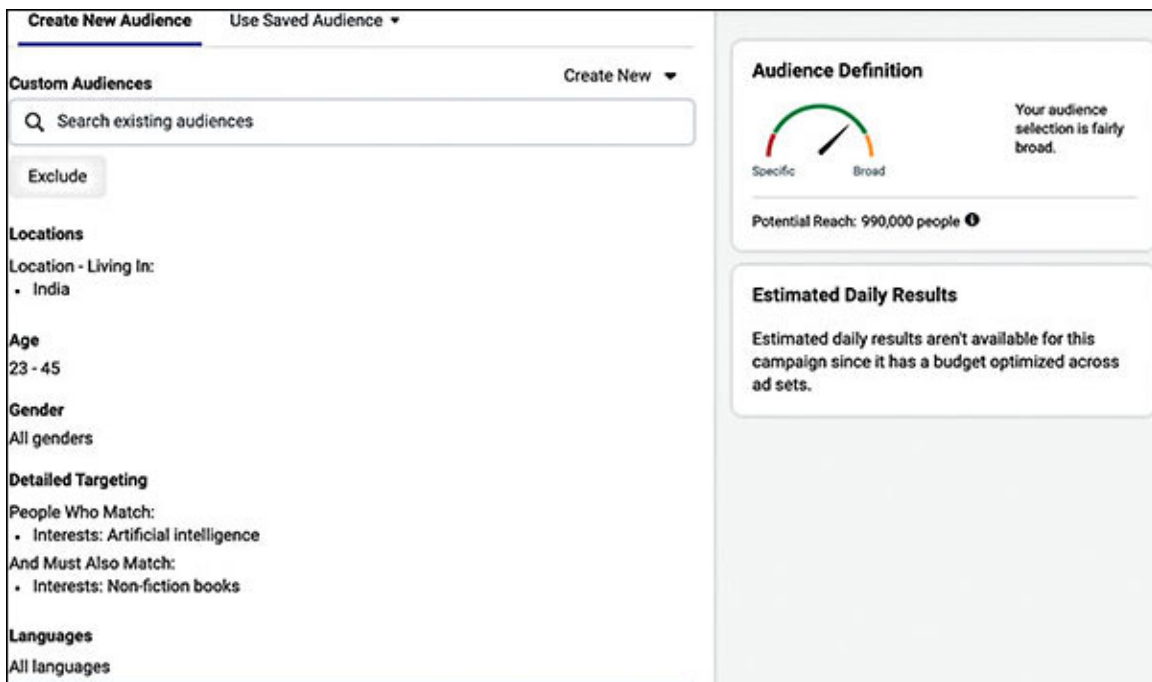
#### Objectives

By the end of this chapter, you will be able to understand the components of successful online ads on different channels and how to set them up effectively for a B2B and B2C audience. You will also gain exposure to the upcoming world of virtual advertising.

## 9.1 Online advertising

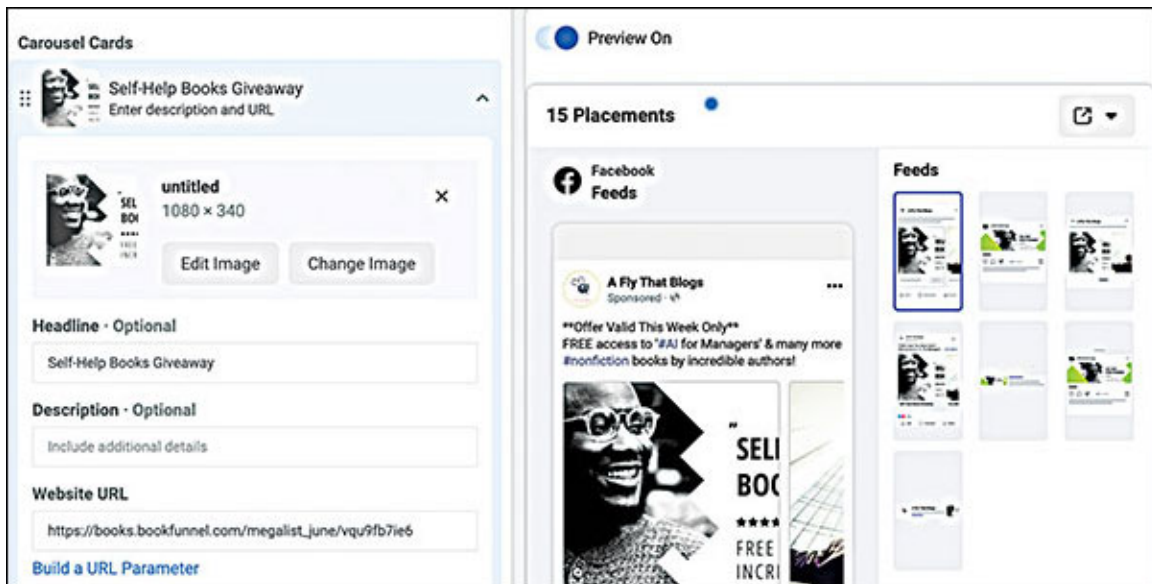
Visibility is determined by being everywhere your customers are, by actively reaching out to them, and by avoiding areas where your customers aren't. Ads bring these approaches together. They are a good idea once Una has established her content on the internet and can be executed with no major expense at first. But it is in ensuring relevance with visibility where customization makes a big difference and where online ads (and now, virtual ads) take the cake. The objective of an online ad can vary, from simply announcing something new to build more awareness or engagement, to more commonly, inducing a “conversion” or sale. As such, reaching out to prospects does bring in some element of sales with it, but the more rewarding it appears for the customer, the better.

Online ads are mostly delivered on Google or on a particular social media channel, though vertical aggregators or ecommerce sites like Amazon generally allow dedicated ads on their channel too. Each channel works differently in terms of the budget it requires and the level of customization it allows. For example, Facebook Ad Manager's (1) level of targeting is among the most comprehensive. Few of the many factors are shown in the example in [Figure 9.1](#), along with a simultaneous estimation of the resultant target audience size on the right-hand side:



*Figure 9.1: Audience definition on Facebook Ads Manager*

AI also lets us create multiple versions of an ad, allowing the system to dynamically determine the version most resonating with a given target audience. Multiple ads can also be set up to allow a scrollable view. The content options include the main image, a headline and description, although the Ad objective or destination weblink should remain the same as shown in [Figure 9.2](#):



*Figure 9.2: Carousel cards on Facebook ads*

### **9.1.1 Components of a successful online ad**

Depending on the objective, Facebook's ads may not necessarily be as effective as, say, those on YouTube which is based on Google AdWords. The setup here is more advanced and you have to trust Google's algorithms to identify the right audience from a vast open pool of those targeted. That can take time before you start to see responses, given its contextual, searcher intent-based algorithms. Nonetheless, Google does allow leverage on its many assets, such as a robust location-based targeting, thanks to its Maps feature. But if the target audience is known to a brand, the consequent targeting can be achieved even more strongly by LinkedIn ads by comparison, as they can perfectly reach a certain group of professional audience if, say, the target were determined by roles or industries. Having said that, they can also be more expensive.

Setting up ads requires a clear, short message, along with the image or video you'd like to show. Ads can also be of different types, ranging from simple text-based ads that appear on a search page to video-based display ads that play before or during YouTube videos, to interstitials or banner ads that show up on

websites. The budget you set should always start out small. In the case of Una, this is primarily because neither she nor the AI knows who is most likely to react to her ads at this stage. Una would not want to spend too much of her precious dollars on this experimentation as it is a time-bound learning curve. She can always increase the budget once the response rate improves, and she gets sales. This budget, though, does affect her bidding ability which determines whether her ad will show up top of the page or somewhere else. It is difficult to outbid the bigger players in the industry, which is another reason to be careful with throwing too much into the pot upfront. Choosing the right keywords helps to an extent. Google and a few other websites can show which keywords related to Una's business are being most frequently searched for, and what the competition levels are among the advertisers for those keywords. The right keywords (ideally, the most popular but with least competition) can inform the words Una uses in her other online content too.

Some key elements for Una to keep in mind while setting these ads are:

- Clear audience definition.
- Creating visual appeal through her ads.
  - Always bear in mind that an average person's attention span is lower than that of a goldfish. So, the more relevant, creative and appealing your ad is, the more it is likely to catch attention.
- A clear call-to-action (CTA).
- Planning realistic budgets that will achieve her goal.
- Having all her necessary integrations in place.
  - For example, Una can utilize Google Analytics and insights tags connected to her website. Another option for her is to use a Facebook Pixel, which is a small code that she can add to her website to track the performance of Facebook ads. This code can also be added to weblinks or other pages, providing greater insight into an ad's performance.
- A set of researched keywords that will help her pop up in front of her target audience.

Remember, you can always choose to bid on competitor brand names and keywords to pop up on when people look for them. Just like with other promotions, though, not all ads are geared towards generating sales. Some may



simply invite people to follow Una's baking channel on YouTube or take other such action. That may in fact be a prudent choice early on as it can help build a sufficient pool of followers to view Una's posts, which will also help her later with credibility. At the end of the day, while there are many parameters that can help measure an ad's impact depending on its objective, they are broadly split across the following three classes:

1. **Cost-related:** This includes **cost-per-click (CPC)** or cost-per-1000 impressions (read: views) (CPM). The lower these costs are the better.
2. **Performance-related:** It is generally measured by parameters such as the **click-through-rate (CTR)**, **Recall lift** (that is, the number of additional people who may remember seeing the ad within two days), or **% of people who skipped an ad**.
3. **Impact-related:** It refers to measuring how well the ad achieved its objective. For example, you can measure the conversion rate (or purchases as a direct result of someone seeing an ad) if Google Ads is integrated with your purchase and payment portal.

The objective with such measures is to build a continuous stream of real-time data from different sources that can together paint a clearer picture of what is going on in Una's online (and even offline) world. Here is a sample of how robust that can be:

- The online ads can help Una know how many people are viewing her ads, how many out of those are clicking on it to visit her website, and how much it is costing her.
- A tool like Google Analytics can then track behaviors on her website to show how many overall are visiting her website and where they are coming from, how much time they are spending on the website, how are they moving from one page to the other, how many are eventually going to her social channels, and how many are moving on to make a purchase or find a way to contact her.
- Una's social channels can reveal how many followers she has and how engaging her content is in terms of interaction.
- Her payment system and her accounting books, meanwhile, can show how many customers purchased her product or contacted her in a given period. It can help Una correlate her website behavior and ad performance to financial outcomes.

- Tools like Facebook pixel on the payment end can track and reveal the profile of buyers, allowing Una to link different website and purchase behaviors with the profiles to identify the ideal buyer group.

## **9.2 Setting up B2B and B2C online ads**

Dabur is a brand synonymous in India with traditional health and beauty solutions built on the promise of Ayurveda - the ancient field of medicine rooted in the Indian subcontinent. Its example showcases the use of online ads effectively. In a nutshell, Dabur's technique took its target customer through the entire frontend of a brand journey leading up to the purchase decision.

An article [\(2\)](#), published by one of Google India's managers detailed how Dabur broke its traditional advertisement videos on one of its hair care products into snippets that each catered to a particular objective along the brand journey and were selectively shown to a targeted viewer based on her interaction with the previous ad snippet. For instance, those who viewed the first ad without skipping it were then shown more detailed ads covering the usage and persuasive testimonials from celebrities. Those who skipped the ad instead were shown one on the product's benefits next. As a result, Dabur experienced a 2x Ad recall lift while 45% of the viewers did not skip the content. That's in contrast to 65% of people who normally skip video ads, according to an older CNBC article. [\(3\)](#)

The Dabur example relies on identifying an initial specific target and narrowing it down accurately based on the intent shown by those in this group. These are both factors that are unachievable at scale without AI. The good bit is that most of the hard work is done by the channels themselves. A creator only needs to provide some details on the audience and appropriate content to feed it.

Let us first look at how to set up such ads on two channels – LinkedIn and Google – that serve as classic examples of B2B and B2C advertising (though are not exclusively limited to these groups), respectively. We will conclude by looking at a few third-party innovations in the ad space that are likely to become mainstream very quickly.

### **9.2.1 LinkedIn ads**

With the bakery's LinkedIn presence set up, Una now has access to what is one of the stronger channels to advertise on for a more professional audience (example, owners of a restaurant, restaurant managers, and other professionals

in the food and restaurant/hotel industry). A Hootsuite blog post by *Katie Sehl* notes, “not only are LinkedIn members influential, they also have two times the buying power of the average web crowd.”<sup>(4)</sup>.

Let’s say Una is looking to connect with all the hotels, restaurants, and bed & breakfast owners and/or managers in her city. Her aim here is to:

- Increase her brand recognition and recall.
- Invite them to a webinar she is hosting on best practices for storing baked goods.
- Provide an additional nudge to those who interacted with her brand online but took no action.

It will typically take the following process:

1. Una will need to first source her leads. A more traditional approach could be where she uses LinkedIn’s search filters and finds all her target contacts. Alternatively, she could use the Sales Navigator tool to speed up this process. By setting a few planned filters, this tool can source large lists of leads that match her preferences and/or look-alikes. These filters include career, work (seniority, function etc.), industry, location, or even technographics details (that is, the kind of technology being used in the company). [Figure 9.3](#) shows a sample results view:

The screenshot shows the LinkedIn Sales Navigator interface. At the top, it says 'Lead lists' and 'Last updated Feb 6, 2019'. There are several filter categories: '99 Total results', '10 Changed jobs in past 90 days', '2 Mentioned in the news in past 30 days', '46 Posted on LinkedIn in past 30 days', and '46 Share experiences with you'. Below the filters, there is a table with columns: Name, Account, Geography, Notes, Outreach activity, and Date added. The table contains three rows of lead data.

Name	Account	Geography	Notes	Outreach activity	Date added
[Profile icon]	+ Add Account	Toronto, Ontario, Canada	Add note	2 years ago ✓ Message sent	2/6/2019
[Profile icon]	Afiniti.com	Greater Toronto Area, Canada	Add note	2 years ago ✓ Message sent	2/6/2019
[Profile icon]	airSlate Left account. Edit Account	San Francisco Bay Area	Add note	3 weeks ago ✓ Message sent	2/6/2019

*Figure 9.3: A sample view of LinkedIn Sales Navigator filters*

The tool will keep Una updated with all content and actions related to contacts in this list to help her determine an opportune time to engage. As

discussed earlier, Una can consider sending connection requests and timely InMails out to individuals in this list.

2. Una can now move to pushing out a few sponsored posts to these targeted leads using the Lead list targeting ad campaign. By uploading a list with details of her leads, such as lead name, company name, email address, etc., she can make her choice of ad pop up in the news feed of those leads. Una can leverage this campaign to promote her blogs, articles, services, etc. so that her leads subconsciously register her name and/or brand in their minds, therefore increasing recognition. Consequently, when they receive her message, it will trigger a recall – possibly increasing the action on her message and thereby increasing her chances for booked meetings.
3. While sponsored messaging is good for website visits, lead generation, and website conversion, Una can move beyond sponsored posts to leverage one of several other ad forms that LinkedIn offers to get an engagement, such as webinar registrations. These include traditional single image ads, carousel ads containing swipeable cards, text ads, display ads, and dynamic ads that personalize based on the viewer’s profile. Moreover, such engagement ads also carry an option for the viewer to follow Una’s company (the page the ad is posted from), thereby increasing her LinkedIn follower count. (5) To help drive registrations for her webinar, Una can use LinkedIn’s lead generation form. This form pre-fills itself based on your target audience’s LinkedIn profile, making it a one click sign up for her audience as well as building her sales funnel up with most ease! These forms can also be added to sponsored posts and InMails (another possible CTA for Una’s InMail message).

Let’s say Una were to notice that while her website visits are high, her conversions aren’t. She feels her audience may need an additional nudge or reminder about her brand and its services. To accomplish this goal, Una can set up retargeting ads. By adding a LinkedIn insights tag to her website, Una can target her ads on LinkedIn to those who visited her website. And if Una uses a CRM like, say, HubSpot integrations for ad management, she can instead set up a HubSpot insight tag to her website and create her retargeting ads through the CRM’s ad manager directly. This way, Una can run multiple ads on various channels (LinkedIn, Google, Facebook, etc.) but manage them from one place!

[Figure 9.4](#) shows a sample view of a LinkedIn Ad Manager dashboard:

Campaign Group Name	Status	Spent	Impressions	Clicks	Average CTR	Bid	Average
1 selected campaign group	-	\$177.70	14,066	161	1.14%	-	\$12.63
Default Campaign Group CID: 610306644	Active Running	\$177.70	14,066	161	1.14%	-	\$12.63

Figure 9.4: A sample LinkedIn Ads result view

## 9.2.2 Google AdWords

The strength of Google AdWords (6) lies in how many different channels and situations it can cover for an advertiser. Through Google search and display ads, Una can make her ads pop up on her lead's Gmail accounts, Google searches (when they use any of her targeted keywords or phrases), on YouTube, etc. In the future, should Una decide to build an app for her business, she can leverage Google App ads to drive downloads while building awareness about her brand. In fact, Una can also use her LinkedIn leads list with Google Ads by simply uploading the list to her Google Ad campaign to target her display ads to them.

Let's say Una is now looking to connect with individual buyers in her city. Her aim here is to:

- Increase her brand recognition and recall.
- Persuade prospects to try out her bakery as it's not possible for Una to personally persuade each prospective customer.
- Provide an additional nudge to those who interacted with her brand online but took no action.

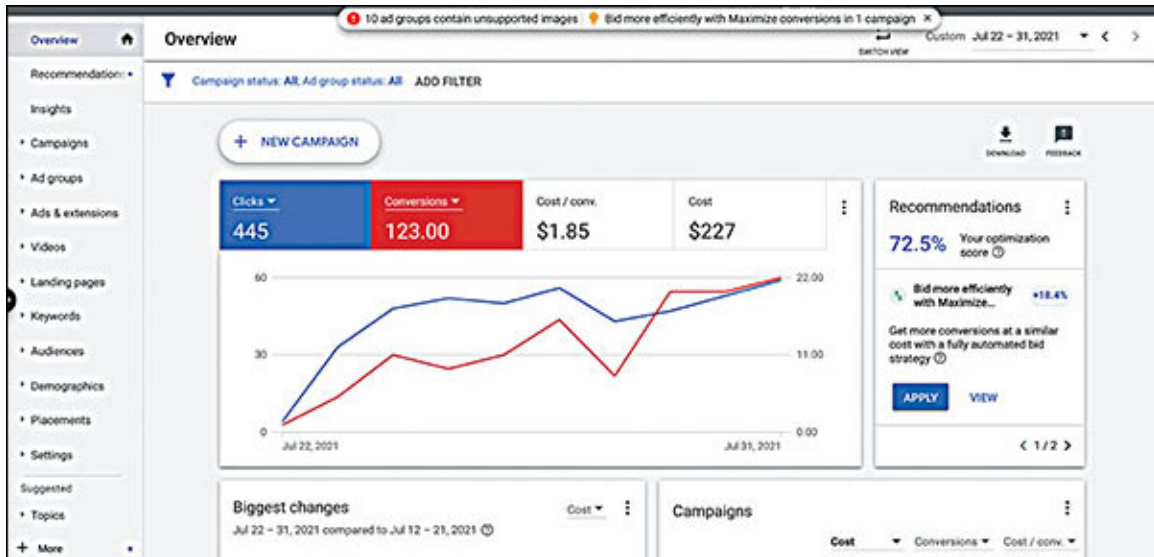
For B2C advertising, targeting can be trickier as there is generally no clean list of buyers as in B2B. Tapping individual buyers requires greater AI-enablement. It will typically take the following process:

1. Google Ads on YouTube allows targeting to Advanced Audiences (7) where Una can feed in detailed demographics, affinities (such as groups or

behaviors exhibited by the target customer), life events, topics, and even those considering similar products.

2. To use Dabur-like sequential targeting to display future ads based on the success of previous ads, Una can create a suite of ads using Director Mix. The key is to create a set of effective content that is both relevant and pleasing (especially with a hook in the beginning). Effectiveness is important because Google uses TrueView in-stream ads [\(8\)](#) which can be skipped after the first five seconds. If a viewer skips them without engagement within the first 30 seconds (or the duration of the video if it is less than 30 seconds long), Una will not be charged. There are other options too, such as the unskippable 6-second Bumper ads or the 15-20 second ads [\(9\)](#), or even Virtual Reality video [\(10\)](#). Regardless of her video content, it should be natural and genuine; include moments of engagement; appeal with the emotional, functional and descriptive modifiers; and have a clear call-to-action.
3. A crucial piece to leverage Google AdWords fully is through its connectivity with Google Analytics which already has visibility to Una's website. We have already seen the Analytics and Tag Manager views in the previous chapter. These allow her to choose and track more specific audiences based on, say, the page they visit on her website or the type of interaction they have. Specifically, it helps even more with retargeting where Una may want to target those who have seen her ads previously or engaged with her brand online but left the website without making a purchase.

Retargeting campaigns can be run on Google ads in parallel to her LinkedIn ad. It will help her cover a wider audience base. Using the audience definitions tool on her Google Analytics, Una can set up groups such as "*New website visitors*", "*Returning visitors*", "*Product page visitors*", and so on and leverage these definitions while setting up her Google AdWords target audience. This way, coupled with a strategic keywords plan, her ad will appear in front of those sets of audiences, helping her increase her conversion rates while improving her targeting. [Figure 9.5](#) shows a sample results view:



*Figure 9.5: A sample results view on Google AdWords*

Another crucial item that has to be considered in online ads is bidding or optimizing it to ensure adequate investment with maximum ROI. Using a set of high frequency predictive algorithms tools like Acquisio Turing ([11](#)), can help Una scale her search engine marketing efficiently and intelligently, and fast track A/B testing and optimizing her campaigns with bid and budget management. This is useful and important because winning bids change throughout the day depending on traffic and demand. And AI's ability to discover patterns and learn allows such tools to improve their understanding of what the most optimal bid in a campaign is.

Albert ([12](#)), is another great example of a self-learning digital marketing AI assistant that uses predictive analytics, machine learning, NLP, and other proprietary algorithms that can help Una and her team analyze, manage, and optimize their paid ad campaigns, be it on Google Ads, social media or any other paid search, social and programmatic accounts.

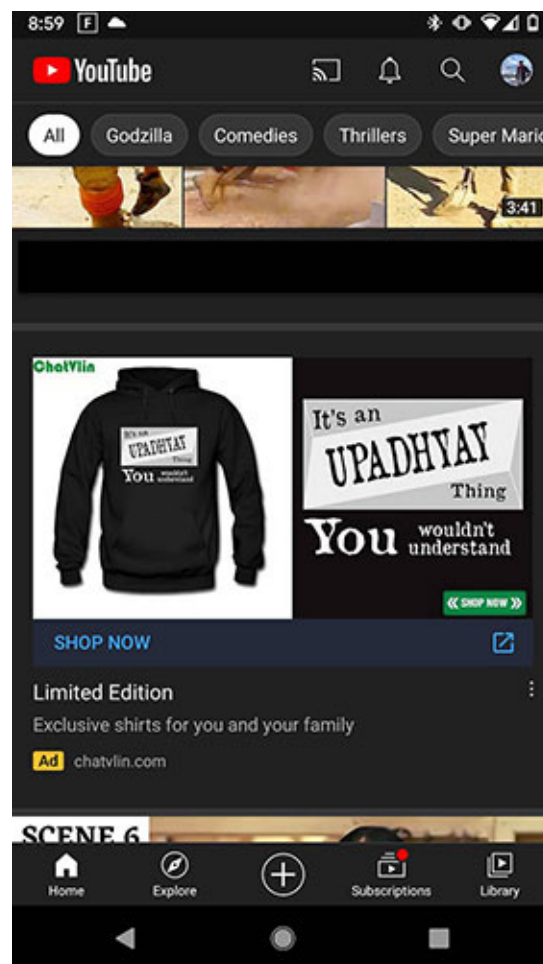
**AI tools are needed today to achieve three objectives: creating relevant content, increasing efficiency, and providing relevant insights.** In all cases, AI can help automate and speed up the process significantly to help a business meet the constantly engaging demands of social networks. With all this data starting to come in, Una has now reached a stage where she has to lend some attention to her operational process in order to leverage all her hard work to push customers along the brand journey. More importantly, with all the software she can potentially use, she might find herself submerged in a stack of bit-part tools by the time she is through with the stage of brand awareness alone. And

that brings us to one of the most important issues to consider, which is stack fatigue.

We cannot use AI tools for every little thing, no matter how effective they are. Otherwise, we can soon find ourselves inundated and overwhelmed by a lot of software poorly used or managed, and that reduces our efficiency instead of doing the opposite. That is also why it becomes crucial to think about the operational process in place to support a growing business. That will be our discussion in the next chapter.

### 9.3 Virtual advertising

The examples we have seen so far allow the host channels to run their own online ads. But new age tools are popping up to allow more innovative advertising on traditional channels. Consider the ad in [Figure 9.6](#) that popped up on my screen one day while I was surfing videos on YouTube:



*Figure 9.6: A Sample Personalized Ad on YouTube*



Chatvlin specializes in personalized shirts. In their ad seen above, they had managed to display a sample image of one of their tees personalized with the surname ‘Upadhyay’! One would expect the click rate of such an ad to be significantly higher (no thanks to the use of **Limited Edition** to create a sense of exclusivity, which we will come back to later in the book). Such ads certainly catch attention.

Not all custom ads need to be personalized to this extent to be effective, though. Consider now the following example in [Figure 9.7](#) of perimeter board ads in a soccer match that showed different ads to different viewers:



*Figure 9.7: A Sample Virtual Ad by Supponor Ltd. (13).*

This is the advent of custom virtual advertising that allows advertisers to run multiple relevant ads, localized to the viewer watching the game on TV. The above example is taken from *Supponor Ltd*. Viewers feel they are watching the ad as being displayed on side screens at the ground.

This feat is achieved thanks to the ability of a mounted camera to read positioning and alignment in the ongoing game. It is supported by a software that can direct the computer to where it should put images relative to everything else showing on a camera. All surrounding areas on which the ads are not wanted are masked off. It is the same technology that allows statistics/scores to appear on TV in certain ways at specific locations of an ongoing game. Other companies doing this include Statcast3D, Zero Density, and Broadcast Virtual.

This technique has some obvious benefits:

- **Greater revenue:** Organizers can now sell the same ad slot (both space and timing) to different advertisers, instead of having to run limited ads in fixed slots.
- **Greater relevance:** The ads are run as per the local tastes. So, a fan watching a Premier League game in Russia will be exposed to an ad for a Russian product, in Russian language, instead of watching a local English brand's ad in English.
- **Greater clarity:** The ads will no longer be subject to poor visibility due to telecast or ground conditions, as they are being displayed virtually (vs. on-ground) in excellent clarity.
- **Greater intelligence:** Virtual advertising allows advertisers to better gather viewing data to assess an ad's impact to allow better real-time customization of ads to display.

## 9.4 Conclusion

Online ads are helpful not only to build awareness but also to facilitate engagement and allow automation of a brand journey for a prospective customer with sequential exposure and retargeting, depending on which stage the prospect appears to be in.

The measure of an online ad's performance is generally cost, performance and impact related. But all good ads are a matter of certain basic components, which include clear targeting, catchy visuals and headline, clear CTA, relevant keywords, and optimized bidding.

Given the revenues at stake, the online advertisement space has matured significantly, enabling precise targeting based on the intent of the viewer, thereby increasing the effectiveness of ads as long as the content is relevant and the tools are utilized properly. That is why the use of AI has become a necessity to operate these channels effectively.

Modern technologies are even enabling virtual advertising which can superimpose custom ads on the same area of a broadcasted physical location, allowing more revenue per square inch for the host, better clarity and targeting for the advertisers and more intelligence for both.

With large swathes of AI tools Una can already use at this nascent stage of her brand journey, keeping her AI enablement under control and her journey sustainable before she gets distracted with incoming customers is her immediate

priority. Let us now switch gears to some internal organizational modernization that Una must undertake to set herself up for success.

## Questions

1. Few of the factors that make for a great ad include:
  - a. Clear CTA
  - b. Catchy text and visuals
  - c. Accurate targeting
  - d. All of the above
2. \_\_\_\_\_ and \_\_\_\_\_ are two types of parameters that serve as good indicators of whether an ad is performing well.
3. An online ad can help build awareness, invite interaction or a non-sale action from the viewer or directly lead to a sale. Is this statement true or false?
4. Given a bidding system for online ads, the optimal approach is to bid as high as possible. Is this statement true or false?
5. To fully utilize the power of AI to maximize ROI on advertisements, it is advised that an organization buy or build a reinforcement learning-based tool which can dynamically decide which ads to show an individual to maximize responsiveness. Is this statement true or false?
6. Google AdWords can display third-party ads on Una's website, thereby generating revenue from her visitors. Is this statement true or false?
7. Google Analytics and \_\_\_\_\_ can help enhance the ability to more accurately define and track conversions from an online ad.
8. Tools like Facebook pixel on the payment end can track and reveal the profile of buyers. Is this statement true or false?
9. The fundamental components and dashboard to set up, track and manage online ads for the advertiser are generally similar across all channels. Is this statement true or false?
10. \_\_\_\_\_ can help hosts gain more revenue per square inch of physical space while helping advertisers achieve greater ROI with better targeting and clarity.

## Answers

1. D
2. Cost-per-click and Click-through-rate
3. True
4. False
5. Making the highest possible bid is almost certain to reduce the ad's ROI by limiting the duration for which an ad can be shown before it becomes prohibitively expensive and wasting resources before the organization has had a chance to deduce timing, audience and other factors that lead to an ad being effective.
6. False
7. Like with any technology, the possibilities of AI enablement may be endless but not all are equally rewarding for everyone. The costs to procure or build advanced AI tools may be too prohibitive and not worth the objective a business may be looking for from its ads. As we will see in the next section, a balanced and prudent choice of technologies to help with marketing is key to their success.
8. False
9. This is achieved by Google AdSense.
10. Google Tag Manager
11. True
12. True
13. Virtual advertising

# SECTION 3

## Winning the Customers

An intent to buy starts to form after a potential buyer is positively aware and impressed by a brand enough to consider it. Bringing her to the goal line requires her to trust the brand enough to engage with it in a way that reinforces her trust in the value the brand offers. Externally, these are the brand credibility and engagement stages. The latter also involves active selling. Internally, it first involves preparing for the customers. Picture it to be something like ensuring that the staff know their roles and are ready with welcome drinks before the doors are opened and guests start to arrive. In this section, we will cover all of these elements to help Una win the customers; now that she has their attention.

In this section, we will learn the following topics:

- How to automate processes within the brand journey to create an effective and efficient workflow.
- How to increase the credibility of your brand.
- How to enable channels and engage your target audience with your brand.
- Explore various selling strategies that can help close the deal, particularly with business customers.

The chapters included are:

- [Chapter 10: Operational Alignment and Automation](#)
- [Chapter 11: Brand Credibility](#)
- [Chapter 12: Brand Engagement](#)
- [Chapter 13: Selling Strategies](#)

# CHAPTER 10

## Operational Alignment and Automation

The brand operations team is like the operations team at a manufacturing plant, tasked with making sure that all the machinery (in this case, the technology stack) is working properly and in sync, all processes are being followed by the personnel using it, and the results are as expected. In this chapter, we see how to automate functions to allow our teams to sustain the deluge of information, initiatives, and customers as the business grows.

### Structure

In this chapter, we will discuss the following topics:

- Why is operational alignment critical?
- Core elements of operational automation
  - Central system
  - Software customizations
  - Insights reporting
  - Advanced/supporting tech
  - Stack planning
  - Performance marketing
  - Avoiding tech misuse
    - Reversing high spam ratings

### Objectives

This chapter deals with the crucial requirement of establishing a robust operational infrastructure and process to support any marketing, sales, or customer success activity. By the end of this chapter, you will be able to

understand the core elements of automation and how operational alignment can help increase your sales, marketing, and customer success team's productivity. You will also learn how to track your team's performance, avoid stack fatigue and plan tech use better, generate useful insights in an easy-to-understand way, and avoid tech misuse.

## **10.1 Why is operational alignment critical?**

A pharmaceutical company that we worked with showed us an interesting example of how steps to modernization can go awry. The Canadian arm of a global giant; this client had a very traditional and industry-specific way of selling. This was particularly due to the nature of its customers – physicians – and the way they generally procure medicinal products to recommend to their patients. Sellers contacted the physicians, organized events to engage them, visited in person, offered free samples, and followed up to close a sale. When the national team decided to make the process more systemic, they opted for one of the more popular CRM software in the market for sales teams. They wanted to ensure the data is organized well to enable the team to use advanced analytics and AI in the future. There was one problem though: this particular CRM instance, while meant for B2B sales, was not meant for the healthcare industry.

It was quickly apparent that most elements of the CRM were not of much use to the client, given that physicians generally did not even belong to a fixed company or “account”. They often moved from one clinic to another, and a clinic did not operate like a company one could sell to. Due to the sales team's need to log product samples, expenses incurred, and specific events held by the company, the CRM had to be massively customized to suit the kind of data the team needed to log. That was a massive added cost. The sellers were not the most tech-savvy, which further complicated the adoption of the product. And the bill of sales on every closed deal was on paper, which was simply being photographed and uploaded on the system. As a result, information on closed deals remained unavailable except in randomly named pictures taken from phones. The data would never be apt for use by AI. And despite a second round of widespread customization, the CRM was eventually discarded in favor of a lesser-known system designed specifically for pharmaceutical sales. Somewhere towards the end, the software vendor

themselves declared that the product was simply unfit for the purposes this company was looking for.

Lack of a fit between what was needed and offered, lack of a careful plan and accountability to implement it, and lack of readiness on part of the users together ensured that the investment was lost without ample returns. A team does not need the best software in the market but one that is best fit for its requirement. The team also has to buy into the purpose of the software and set accountabilities that ensure its proper use and execution. And the team has to use the software it brings home. You will be surprised at how often that last requirement falls flat either because users do not see the value to change the way they have traditionally done things, cannot catch up quickly enough, or find the new way prohibitive.

Besides the brand journey itself, the process to support it is the next big thing that companies often deprioritize until they are more evolved. Going back to the formulation of the brand identity, there were several unknowns to begin with that would require Una to tweak her target audience or positioning as more data became available. Data starts to come in once Una has set up the infrastructure to generate and capture it. She is now exposed to audience reaction which can reliably inform her strategies, provided she manages to capture and assess them well. The same holds true for her channel partnerships or active selling where she will need to manage the engagement cycles. Moreover, as Una's business grows, she will also need more tools to manage the business and support its growth. Regardless of the tools, she will need operational procedures in place to manage the customer's journey, particularly the business customers who would expect a more organized partner experience. This often-ignored operational piece forms the crux of marketing and sales functions in companies today.

The biggest pain point facing most companies nowadays is the fact they are not ready to use AI and get all its benefits of cost reduction, efficiency improvements, or increased revenues. And it's primarily because none of them spent the time needed to organize their systems and data in the early stages. With huge volumes of data accumulating over the years, and different systems now in place to operate, making any change is excessively costly. Most companies do not know where to begin. Going back to our CRM example to cite a common occurrence in larger enterprises, most have different teams using their own instance of a CRM software (or even multiple



CRM software), neither connected to each other. So, the combined data is effectively unusable as it is incoherent. And it is quite impractical to expect every team to purchase their own AI software to use with their CRM (and its limited data), thereby further complicating the technological footprint across the company. What's worse, the leadership cannot get cross-organizational insights unless a data scientist manually brings the diverse data together and generates them. Recall [Chapter 4: AI & the Future of Marketing](#) in [Section 1: Understanding the Brand Journey](#). On that scale, without such advanced analytics, imagine how far back in time the organizations still are in terms of the effectiveness of their marketing, sales, and service functions.

As we mentioned before, an operational alignment also becomes important for process control, given the abundance of tools available in the brand awareness stage alone. With more potentially coming their way, marketing, sales, and customer success operations have the following three fundamental objectives:

- Apply best practices and set procedures to the activities in these functions
- Measure and keep track of their performance and effectiveness
- Manage the technology stack in place to support these functions

The activities referred here involve every step of the brand journey we have so far discussed and will discuss. The job of operations is to make sure everything is running right and in a timely manner, all processes are being followed, data is being entered, and the results are easily viewable to ensure that the execution of marketing, sales, and customer success plans are effective. The reliance of these activities on new tools and technologies, and the sheer volume of tasks being managed has made the operations team key to the success of customer acquisition and retention today. In fact, in an age of AI-enabled automation of most tasks, these disciplines can be effectively run by those in operations. Simply knowing how to use some of the key technologies involved can set you on a promising career path, which should indicate one of the shifts in jobs taking place.

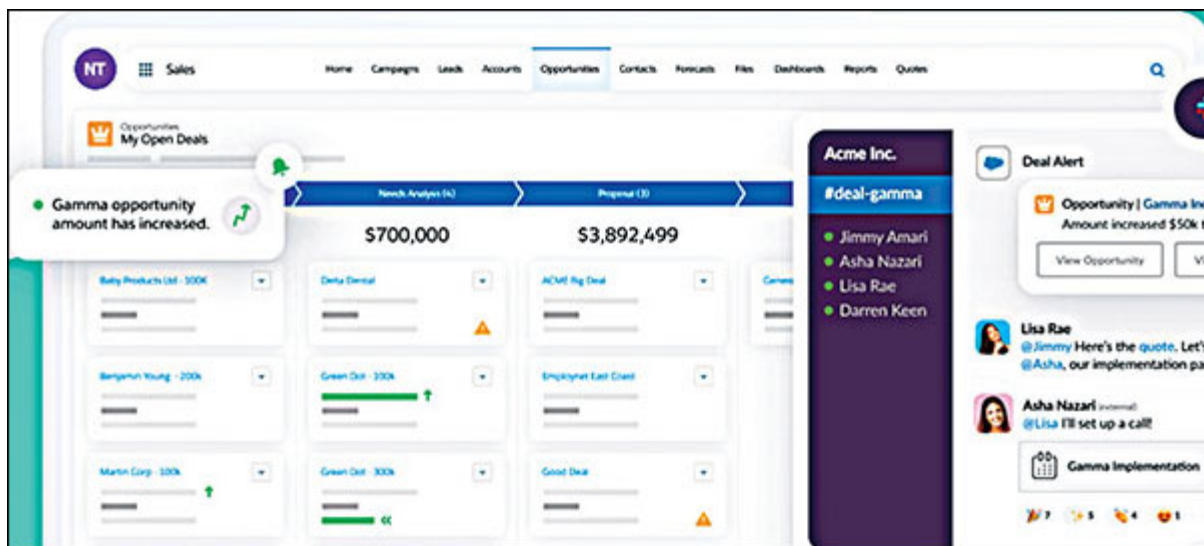
## **10.2 Core elements of operational automation**

To help you make sense of the vast field of operational automation, let us look at the core elements involved:

- Central system
- Software customizations
- Insights reporting
- Advanced/supporting tech
- Stack planning
- Performance measurement
- Avoiding tech misuse

## 10.2.1 Central system

A central software that forms the base of any technology stack is the central database – usually a **Customer Relationship Management system (CRM)**. Common examples would be Salesforce, Netsuite, Microsoft Dynamics or Hubspot, to name a few. While some CRM companies are specialists by industry or function, the bigger ones generally have different versions of their CRM for different functions. [Figure 10.1](#) shows a sample Salesforce sales CRM view with Slack integration on the right:



*Figure 10.1: Salesforce Sales CRM UI (1)*

If you notice the top menu bar, each aspect of a sales cycle has a dedicated “object” to store the corresponding information. And they are all

interconnected. So, information on a “*lead*” can be moved to a “*contact*”, connected to the “*account*” hosting her organizational information. The “*opportunity*” can have information on the particular sales cycle with that account. And all such information can be viewed in custom “*reports*” or in a graphical manner on “*dashboards*”. Users can also create new custom objects, in addition to any connected app showing in the menu as well.

The CRM is the primary repository of all data and knowledge in the organization on the customer-facing side. Therefore, all other software, including those we have looked at so far, are generally designed to integrate with a CRM and use its data. Think about this ecosystem as similar to your phone that runs on a central operating system and can house many apps which you can purchase from its marketplace to do different things. The Salesforce ecosystem is so big and supports so many apps that the company has churned out the term “*The Salesforce Economy*”. Sure enough, the CRM has spawned entire career paths, with certifications offered to those who know how to set it up and operate it. That task alone can be so big that we even have companies that focus solely on setting up and supporting the CRM usage by its customers. Its marketplace houses many apps, each of which are companies ranging from startups to global enterprises. When we bring all this together, the Salesforce ecosystem is single-handedly responsible for hundreds of thousands of jobs.

In the first section, we discussed the issue of data unavailability as one of the main impediments to AI usage and insights gathering. While organizing data storage and processing is one (and the biggest) part of the corrective process, companies also have to guard themselves against potential loss of data. Privacy laws in the European Union and Canada are particularly to take note of. For example, in Canada, companies may have to delete all data belonging to an individual if he or she requests it. (2) Una has to ensure the following three things in parallel here:

- First, that her data gathering, and corresponding actions are legal and do not breach a person’s privacy, comfort, or sense of security.
- Second, that her generation of insights is quick and real-time, to avoid a missed opportunity if data has to be deleted or becomes outdated.
- Third, that her data is organized cleanly and properly enough to allow a hassle-free deletion when requested.

## 10.2.2 Software customization

Continuing with the example of a CRM, as mentioned earlier, it can be set up to support the data specifically for the marketing, sales, service, finance, or other teams. It is because each function houses different types of data and utilizes that data differently. For example, a finance team may have no use for an infrastructure set up to map the organization's sales cycles. Any software should be set up to carry the information needed in that function and work as per the requirements and processes of that function. For instance, a sales CRM will carry fields corresponding to the type of information Una is collecting on her prospective and current customers. This will include the questions she asks in her sales calls.

That said, the different tools should generally always be connected and ensured that they follow certain standards. This is because one tool generally informs and adds context to make sense of information in another. After all, there are always common points that connect functions. For example, the size of the deal on the sales side shows up as gross revenue on the financial side, while a customer on the sales side is marked as a lead on the marketing side. So, marketing can supply data on a lead to sales to pursue it. Sales, in turn, can advise marketing on what types of leads are turning into customers so that marketing can better focus on channels that are more effective.

Having looked at Salesforce, let's pick up a different CRM: HubSpot (3). With features such as personalized workflows, automated email sequences, email campaigns, and ability to manage and track multiple social media channels, Una can automate much of her communications with inbound leads. For example, she can automate the next steps to ensure timely actions are taken with a user based on certain behaviors, as shown in [Figure 10.2](#):

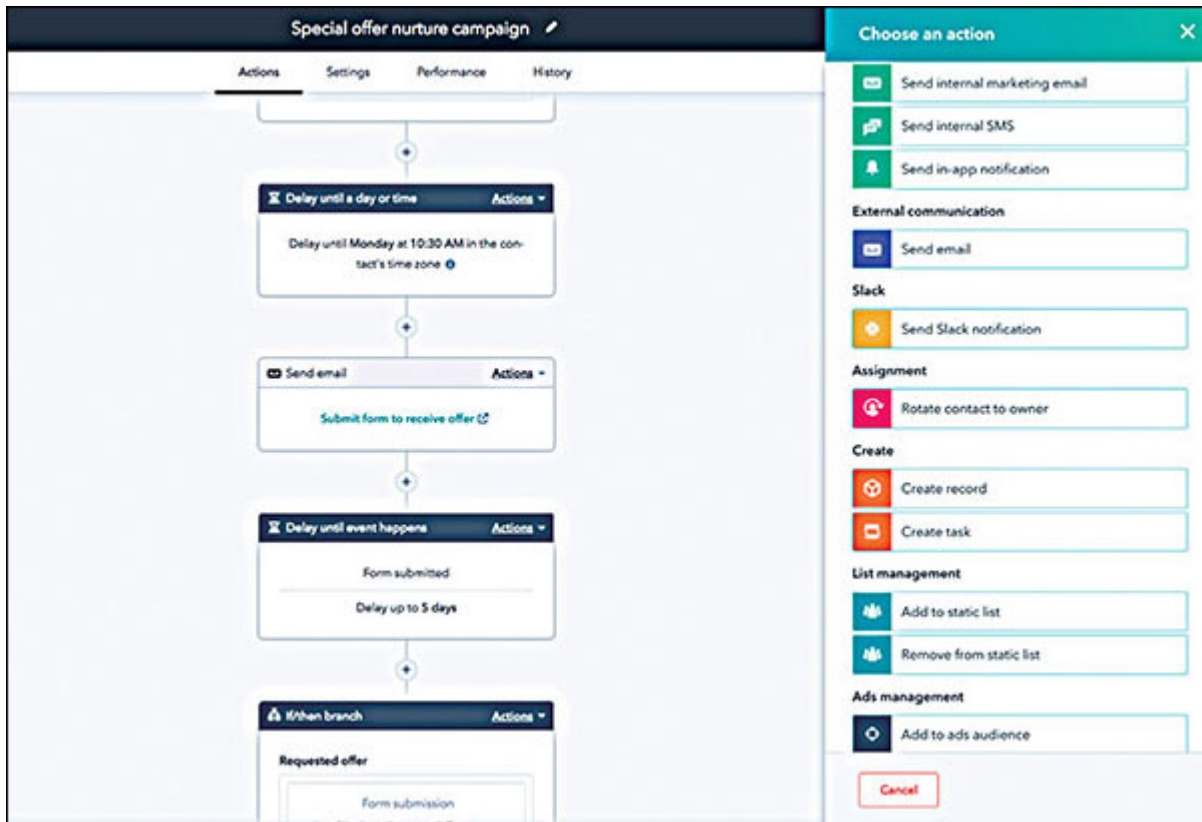


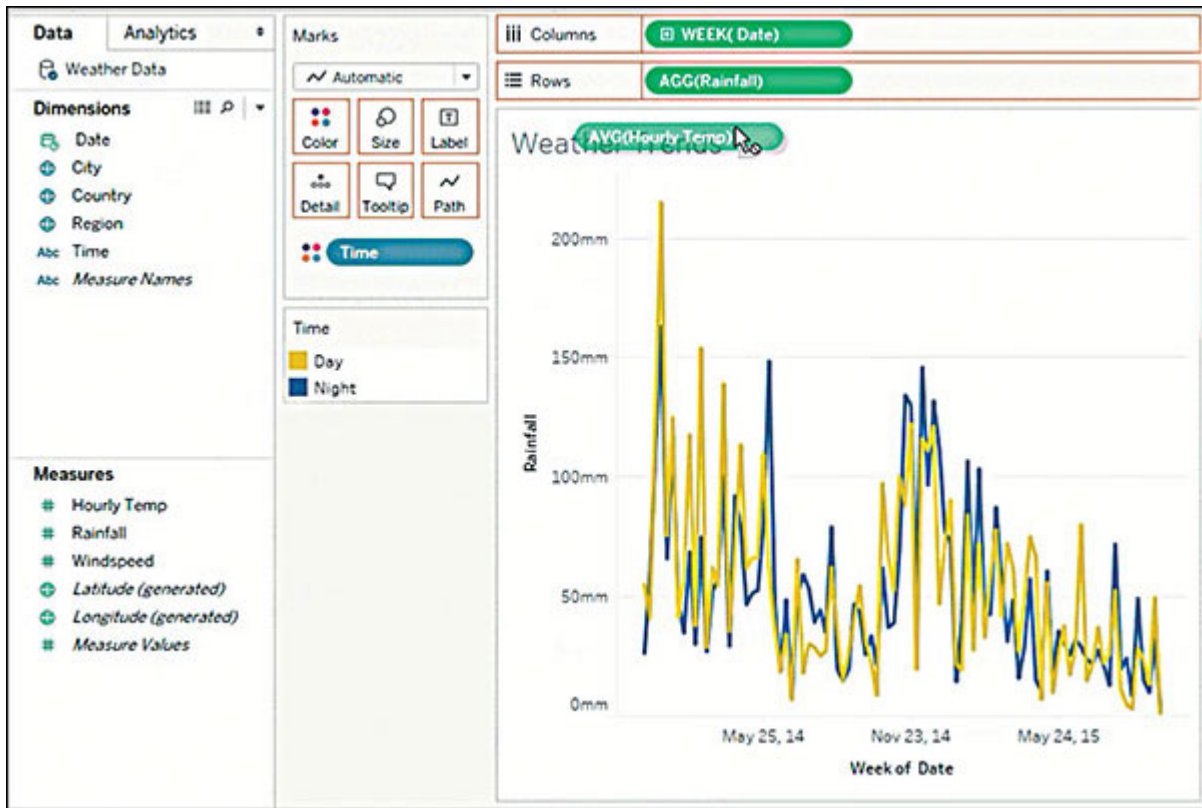
Figure 10.2: HubSpot workflow creation (4)

### 10.2.3 Insights reporting

The setup of different fields of data in a CRM is done in a way that enables easy reporting. At the end of the day, Una should be able to generate the crux of captured information on an easy-to-understand interface. For example, the number of new restaurant leads generated this week that are qualified, the number of qualified lead opportunities in the three nearest neighborhoods, or opportunities that are close to being won, should all be easily visible on simple graphs.

**Business Intelligence**, or **BI** as it is referred to, deals with such reporting and visualization of a lot of data in an easy-to-understand manner. Again, most major CRMs have their own BI capability, but these can be static or limited. More specialized options would include the likes of PowerBI, Qlik, or Tableau (now acquired by Salesforce). Once these have access to the organizational data, custom graphs can be generated simply by dragging and dropping the different parameters. [Figure 10.3](#) shows a sample Tableau

dashboard in action with “*hourly temperature*” data being dragged into the graph:



*Figure 10.3: Tableau dashboard in action (5).*

BI dashboards, when properly used, can often be as powerful as any AI tool for added insights. This is because a lot of useful information simply sits unexplored in the existing data. Looking at the available information in a more holistic manner can often prove enough to take actions. If there are consistencies found in historical events, extrapolating it can also help organizations predict what’s going to happen in the future. Indeed, it’s only after an organization has exhausted all previously unknown insights hidden in its data that advanced AI capabilities may be needed to uncover more insights.

While BI can help with internal data, other tools can help visualize external data. For instance, [Figure 10.4](#) shows a Linkfluence Radarly view summarizing social media posts related to specific topics in sports or fashion across all channels by volume, sentiment, and emotion! Its geolocation capabilities can also help understand how to appeal to people from different regions.



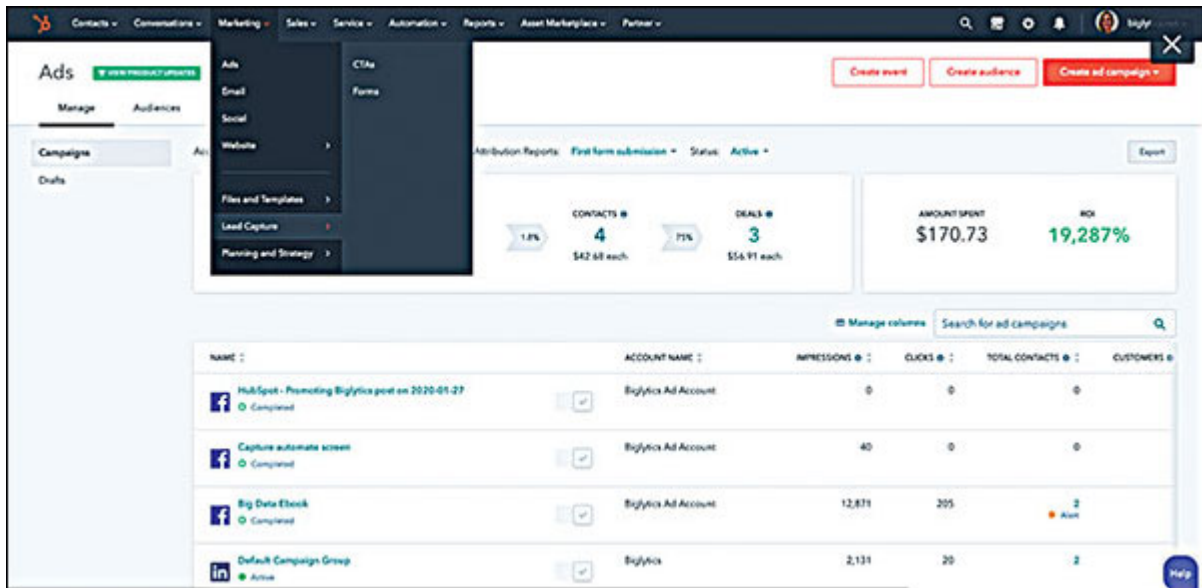


Figure 10.5: HubSpot content management (7)

Suppose Una plugs an instant AI chatbot on her website to take in queries and direct visitors to the appropriate information. The knowledge this chatbot would accumulate over time on Una’s website visitors could be a priceless addition to her active sales cycles. With an integrated CRM, the chatbot could populate all information on the database clearly linked to each individual’s profile. For example, a restaurant manager will most certainly visit Una’s website to learn more about her business before buying from her. His activity there can lend valuable insight into what he is looking for, to help Una in her sales cycle. All of it will lend ingredients that can be used by other tools as the brand journey evolves. That is why software like HubSpot also offer chatbot functionality.

Conga (8) is another handy tool that helps link CRM and **ERP (Enterprise Resource Planning)** software and automates the time-taking manual processes like pricing, quoting, contract lifecycle management, order management, and billing. That is of immense value in managing the business’s customer experience once a sale is made, but we will discuss this in the last section.

## 10.2.5 Stack planning

The use of technology is not something to shy away from. It enables us to conduct our business and gain competitive advantage in ways that were not



possible earlier. There is a massive array of specialized tools out there to deal with just about any problem in any specific business condition. There are tools out there to help us with matching personalities, tracking behavior, executing influencer marketing or referral marketing, managing multiple social media channels from a central hub, generating and scoring leads, predicting the odds of sales deals closing, and hundreds of others looking at every minutia of the customer journey.

Purchasing technology for every little new need can quickly lead to a lot of software in the house. Each software has to be managed carefully if it has to yield accurate and sustained results. Consequently, a lot of software can often see businesses spend more time managing the technology rather than managing the business. It can be disorienting, and most software may also sit unutilized. That is stack fatigue.

Stack fatigue happens almost the same way we end up with too many apps on our phone. Some are needed on an ongoing basis, some are only temporarily important, and some others we can do without entirely. Every once in a while, a new software may come into the market that outdates another two. It does not mean we keep jumping from one piece to another – that is another cause of fatigue. Software setup, its adoption to use it well, and its ongoing management take time. Adoption rate alone is something most companies struggle to increase among their employees. Data entry into the system, after all, can be a very drab affair. And having to learn a new technology amidst all the other responsibilities an employee is carrying is another repulsive to-do.

To learn more about how to understand, deploy, and get returns out of modern tech and AI software that you will invariably need while managing any aspect of the customer journey, we invite you to read *Artificial Intelligence for Managers* in the AI Management series, also published by BPB Publications.

The objective of technology is to automate as much of the pedestrian workload as is feasible. It allows the team to focus on actual execution of strategies informed by insights, rather than spending hours finding those insights. There are plenty of marketing automation software that can integrate with Una's website as well as her CRM to track website leads, add them to mailing lists, and update all that information on the database. They can then also send emails to those lists based on the segmentation Una does and score

the leads on the basis of their engagement levels, to signal a promising prospect to Una. The truly intelligent ones can even assess the responses to determine the tonality and factor it into their scoring. Some of the CRMs such as the ones discussed earlier, in fact, offer all this functionality in-house which allows for a one-stop shop for users and drastically reduces stack fatigue.

Of course, all this can make the CRM itself too complicated to use and manage, which is why CRM adoptions tend to be quite low in most companies. Spiro, on a “mission to kill CRM”, (9) is focusing on ‘proactive relationship management’ where it analyses a team’s communication (emails) or external sources like LinkedIn to extract customer data and auto-populate it on CRM, as shown in the cluster of views in [Figure 10.6](#). It can even answer questions about the customer from the data on the CRM.

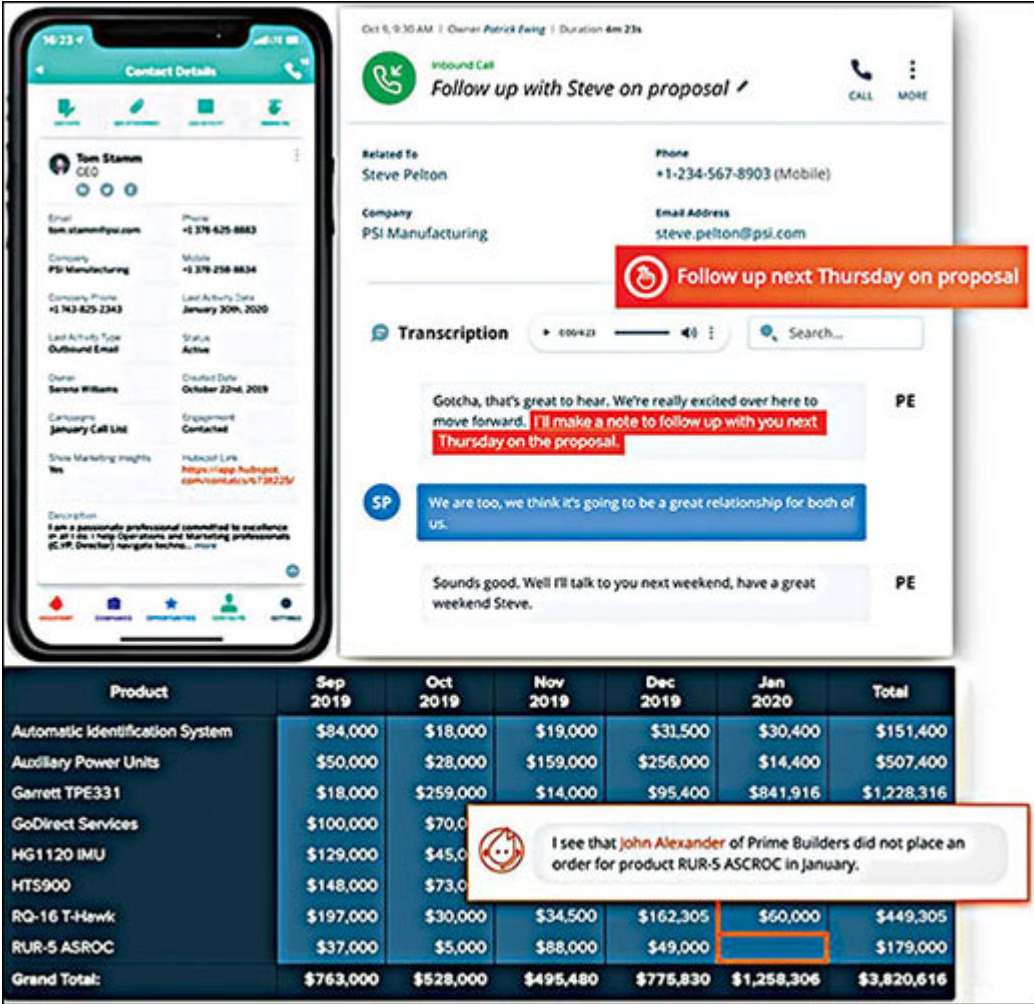


Figure 10.6: Spiro in action (10).

The bottom line with operational automation is this:

- Always be curious and run a quick online search on Google or vertical aggregators to be in the know of software options out there, as few may be the perfect fit for your particular pressing business problem.
- Before you buy though, make sure it is the right fit for you, given your requirements, limitations, business conditions, and processes in place.
- Given the rate of technology evolution, grasping these, becoming tech-savvy, and automating your business will always be a gradual learning curve, which is okay.

## **10.2.6 Performance measurement**

Performance Marketing is a term often used to depict focus on marketing driven by analytical evidence and results. It is most significantly used in affiliate marketing, which we will discuss later in this section. Nonetheless, internally, the overall marketing, sales or customer success effectiveness as well as the effectiveness of technologies used therein must be measured properly. This is where the reports mentioned earlier come in handy.

Every organization sets certain metrics or **key performance indicators (KPIs)** to continuously track. For example:

- When it comes to email campaigns on the marketing side, the open rate (percentage of recipients who opened the email) and click rate (percentage who clicked on links within the email, thereby actively engaging with the email content) are base measures. As a thumb rule, good emails can see open rates close to 20% and click rates close to 4%, but there is no strict rule around this; it largely varies with industry.
- On the sales side, the sales volume (number of deals being pursued) and velocity (rate of converting those deals) both make a difference.
- On the customer success side, the satisfaction rate, our product usage rate, and the churn rate are key.

Every business can set its own KPIs to measure another scope for some degree of creativity. With time, the KPIs invariably increase in number. While those new measures may be important, it often distracts the company

from core KPIs that best summarize the growth of business, often summarized with a framework called Objectives and Key Results (OKRs). It is Una's job to make sure she never loses the big picture, no matter how detailed and deep she goes into tracking the performance in every iota of her business.

To address part of the complexity, there are tools today that can assess on-the-go, taking some of the measurement off Una's plate. For example, Brainshark (11) can analyze videos to show how effective a salesperson is at selling, as shown in Figure 10.7:

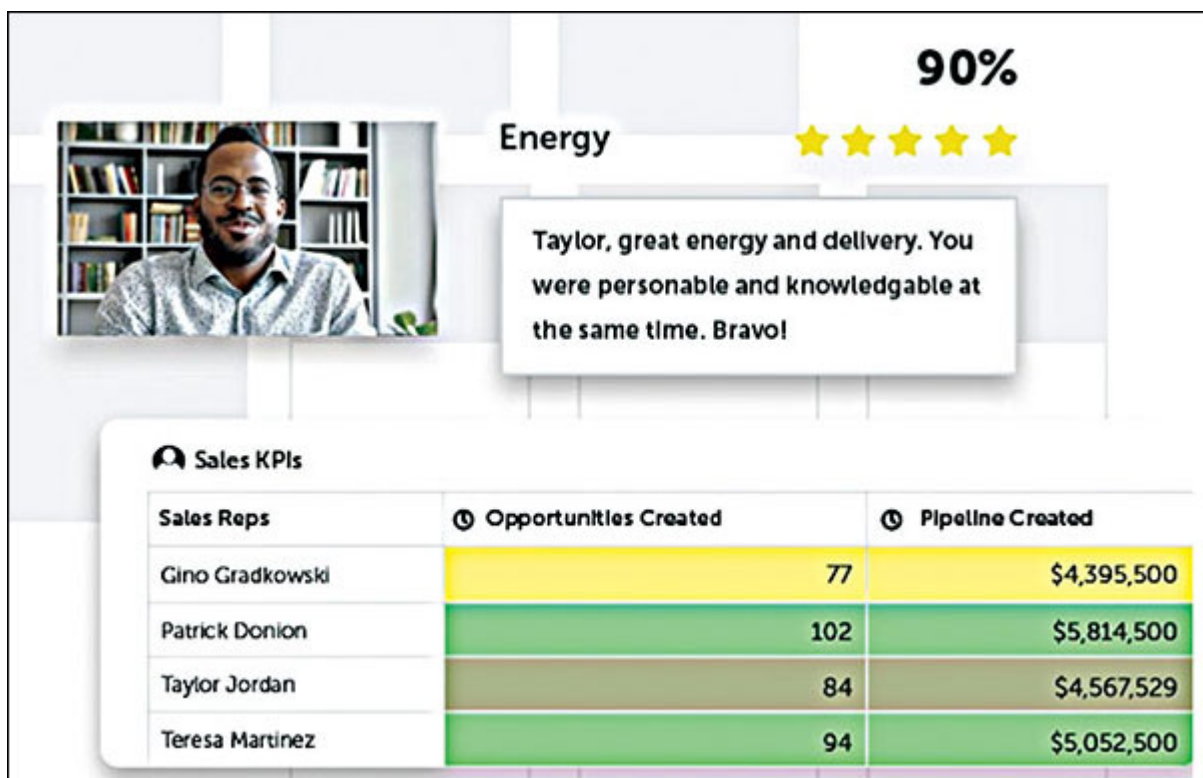


Figure 10.7: Brainshark's feedback to a sales rep (12)

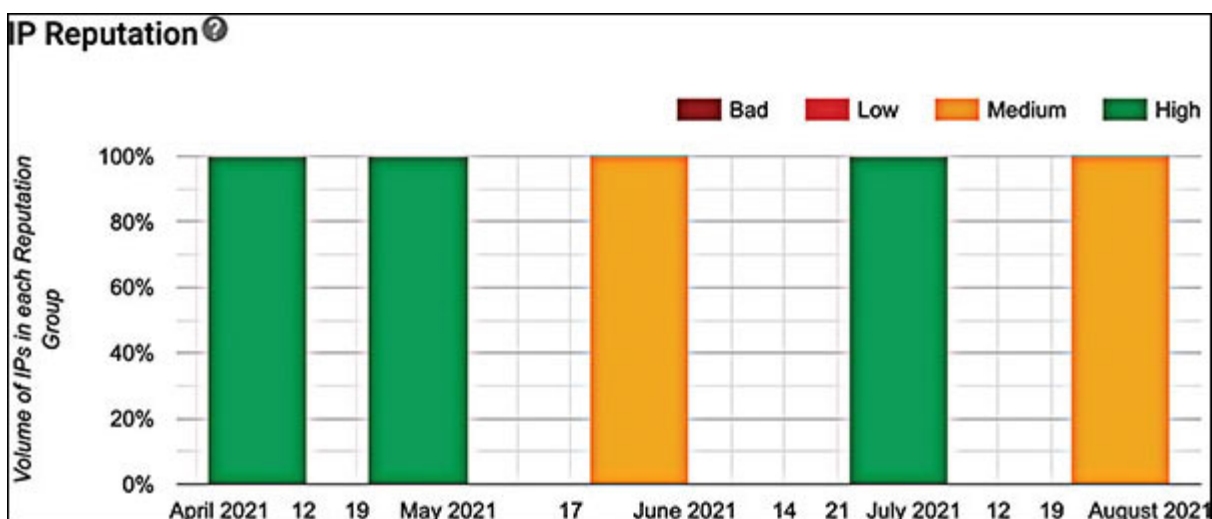
Chorus.ai (13) does something similar and can store and analyze phone calls, while Cien (14) (as shown in Figure 10.8) can assess sales performance by the reps' product knowledge, work ethic or activity management:



Figure 10.8: Cien's assessment of an account executive (15).

## 10.2.7 Avoiding tech misuse

Video monitoring in real time can be a sensitive thing, given privacy concerns. Marketing operations also have to ensure that every tool is being used properly. That includes staying within legal, ethical, and strategic bounds. For example, the team has to ensure that the company's online reputation is high. This refers both to the people and the bots. On one hand, if Una does not respond to negative online reviews or adverse media coverage in a timely manner, her brand credibility may reduce in the eyes of other people. On the other hand, Una also has to manage this credibility in the eyes of other bots, particularly the "spiders" from search engines crawling the web. This refers to the domain and IP reputation (ranging from Bad to High, as shown in [Figure 10.9](#)) and is primarily hit when a website or domain is considered unauthentic. A classic way to ruin this reputation is by spamming people with tons of unsolicited emails:



*Figure 10.9: A sample history of IP Reputation for a company*

While staying active and visible online is important, people don't like it when it becomes intrusive. The same holds true for both too frequent emails and too frequent social media posts. For instance, contrary to the perception that brands need to remain constantly visible, people tend to turn off notifications from individuals or companies that are posting every half hour, if it floods their social media pages. And we most certainly unsubscribe emails that come in every day, with the exception of one or two that strongly meet our interest.

Common types of tech misuse include privacy breach, data mismanagement, and spamming. It is no surprise that these directly relate to the customer. We have already discussed data issues and why it needs to be properly sourced, managed, and used. The former connects closely with privacy considerations, as any customer-related information that is "personal" in nature cannot be collected without the explicit consent of the customer. Laws are strictest on this front today with GDPR or CASL being some examples hailing from the EU and Canada, respectively. Marketers find themselves as the primary focus in case of any data breach.

Privacy protection and data management are crucial but relatively straightforward, given that there are clear directions on how to manage them, even though they may be tasking. Spamming, however, is a different beast.

We must always strive to avoid spamming and to keep that rating low. Few, however, understand how to get out of a bad spam rating once you find yourself in that ditch. So, for a change, how about we look at what Una can do if she inadvertently finds herself in that zone!

### **10.2.7.1 Reversing high spam ratings**

Lowering one's spam ratings and increasing the domain reputation constitutes both tech and behavioral corrections. Here are some of the steps that Una can take:

1. The first step is to pause the emails while the clean-up is underway.
2. The next step is to add or ensure proper authentications to her domain. These are SPF, DKIM, and DMARC, which basically act as gatekeepers to check whether the email source:

- is authenticated and validated to not be spam
- is sent from a legitimate server with a valid signature
- is permitted in the network

Each is basically one line of code that Una can add in the DNS (Domain Name System) settings of her domain name. Every time you purchase a new domain (say, [www.YoursDeliciously.com](http://www.YoursDeliciously.com) from GoDaddy), you will have an option to add details related to that domain. This also includes the domain owner's name and contact details, which they can choose to hide from public viewing.

3. The third step brings us back to our emails, where we must ensure that every recipient email who marked us as spam or unsubscribed, or to whom the emails bounced, is marked as such in the email list. The active email list should only carry those who willingly consented or have not denied consent to receive Una's emails. (The specific case depends on the respective country's laws). Marketing automation tools allow this level of visibility and action. More importantly, Una should now segment her contact list as applicable to ensure people do not receive emails they don't want. For instance, the contact who came in from her baking class may not be interested in the same content as the restaurant manager doing business with Una. Irrelevance is a big reason people unsubscribe or mark emails as spam.

Once Una is ready to start sending out emails again, here are a few pointers that she can keep in mind:

- Keep the frequency of emails lower going forward than the one that pushed us into the spam zone.
- Change the "From" name to one that recipients will recognize, and keep it consistent with the email address. For instance, imagine if we subscribed to emails from Una after attending one of her classes. Would we expect to receive emails from 'Una' or from 'Yours Deliciously' if her bakery is still relatively unknown? The reverse could also be true. This is why Una must ensure consistency in the brand name and identity she sticks with. Given that we may have subscribed to these emails from a while ago, chances are that we'll remember one name better over multiple.

- Add a clear disclaimer to the email stating in one line why the recipient is receiving her email, or how he or she made it to the emailing list.
- Add a clear “**Unsubscribe**” button to allow recipients to easily unsubscribe if they wish to. Also, make sure that the process is as simple as clicking on that button. At best, you may ask the recipients to optionally advise why they are unsubscribing. Many companies require recipients to log in to their account in order to unsubscribe and that added effort, when the person is already finding you intrusive, only makes things worse.
- **Formatting:** Believe it or not, bots suspect emails to be spam also by the way they are written. Some of the things they red flag can include:
  - Using a wide variety of font sizes (especially bigger than 12 points), styles, and colors
  - Using all uppercase letters
  - Including several links to different domains
  - Using exclamation points in the subject line
  - Using symbols and numbers to help spell words
  - Including too many large images
- Regularly check the domain and IP reputation. For example, for emails going through the GSuite, Google Postmaster is one place to do this.

## 10.3 Conclusion

Operational alignment is needed to learn from the past, manage the present, and prepare for the future. The corresponding teams have to apply best practices and set procedures to the activities undertaken by the brand journey functions, measure and keep track of their performance and effectiveness, and manage the technology stack in place to support these functions.

Operational automation helps to sustain competitive advantage and a growing number of potential and real customer cycles. To do so, Una has to keep her brand experiences consistent for her target audience and be agile enough to act quickly on incoming insights. For that, she has to be able to generate insights in real-time, which is difficult to pull off manually.



There are several elements to operations that one must keep in mind. First is the need for a suitable central repository system which acts as a base for all incoming data and its processing. Any software has to be customized to suit the particular business needs. But while different teams within the organization can each have their own customization requirements, the organization should ensure that the data can flow from one system to another seamlessly for cross-functional insights.

BI dashboards allow visualization of insights from data on the CRM, which are essential for the management to make sense of data and what's going on. It is particularly needed when the database grows or teams adopt specialized software to execute specific tasks along the brand journey. However, they must be careful not to overload themselves with technology and end up suffering from stack fatigue. Reporting on the insights, meanwhile, allows performance measures and ensuring that they meet or exceed expectations at least in the critical key performance indicators (KPIs) set by the team.

The operations team is also concerned with ensuring that all technology is used in legally, ethically, and strategically compliant ways. With more customers, comes more responsibility. This particularly includes the big-ticket audience like the restaurants she has partnered with. Her relationships will determine how long she may have to drive her customer growth on her own. With good relationships, Una has the potential to also set her customer acquisition wheel on auto-mode where her happy customers start to refer other customers back to her. Before she gets there though, she still has to work on her brand credibility and facilitate its engagement.

## Questions

1. Which of the following are NOT the responsibilities of marketing and sales operations?
  - a. To ensure the processes are running in a timely manner
  - b. To ensure the processes are being followed
  - c. To ensure that the data is being entered
  - d. To ensure that the performance of marketing and sales teams are optimal

2. Operational alignment must be done early because it becomes more and more difficult to do without disrupting existing processes, as an organization grows. Is this statement true or false?
3. A central software that forms the base of the technology stack is the central database; usually referred to as \_\_\_\_\_
4. It is more important to ensure that a software is customized to suit a specific team's needs than to ensure that it is aligned with the customized instances being used by other teams. Is this statement true or false?
5. Business Intelligence (or BI) software is often used to visualize insights for easier reporting and understanding. Is this statement true or false?
6. A lot of software can often see businesses spend more time managing the technology rather than managing the business. This is also known as \_\_\_\_\_
7. The benefit of carefully planning the process and tools needed, deciding on which ones are best fit and most suited, customizing it to a team's needs, and training the team to use it well, is that the tech stack will not have to be modified later. Is this statement true or false?
8. Every organization sets certain metrics also known as \_\_\_\_\_ to continuously track performance.
9. \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_ act as gatekeepers to check if an email source is authenticated and validated to not be spam.
10. If in the US, you can send recipients unsolicited emails until they "opt out", a US based company only needs to ensure that its mailing list does not contain recipients who have opted out. Is this statement true or false?

## **Answers**

1. D
2. Customer Relationship Management system, or CRM
3. True
4. False

While customization of a software to suit a team's specific needs is important, it is equally important to ensure that it doesn't operate in a silo and that the data can be linked to or used with data coming from other teams.

5. True

6. Stack fatigue

7. False

While all those steps are best practices, technology becomes outdated and organizational needs evolve with time. This is why most organizations find themselves stuck with dated practices that were once role model. Process modernization and changes in tech stack is needed periodically, which is why the right balance has to be struck in adapting to times without causing too much internal disruption.

8. Key Performance Indicators (KPIs)

9. SPF, DKIM, and DMARC

10. False

If the US company's mailing list contains Canadian recipients – and Canada's laws state that no one should receive emails until they "opt in" to the mailing list – the company will have to ensure that its mailing list complies with the two differing laws for recipients in the two neighboring countries.

# CHAPTER 11

## Brand Credibility

With Una's online presence wide and frequent enough to build recognition and recall, she now has to build credibility towards her brand to strengthen positive recall and trustworthiness before her target audience decides to try out her bakes or attend her online classes. In this chapter, we look at how Una can now turn her focus from launching her brand positively to winning her target customers. She has already built her house, set up a "welcome" banner with her web presence and promotions, and checked the *plumbing* in the house to make sure the systems are functional; thanks to her operational alignment that we looked at in the previous chapter. Now, it's time to influence her audience to come in, without having to ask them to do so one by one in-person. That is an embodiment of marketing in the modern era.

### Structure

In this chapter, we will discuss the following topics:

- The importance of brand credibility
- Influencer marketing
  - Association with credible elements
  - Recognition
  - Thought leadership
- Credibility through customers

### Objectives

This chapter provides the bridge between a brand and the customer by establishing an intention in the minds of the prospect to engage with the brand. By the end of this chapter, you will be able to understand why brand credibility matters, what influencer marketing is, what kind of promotions

help establish brand credibility, and how customer success ties into brand credibility.

## **11.1 The importance of brand credibility**

Brand credibility is about achieving a positive reputation and authenticity in the eyes of your prospects that is strong enough to influence them to engage with your brand. You may come across numerous studies that put the brand credibility stage *after* the brand engagement stage. These two work closely with, and reinforce, each other. A lot of trust in a brand is certainly built after you have engaged with or even tried it. However, we find that to be a culmination of the trust-building process that begins much earlier.

One of the biggest shifts in the modern era has been that the customer now makes decisions far before he engages with a brand. In order to decide to engage, you have to trust it to be worth your consideration. And customers get to do that through online reviews, media coverage, and plethora of other data available to them at their fingertips. For example, if you come across the advertisement of a vacuum cleaner on discount at a store, you are likely to first check its reviews before you decide to visit the store. Similarly, for you to even enter a new bakery in town, the shop will not only need positive awareness but also some degree of credibility that it may be worth coming into. Nonetheless, credibility and engagement go hand in hand, and always rely on each other. And that is an important lesson to keep in mind.

In this chapter, we will look at some of the ways that help a brand gain credibility. As discussed earlier, there are promotions designed precisely to achieve this, and may even use the same platform or channels as ones that help build visibility. Then again, two similar products may go in entirely opposite directions to build trust. Whatever the choice, the message intended to build credibility has to comply with the following two criteria:

- It has to be in line with the brand positioning.
- It has to be in line with what a customer already trusts.

Remember that trust is a sensitive and intimate feeling. So, even if a trust is established, authenticity cannot be sacrificed on the way if you want to keep that trust from breaking. Customers' perception of authenticity is generally linked to what they already know and trust. We always draw parallels to

personal relationships, and the value of trust and the path to achieve it becomes very clear. Similarly, there also cannot be a difference in the positioning and the credibility message because that once again raises eyebrows or confuses people, both of which are impediments to building trust.

Consider the example of two medicinal products from two companies: Buckley's and Jamieson. The former produces cough syrups that help battle colds. The latter produces nutrition supplements, including pills for Vitamin D. Both are often intended for the same customers and yet, the two brands have gone in opposite directions to appeal to them. Buckley's aggressively promotes the tagline, "It tastes awful, and it works." Jamieson, on the other hand, has produced a version of Vitamin D in the form of sweet chewy gummies, available in orange, strawberry, and lemon flavors. Both strategies work.

The two products are not competitors, and while in the same domain, are also perceived differently. One is seen as a "*life-saver*" medicine in brutal cough and cold while the other oscillates between an "*important to have*" and a "*good to have*" supplement, depending on the individual's general health and the time of the year which can impact the amount of natural sunshine he gets. That changes the dynamic completely. Buckley's understands that its consumers are counting on it and want a sure thing to get rid of their illness. Now, medicines are perceived to carry a bad taste. In fact, the worse the taste, the stronger we feel the medicine is and the more reassured we become of its effectiveness. Buckley's tagline supports that notion proudly, and as decades of success have testified, "*it works*" in helping customers trust the brand.

Jamieson, on the other hand, knows that its product is seen as optional at most times. For a product intended to be consumed every day, the company cannot expect its consumers to put themselves through the same experience they go through with Buckley's. The trick is to improve the consumption experience. But, simply making it sugary can also make it seem unhealthy for regular doses. So, Jamieson has instead chosen a product and consumption experience that its target already likes and is familiar with: gummy bears.

Both Buckley's and Jamieson show how credibility is dependent on the target market and promise they are positioned around, and both deliver it without challenging the perception customers hold and trust around such products.

But there is one brand that took it a step further, by evolving the existing perception around a product with the use of associations that customers already trusted for the new direction the company was heading in.

*Havaianas* is a Brazilian company, popular for making premium flip flops. The product itself was rarely given a serious thought in fashion circles, certainly not in comparison to its more prestigious cousin: shoes. So, when the company wanted to go global, it knew its “*cheap flip flop maker*” image wouldn’t work and it also couldn’t compete with the local flip flop manufacturers on price. In order to beat out the local competition, it needed to differentiate itself. The company decided that its customers needed to associate quality and upscale trendiness to a casual item like flip flops, if they were from Havaianas. To achieve that, it turned to those whom the customers already perceived as such: celebrities. The consequent Havaianas turnaround is an example cited in B-schools to this day. (1) It’s repositioning also serves as an example of how Una can revisit her brand positioning if her market changes or insights challenge the assumptions she started out with.

## 11.2 Influencer marketing

In order to purchase Una’s breads or enroll in her online classes, her brand-aware prospects first need to develop an intention to buy from her. That intention is generated by a mix of positive perception and trust. Brand credibility helps a prospect validate that the positivity around the brand is not just his or her perception but a fact. There are a few ways that can be used to achieve it, one of which is often referred to as influencer marketing. It is the strategy of leveraging elements that can positively influence potential customers to consider engaging with the brand and making a purchase.

Influencer marketing is important because brands can influence their audience even when being assessed remotely, without waiting to first meet the audience. In the modern era, that is a necessity. That said, influencer marketing is also active during direct exchanges between a brand and its customer. For instance, as we will discuss shortly, featuring in a panel at an event can allow Una to build a perception of her expertise and further influence the audience she is engaging with. The same holds true for her online classes where the students may be inspired to order something from her shop. Of course, these are longer plays compared to associating with elements that the audience already trusts. Likewise, existing customers play a

major role as influencers for new customers. We will discuss this more in a bit. Let us start by looking at some of the ways credibility can be achieved.

## 11.2.1 Association with credible elements

As we saw in the case of *Havaianas* and *Jamieson*, one of the surest ways of developing credibility for a brand is to associate itself with other credible elements, either directly or in an implied manner. For instance, when Tom Hanks visits a cafe, the cafe immediately develops credibility for the quality and taste of its coffee because the majority of people trust *Tom Hanks* and his choices.

*Tom Hanks* may be a far stretch for Una just yet but her job is to minimize that distance over time. *Mr. Hanks*, after all, would enjoy a truly special bread. Reaching him will imply working from ground up to build credibility, while also infiltrating the channels that cater to him, which we will see later. In the early stages, Una had swapped blogs and gotten herself featured by local or smaller bloggers. With the presence and following she has gradually built, Una's task is to now start reaching out to bigger influencers and media personnel who will be willing to feature her, and whom others trust. This cannot be a one-day or a one-shot job, and that is why building a brand takes time. One may speed up visibility but the same cannot be said about trust. That takes time.

Una's next task is to compile the list of influencers in her domain and to reach out to them. Same holds true for the press too. In case of the latter, though, Una would need a story worthy printing. When it comes to media, besides organic coverage, Una can also opt for paid coverage. This is similar to ads but one that looks more natural. A sponsored article is just like a news post but one sponsored by a business. However, an outright salesy article talking about Una's breads is more likely to backfire. That is because it would have sacrificed on the authenticity of the content and would make it look biased. A better option for Una would be to offer something truly worth reading and unbiased, such as the importance of eating fresh or the origins of bread or something else entirely. The article needs to only mention Una's bakery as an example or refer to the author. If the article appeals to the readers, they will look Una and her bakery up automatically. Depending on the product, a handy offer exclusively for these readers can now help improve the conversion rates of readers to buyers.



If Una finds it too difficult to find, vet, and track relationships with influencers, social bakers (2) (now, Emplifi) is an AI-driven influencer dashboard that can help her streamline some of the process. As shown in [Figure 11.1](#), it can help find influencers, avoid frauds, and even help Una determine whether the person she is planning to hire is a good match for the audience she is planning to target:

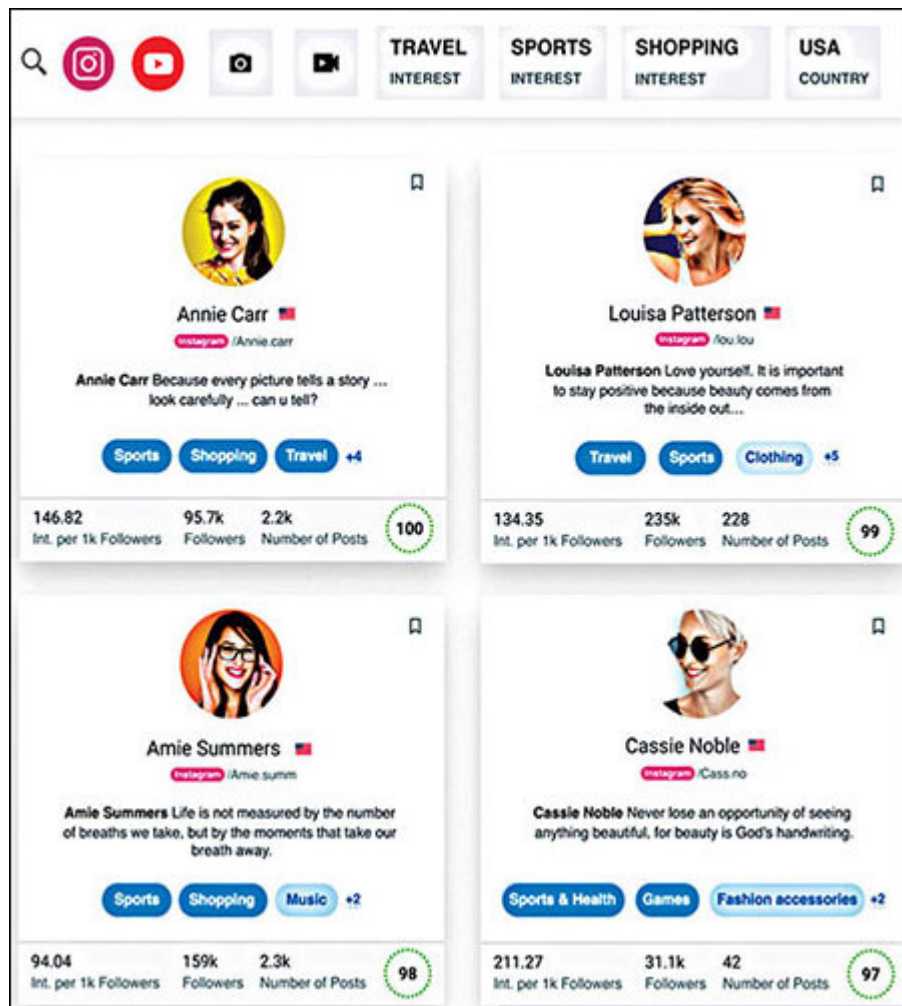


Figure 11.1: Influencer discovery on Socialbakers (3)

## 11.2.2 Recognitions

Are initial bloggers sufficient to entice bigger bloggers? The size of Una's following helps of course. But this is where some measure of recognition comes in handy too. Every industry has its awards and recognition lists, hosted by one or another party. For more mature businesses, rolling out one

of its own is in fact a great way to extend credibility. For instance, at the right time as her business evolves, Una should consider hosting a baking competition of her own on a local or expanded level, or start reviewing other breads. As the de facto judge, she would immediately wear a credible hat.

For now, Una has a better shot at participating in these or making it to some list of *Top 20*. Recognitions generally carry an unspoken time stamp, and their value tends to decrease after a while. No one would care much if Una carried a recognition from 10 years back, unless it were a truly prestigious one.

Recognitions are important for another reason related to building Una's influencer profile. Given the way winds are changing in this domain, individual influencers can carry equivalent or greater traction than corporate profiles do in this space. It is perhaps because the former communicates, and can be related to, on a more personal, human level and therefore carry more authenticity. For instance, at the time of writing, Udemy – the global learning channel – has 205 thousand subscribers (4) on YouTube while Khan GS Research Centre – a channel run by Khan Sir, an educator from Patna, India – has over 13.3 million subscribers (5). This is why companies, even if they focus on building their own subscriber base to share and promote their products, hire individual influencers to influence potential customers on their own channels.

As may be apparent, marketing initiatives necessitate continuous investment into recognitions, coverage, social media, and the content itself for SEO purposes. As more and more channels build up, the sheer volume of these regular tasks do too. That is why these fast become a beast of their own and necessitate more automation.

### **11.2.3 Thought leadership**

Thought or coaching leadership is one of the most powerful tools for personal brand credibility. This includes Una featuring in online or offline events as a guest, for instance. Another option is an online course. Originally conceived as the **Massive Open Online Courses (MOOCs)**, these courses have now proliferated to a wide range of platforms, most openly accessible. Since Una has something worth teaching – a skill that others can benefit from – she can consider designing and launching an online course share. All it will

take is developing a course structure and recording lecture videos. It is no surprise that being an instructor lends credibility. However, it can also open up an alternate stream of revenues for Una and further her personal brand. In fact, a class like this would be a great asset to offer on a discount in exchange for subscription to Una's mailing list or blogs.

Online courses, if done right, can be a side business of their own requiring online promotion and publication on multiple channels, including in book form. To be an author – though ideally not self-published – is another fabulous stream of credibility and revenue generation. And it is not as difficult or far-fetched as we tend to presume. Each of these initiatives, in their said order of execution, is feasible as long as Una carries two fundamental ingredients: hard work and patience. Quality content takes time, a lot of feedback, and a lot of revisions. The key to sustaining the bulk of customer and brand journey exists in creating and maintaining an intended perception. For the sake of feasibility, Una can arrive at writing a book at a later stage, but she can certainly start with an online course right away.

An important fact to consider here is that these attempts take time and are not necessarily advisable up front. Also, not every customer segment is open to reading or learning in detail even though this group may well represent the bulk of demand for a related offering. As a result, courses or books may not always be the best bet for Una. However, thought leadership still works in lending the perception of credibility. So, a shorter, more entertaining version of the course videos may still come handy on YouTube as a promotional channel. In other words, all that needs to change is the amount of effort and time investment that a particular initiative demands from such customer groups.

There is no shortage of online channels to launch a course; Udemy and Skillshare being the more popular ones. From a strategic perspective, these channels work similar to influencers: it's easier to get accepted by some than the others. Udacity, LinkedIn Learning, Coursera, EdX, MasterClass are all more selective, with varying degrees of filters to who can teach on them. Thanks to the MOOC boom, there are numerous smaller players too, either at a start-up stage or delivering courses for specific B2B audiences – whether companies or educational institutions. Then again, few focus on select topics while others focus only on existing university courses.

Most of these channels provide insights to help select a topic with the highest chance of success. For instance, [Figure 11.2](#) shows an excellent range of useful insights that Udemy provides, including search volumes, keywords, student demand, conversions, and much more. Of course, these figures are dynamic and are likely to change over time:



*Figure 11.2: Udemy insights for the topic of 'baking'*

Una need not depend only on third-party vendors. She can also build her own course and subscription channel using platforms like Kajabi (6), which allows websites and course creation, integration, setting up payment systems, and of course, analytics – all from a single platform.

Una’s website, partner channels, coverage, courses, books, and the bakery itself are all part of a connected ecosystem, feeding into each other. Remember that *each channel should reference and guide the customer to*

*the other channels* depending on what may suit him or her best. As an example, the online course should point the student to where Una's products are available as well as to her social media to remain engaged. If Una can build such a connected ecosystem well, she can leverage each corner in it to support and power her brand further. For the consumer, that togetherness is what makes an entity strong and worth seriously exploring. After all, Una is trying to get to a point where people want to associate with her brand.

### **11.3 Credibility through customers**

Brand credibility is also where customer success comes into play. For a prospective customer, one of the most trustworthy sources is a brand's existing customers. If the brand already has a happy and satisfied following of people who have experienced it and talked about that experience, that is great. Bear in mind that Una may still need Mr. Hanks to visit if the majority of her existing customers are in a completely different target category than the ones that would follow Mr. Hanks.

Customer satisfaction is best represented by the online reviews as those are widely available to all audiences and over a vast number, can generally be regarded as unbiased. These reviews are mostly accumulated over the vertical aggregators or directly on Google. They also operate by word of mouth. Therefore, Una's presence online is intended as much to make her visible as to allow her happy customers to voice out their endorsement.

Behavioral data and reviews also help Una confirm or thwart her original understanding of her target audience. If the target is different from what Una presumed or is best influenced by a different positioning catering to a different pain point or unmet need than the one Una presumed, it is important to surface and act on it early. In its nascent stage, Una has the option of tweaking her brand identity without significant issues. Just like operations, it becomes much more difficult once the identity is firmly established. More importantly, most of the popular influencers or media channels are likely to feature Una only once. To get the most bang for her buck on these channels, Una must have her personal or company brand identity decidedly accurate.

In order to make customers happy, the quality of service and support to them needs to be top notch. While Una only needs to spend a few minutes catering to an individual buyer at her store, her business customers may require more sustained attention, as we will see in the chapters dedicated to customer

success. The effort also involves her conduct online. For instance, if a customer leaves a bad review, Una should:

- Avoid foul-mouthing
- Instead respond with an acknowledgment
- Lend factual clarifications
- Offer a polite reaffirmation of how important the person's feedback is to her

Finally, she has to make sure that her customer feels heard and that his input will be taken into serious consideration for further improvements. Of course, copying and pasting the same response to multiple complaints can show lack of authenticity, and as we have already discussed it a few times, that always breaks trust.

Another point: there is no barrier to Una doing continual research on her own. Evolved surveys, focus groups, or sentiment analysis may be tricky to accomplish for Una at an early stage, but that doesn't stop her from talking to few of her prospect customers – both individuals and restaurants, even if casually – to profile them and their needs better.

## **11.4 Conclusion**

Trust always plays an important role in any relationship, including one between a brand and its audience. To create an intent to buy from your brand, you must first establish trust in the minds of your audience. In order to achieve that, anything a brand says or does must be in line with its positioning and with something that the target customer already trusts. As long as you comply with these two rules, the field is wide open in terms of what could work in enhancing credibility. But while building credibility is one thing; sustaining it is another. Credibility built without authenticity or honesty is sure to fall apart soon after.

The field of influencer marketing is crucial in building credibility, as it helps a brand influence its potential customers from a distance. That ability is crucial in the modern era where most potential customers have already made their decision or formed a strong perception before they first actively engage with the brand.

Remote influence can be formed in several ways. They include associating with credible elements. These can be celebrities or even products or situations the customers are already familiar with and trust. A brand can also leverage coverage by influencers and media without sounding biased, which is often the issue with paid coverage. Recognitions are a great way to build prestige and help reassure customers that a brand is worth its salt. But nothing delivers the latter better than thought leadership, which is a direct avenue for a brand to display its expertise. That can be achieved through published books, talking at conferences or in the current era of MOOCs, teaching through online classes.

Credibility and customer success go hand-in-hand, and that is another great – albeit necessary – path to follow. A happy customer can take your brand a long way by lending it their support in the form of reviews, word of mouth promotions, etc. To build this following of happy customers, Una would first need to understand and validate her target audience’s preference and positioning alignment. As we will see in the final section, service plays a crucial role but many often forget that you don’t always have to go out of your way. Basic politeness and receptivity can work wonders too, especially when dealing with customers complaining publicly on online channels.

## Questions

1. To establish brand credibility, the messaging has to be in line with the brand \_\_\_\_\_ and something the target customer already has established \_\_\_\_\_ in. The latter can be done directly or in an implied manner.
2. Despite a compliance with positioning and use of trusted elements, brand credibility may fade if the messaging wasn’t authentic and honest. Is this statement true or false?
3. Associating with celebrities always works to make a brand seem credible. Is this statement true or false?
4. Influencers can range from celebrities to bloggers to other individuals with a large following, to even existing customers. Is this statement true or false?
5. Sponsored articles are designed to be outright salesy. Is this statement true or false?

6. \_\_\_\_\_ is one of the most powerful tools for personal brand credibility
7. Imparting knowledge on a subject is a great way to build credibility. When may it not be needed or effective?
  - a. If there is nothing new to offer on a subject than what is already well known and understood by the target audience.
  - b. If the audience receiving the knowledge is necessarily different from those buying the product/service.
  - c. If the knowledge will help the customers better understand how to consume the product/service or get more value out of it.
8. Brand credibility for a customer is influenced by Customer Success. So, why is it that customer success does not directly come into play in the brand credibility stage?
  - a. It is incorrect. For a first-time customer, brand credibility requires the Customer Success team to necessarily be involved with Marketers and Sellers.
  - b. Customer success cannot be involved with a person unless they become a customer. A person cannot become a customer unless they first find the brand credible.
  - c. Customer success helps build brand credibility among those close to a customer. But the customer himself must have already found the brand credible enough to make the first purchase.
9. While responding to customer complaints online, it is important to:
  - a. Offer a solution immediately
  - b. Focus on being polite
  - c. Focus on being accurate
  - d. Focus on being empathetic
10. Changing the positioning over time may be needed but risks damaging the brand credibility. Is this statement true or false?

## Answers



1. Positioning, Trust

2. True

3. False

A celebrity endorsing an unrelated product may only succeed in building visibility. In fact, the celebrity endorsing an aspect of the brand other than what requires credibility to establish trust is likely to not work at all.

4. True

5. False

While sponsored articles are often written explicitly to incur more sales to justify the investment, they need not be outright salesy. Being more value driven may work far better.

6. Thought leadership

7. A

8. Both B and C

9. B, C, and D

A solution may not always be possible immediately. Instead of setting such an expectation, it is more important to be factual and honest, and to instead reassure the customer that you're trying to address the issue as fast as possible.

10. True/p>

Brand repositioning can be successfully done, but the organization has to be careful to mitigate any risks to its established credibility.

# CHAPTER 12

## Brand Engagement

Among the first four Ps of marketing mix, or the Tier II strategy, Place plays the most important role at this stage of a brand journey. That is because brand engagement is a stage where your target audience gets familiarized with your product and interacts with it. That interaction may be physical or online but would mostly occur over channels where the brand owners may not always be directly available. In this chapter, we will look at how to leverage channels and engage potential customers effectively.

### Structure

In this chapter, we will discuss the following topics:

- Why engage?
- Direct engagement
  - Channel marketing
    - Personalized experiences
    - Real-time conversations
    - Timed triggers
    - Email marketing
  - Account-based marketing
- Indirect engagement
  - Partner marketing
  - Affiliate marketing

### Objectives

This chapter looks at how a pre-purchase interaction between a brand and its potential customer occurs effectively. By the end of this chapter, you will be

able to understand the importance of brand engagement in winning customers, ways to engage your target audience with your brand and offerings, the changing trend of focusing on specific individuals or accounts to engage, and how to identify the right channel partner and strategy for your brand.

## **12.1 How does engagement help sales?**

Engagement is about facilitating the customer interaction with a brand and ensuring the subsequent sale. That is achieved by making it easier for the customer to access the brand, either directly or indirectly. Consider the example of the tourism industry, badly hit in 2020 due to Covid-19. It led the governments of Barbados (1), Mauritius (2), and Iceland, three of the world's top travel destinations, to launch extended stay visas, which would allow travelers to stay and work from the country for up to a year while they are in self-isolation. If you have to live in a world of restricted mobility, where better to do it than in these vacation spots!

Among the three, Iceland (3) was more specific and selective, looking to only attract the wealthier group (earning more than \$88,000) who could work remotely from the country and add to its economy without taking its jobs away. Such selective targeting is where channels come very handy. Consider Airshare, the aircraft fleet management and fractional travel share company that allows flyers to share jet access for their private trips without having to own one. Or the luxury fashion brand Balenciaga, which unlike Armani or Dior, most would not have heard of, were it not for Cardi B's hit single: *I like it* (She says "*I like those Balenciagas, the ones that look like socks.*") These companies are selective enough to ensure that they only utilize the specific channels where their target customers are. In an era of AI-enabled hyper-tracking, they no longer need to be selective in their choice of magazines, locations or other channels; the online ad algorithms can do it for them.

Each of the above examples still deal with direct engagement. But indirect engagement is something each one of us is even more familiar with. It is what we encounter every time we are out grocery shopping. Major retailers are the most effective channels for manufacturers to engage with customers. The specific placement of its Panettone (an Italian sweet bread; a type of dry cake) during Christmas can help Bauli, an Italian manufacturer, to enable a

customer across the Atlantic to experience the cake, learn more about it, and choose it over other competing cakes at his neighborhood grocer's.

Just like with its customers, brands are also selective about channel partners, as we shall see in this chapter. That depends, of course, on who and where the target audience is. Through her increasing social media following, online courses, and an evolving stream of features on other websites, Una has steadily built her bakery's brand presence, gradually bringing in customers ranging from the early adopters to those prone to some deliberation. She has now arrived at a stage where the next task is to sustain her following. Positive perception and credibility may help these customers develop an intention to buy Una's bread. However, for Una to turn that into an actual sale, she has to make her product easily accessible to purchase for her customers. For that, she too needs to now think about her channel strategy to allow interested people to interact with the brand and its offering.

In fact, while Una has been getting footfalls in her store and some personal following online, she is missing a stable base of regular customers to keep her business growing. It is also time for Una to now turn her attention to the B2B world and leverage all her hard work to bring businesses on board.

As seen in the preceding examples, engagement can be facilitated directly or indirectly:

- Direct engagement for Una can include those who sign up for her online baking classes, register for her course, visit her store, or interact with her in other ways.
- Indirect engagement corresponds to her channel partners and affiliates.

## **12.2 Direct engagement**

Una has gradually enabled this channel from the very beginning in setting up a payment system on her website, listing her business on the vertical aggregators that allow sales, using services like online ads or Google Maps to encourage customers to try her bakes, and engaging them with photos, videos, and lessons on her unique baking skills. Direct engagement involves Una reaching out directly to potential customers and focusing in two directions: individuals and entire organizations or teams. The latter is often addressed as "*accounts*" and falls in the purview of a technique called **account based marketing (ABM)**.

## 12.2.1 Channel marketing

This form of direct engagement has historically referred to the conventional reach outs, via mail, email, phone or other online or offline channels. However, the era of AI is already toppling conventions by enabling micro-targeting and hyper-personalization of messages, which can even customize reach outs for every individual. This wasn't practical in the pre-AI era but as AI advances, expect such marketing activity to only increase in focus.

Channels can range from websites and vertical aggregators (third-party sites allowing people to buy Una's products) to store-front and apps that deliver food to customers. "Omni-channel" is a commonly used term that describes a seamless deployment and management of all these channels simultaneously. It is one of the most powerful and critical aspects of marketing (and sales) that Una has to manage. It is also the reason why selling is becoming more and more indirect, with customers making purchase decisions as well as the actual purchase remotely across multiple devices. In many cases, the company never directly meets the customer before a purchase is made – a reality FMCG companies are most used to.

A successful omni-channel presence is not easy because it banks squarely on technology enabled data transfer in real time and brand consistency on every channel open to the customer. Hyper-personalization software is being utilized in more areas of a brand journey due to their tremendous benefit across channels. However, due to the nature of information they yield, they can also be the first ones to breach privacy laws, which is why a careful consideration of the software you buy is important.

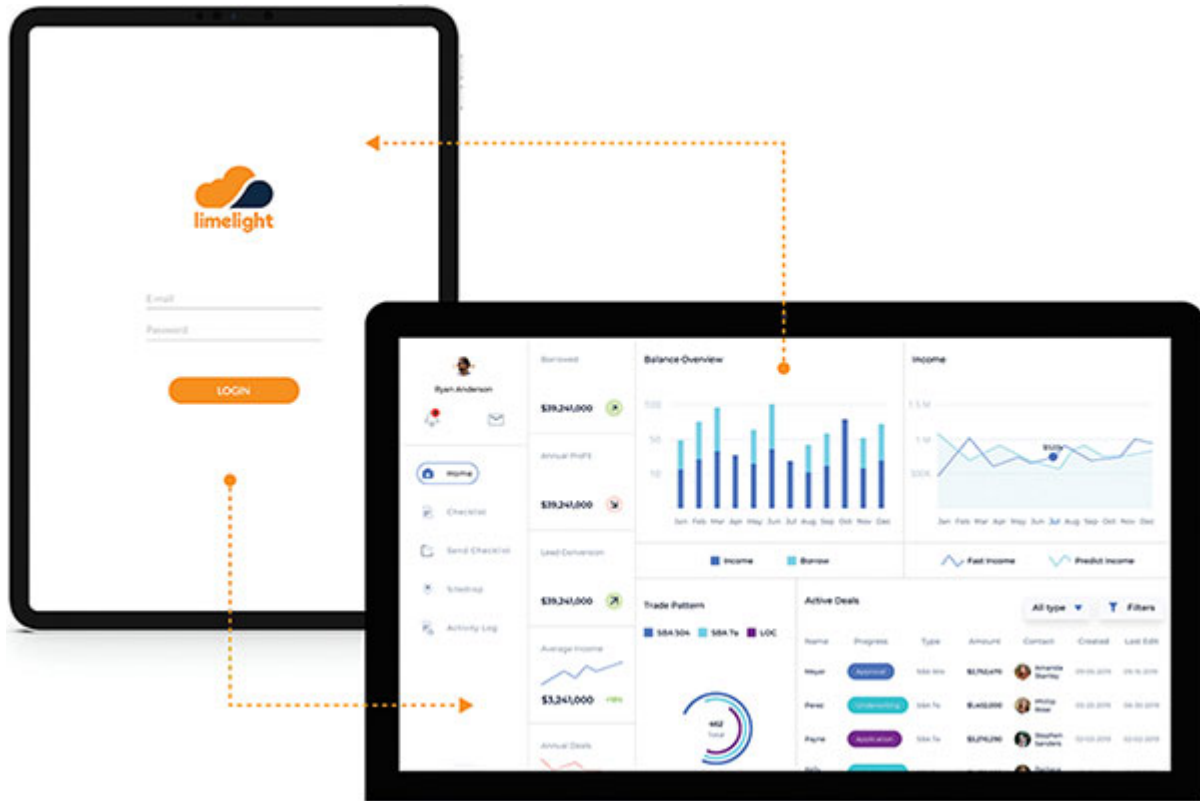
Una can use tools like Phrasee (4) to ensure consistent brand message as shown in [Figure 12.1](#), by analyzing the brand language variations and ingesting the standard to be applied everywhere:



*Figure 12.1: Phrasee Brand Language Optimization (5)*

The tool allows timely messages across the customer journey, particularly at key engagement points, such as an abandoned cart on a retail website. She can also see what copy-related aspects of her past ads were weak or strong.

“Omni-channel” also includes a hybrid channel system where a mix of physical and diverse virtual interfaces occur. The Limelight Platform (6) has been particularly useful in the Covid-era as it allows companies to better capture data (complete with a “contactless” feature) and manage direct engagement events, whether it was a trade show, sponsorship, test drives, or other activations:



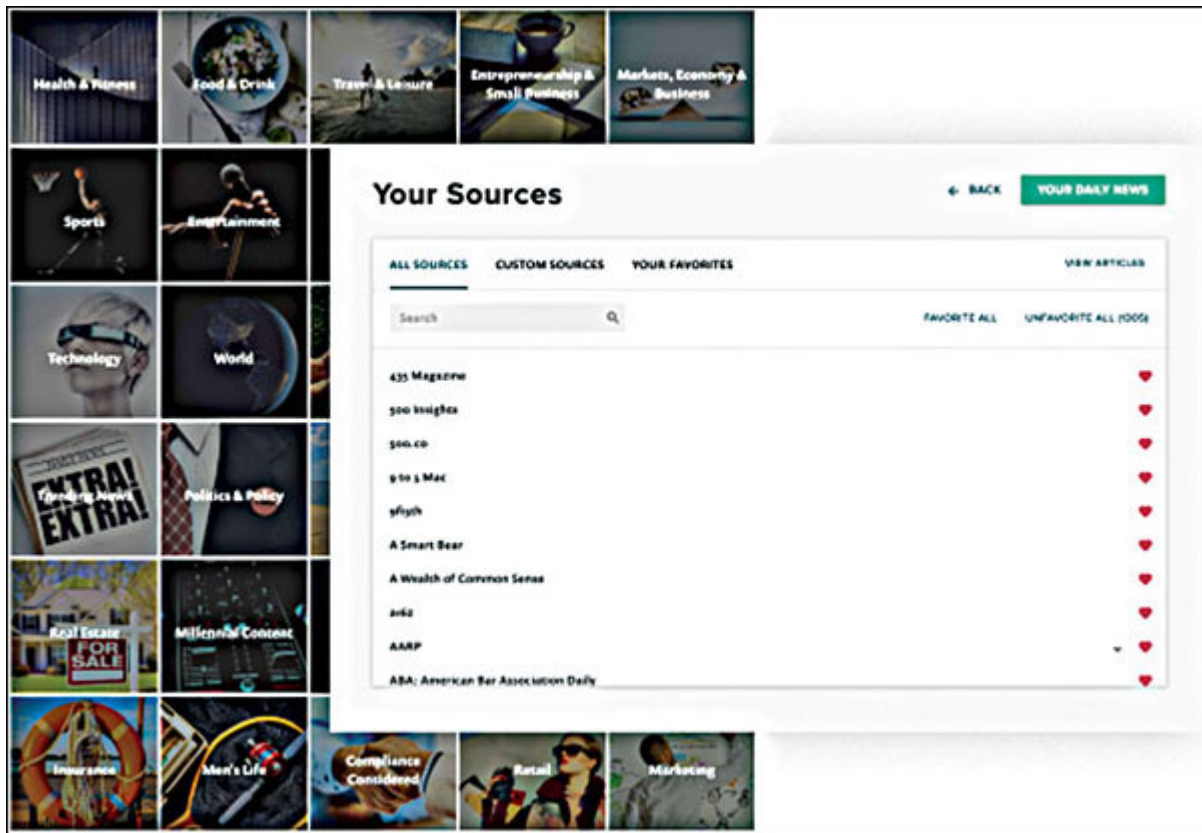
*Figure 12.2: Limelight Platform's UI (7).*

Regardless of the channel, brand engagement is a stage meant to encourage and accomplish a successful sale. As we will see in the next chapter, dedicated sales teams may be required for longer sales cycles as in many B2B industries where a lot of nurturing and conversations are needed to directly help with sales by, at the very least, providing leads for sales teams to pursue. But even in such cases, the brand engagement stage helps provide qualified leads to pursue and nurture. Sales enablement through brand engagement can happen in a variety of ways. Let's look at a few such examples.

### **12.2.1.1 Personalized experiences**

The first mode of enabling a sale is by ensuring relevance through personalization of the customer's experience engaging with the brand. Vestorly (8) does this beautifully by optimizing the discovery, filtering, and personalization of content. It can look at Una's social media followers, website visitors, customer lists, even any existing customers, and segment them into distinct user profiles based on their engagement with Una's brand.

It can then show personalized original, third-party and licensed content on Una's channels, thus increasing engagement. [Figure 12.3](#) shows some of Vestorly's many sources from where it can mine relevant content for Una's different audience profiles:



*Figure 12.3: Vestorly's sources view (9)*

### [12.2.1.2 Real-time conversations](#)

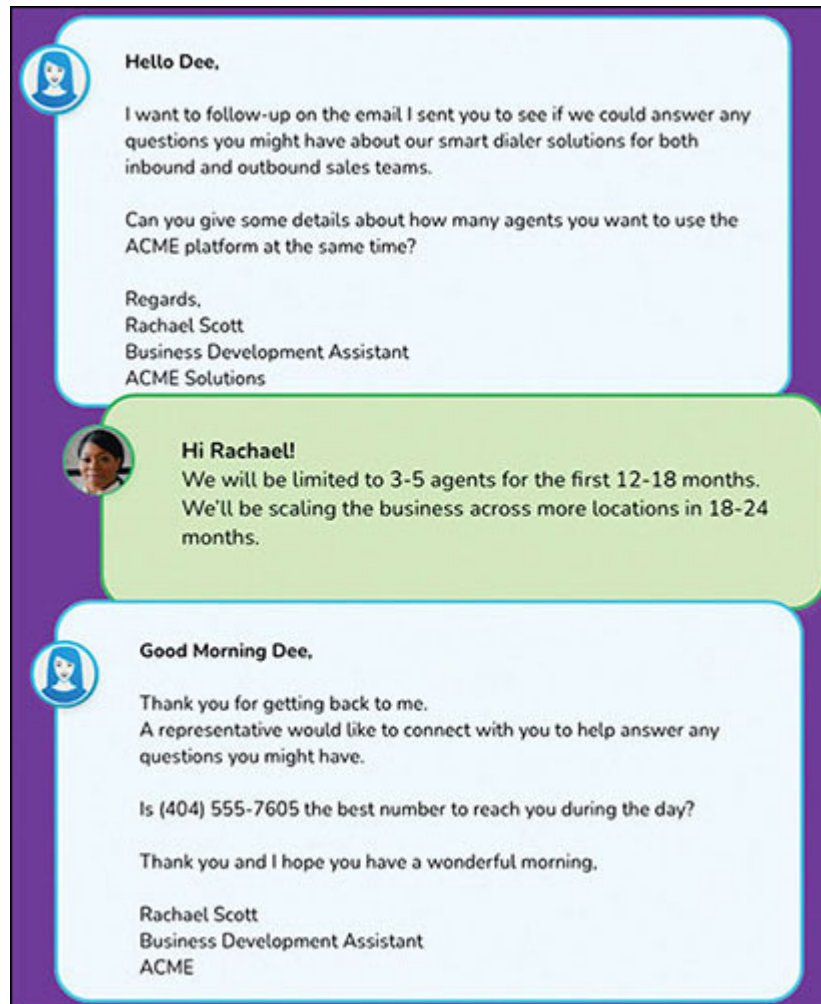
Nothing stops a brand from actively reaching out to a customer engaging with it. Automat ([10](#)) can handle the personalization and content discovery too and is particularly useful for ecommerce websites that would like to recommend better products, personalize the shopping experience, and even converse with the customer, as exhibited in their mock-up image in [Figure 12.4](#):





*Figure 12.4: A conversational mock-up from Automat (11).*

Conversica (12) is designed for the job as it can not only automate two-way personalized conversations but also score the resulting leads based on metrics that focus on prospect “health”. An example is shown in [Figure 12.5](#):



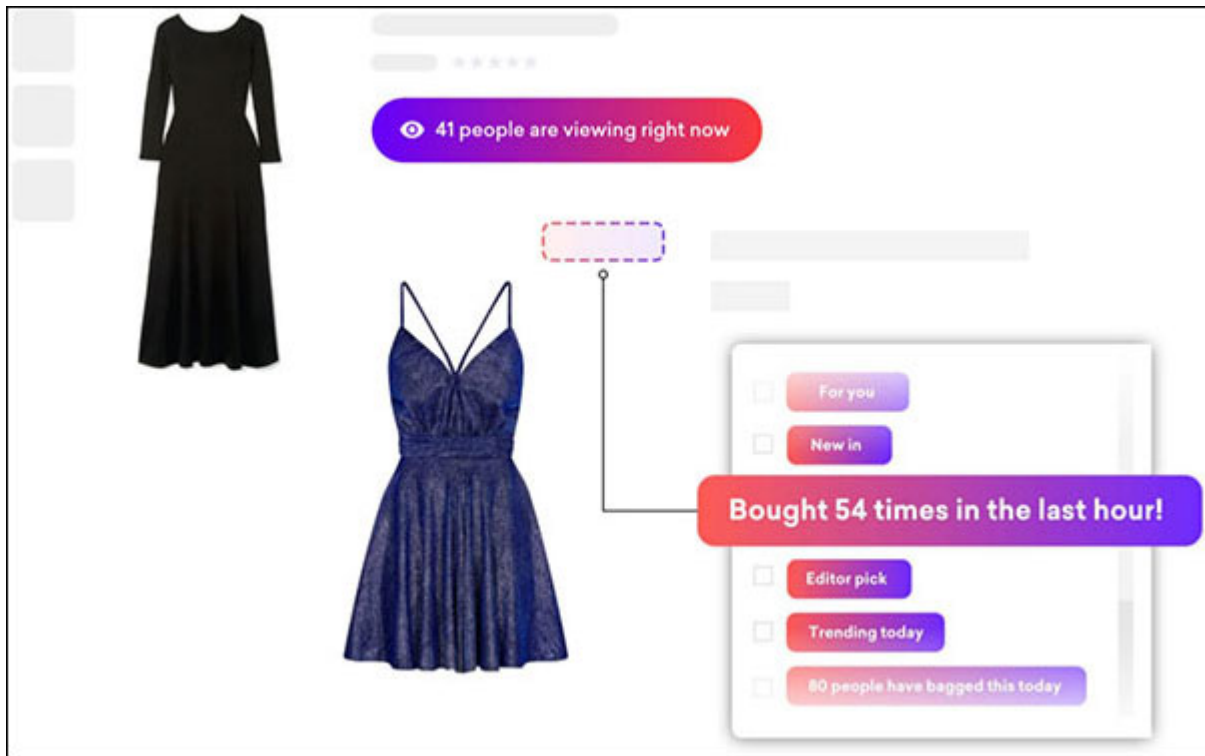
*Figure 12.5: Conversica in action (13)*

Conversations can be a great opportunity to push a product sale to a customer, but with most product purchases happening without it (particularly, in ecommerce websites), other triggers are often needed to persuade the customer into making a purchase.

### 12.2.1.3 Timed triggers

The example of Phrasee we discussed earlier is an example of a timed trigger. Despite the personalization and relevance of what they see, customers may hesitate due to their own doubts and uncertainties that have little to do with the brand. They often need reinforcements and that is where **Social Proofing** comes into the picture. If you noticed the Automat example above, “100% right for you” was a type of reinforcement designed to convince the customer that she was making the right choice. Tools like Qubit

(14) take it a step further by enhancing credibility of reinforcements by allowing them to come from other customers, as shown in [Figure 12.6](#):



*Figure 12.6: Qubit's social proofing (15)*

Another example of a timed trigger would be to offer discounts or other such incentives at the right moment. As shown in the mock-up from Appier (16) in [Figure 12.7](#), the tool can predict a website visitor's purchase intent by tracking her behavior to pop up a discount coupon to further induce a closed sale:



*Figure 12.7: Appier mockup (17).*

#### **12.2.1.4 Email marketing**

Emails are more of a promotional channel than a selling channel. We have touched on this topic in previous chapters while setting up Una's web presence and avoiding spam. Let us close the discussion from a channel perspective.

An email list, along with the social media following, also allows Una to announce key offers, milestones or events she hosts, thereby facilitating immediate reaction. Having the emails can allow Una to roll out periodic surveys to find crucial information about her customers in terms of their behavior, personality, and consumption conditions. For the most loyal fans, dedicated in-person or conference call focus groups is not out of question either. These consumers are fans and will be happy to see a brand value what they have to say. Let us come back to it at the end of this chapter.

Perhaps, the biggest benefit of maintaining a record of most interested customers rests with all this customer information that accompanies their emails through signup forms or surveys. If the questions are planned well to capture relevant information, they can provide Una with the clearest picture of exactly who her target audience is and what is attracting them to her. Note that any questionnaire has to be kept short to avoid potential subscribers from leaving the task midway.

Email lists have a significant advantage today also because they allow remarketing and focused online ads, as Una can feed in the information into the ad engines. That ensures relevance and top-of-mind visibility for the brand. In every case, it is Una's job to ensure that everyone on her list has willingly subscribed to her emails and consented to the use of their information.

Una can also increase her email revenue and drive costs lower by using tools like Acoustic (18) to aptly segment prospects in the email list, push relevant content and follow-ups, send timed triggers, analyze failed interactions to get to the root cause, and even decide when not to engage:

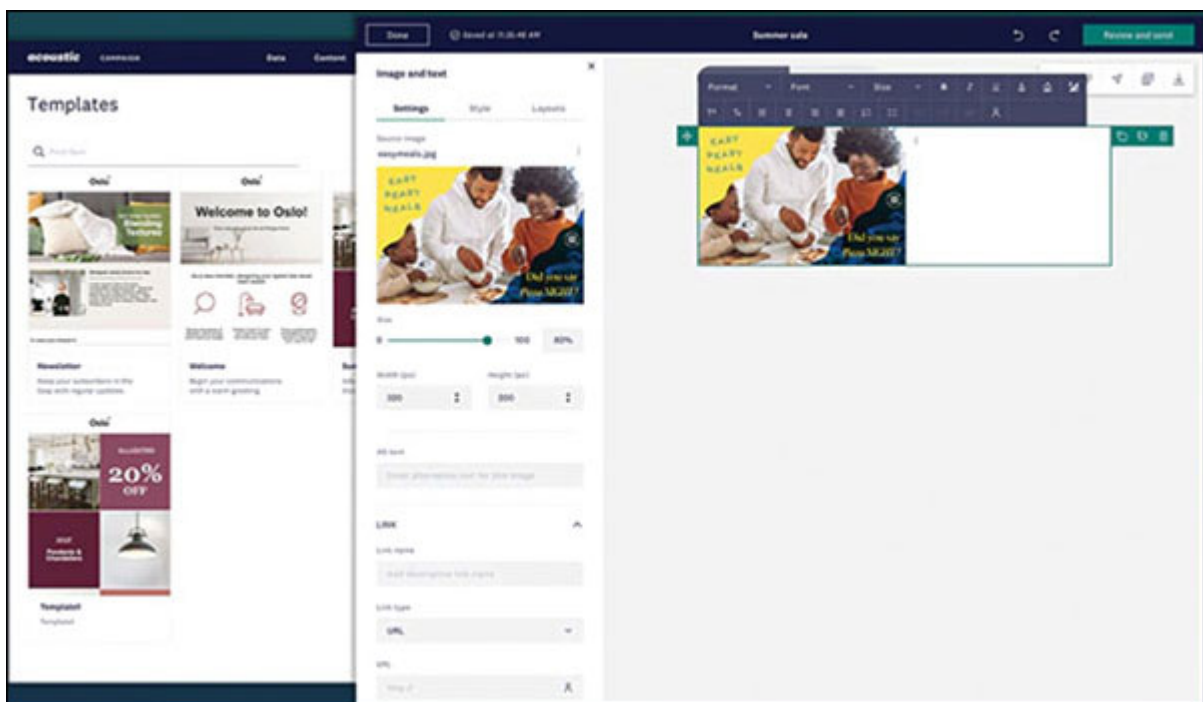


Figure 12.8: Email creation on Acoustic (19).

Newsletter subscription is a staple way for Una to engage with potential customers. The updates Una can share include educational material or things

that recipients would find immediately useful. In Una's case, it could be useful tips on baking, for instance. Building an email list of consenting consumers is a great asset that takes time and generally requires a tangible value to be offered in return, as mentioned earlier. For a customer who tries Una's cakes and loves it, the value is clear: to stay in the know of her upcoming products or to get a free birthday goodie. For those interested in baking or those looking for gift ideas even from afar, a discount to attend Una's online classes is a decent proposition. Una may even develop a small digital booklet of quick personalized baking ideas that others can get by signing up to her email list. Una can, of course, use that content later in her book too. Most retail outlets simply go for the membership card strategy, with key benefits for members only. Tools like Wishlist (20) can be handy here as a membership enabler, complete with filtered content and payment enablement for different membership tiers.

## **12.2.2 Account-based marketing**

**Account-based Marketing (ABM)** was in some ways a stepping stone to the micro-targeting strategies that AI is now feasting on. It took hold in the B2B space when companies realized that there were some accounts they just could not afford to lose, which in turn was a result of technology start-ups that were more specialized in what they did and which industry they catered to. With new technology always around the corner, and competition getting more intense by the day, reducing customer churn was key, especially for strategic accounts that often occupied the lion's share of recurring revenues.

ABM also became key for strategic marketers who, as a result of increasing focus on personalization, realized that the needs of different accounts worked differently. For example, say Una has two restaurants that are keen to buy her breads. One could be more interested in having them delivered by 7 AM for its brunch menu, while the other could be more interested in ensuring freshness at 7 PM for its fine dine menu. In this case, for the same product, one account prioritizes punctuality while other, freshness. For Una, promoting only the punctuality of her bread deliveries won't resonate with the second client. Promoting both punctuality and freshness all the time would imply overwhelming the accounts with information they do not care about. The latter, in our era of distracted and busy customers, would also prove ineffective.

ABM involves understanding each strategic account’s needs and behaviors and engaging with them accordingly. This is obviously tricky for a large volume of accounts per person, or for targeting individuals. It deals with establishing and managing relationships, while slowly nurturing the account to a closed sale, customer satisfaction, retention, and more future business. The techniques involved therein are largely similar to ones used in other areas of direct engagement. Una would still communicate with the accounts over email, call, text, or social media. What differs is primarily the tools she would use to manage the process and keep track of the relationship status with each account, as we will see in the next chapter.

One of the key challenges in ABM is to accurately understand the organizational structure (both formal and informal) and the decision drivers for the stakeholders involved. Tools like Boxxstep (21), can not only identify the hierarchy but also the influence metrics to gauge political realities within the organization. We will discuss this more under the topic of Sales. [Figure 12.9](#) shows how it even reveals the business drivers for an account at an organizational and personal level:

Business Drivers		Decision Maker	
Current State	1	Dave Closer	VP Sales
Future State	1	Reports to : Kevin Dixon	
Problems	1	ADD STEP	
Urgency	2	Change	1
Outcome	3	Individual Objection	2
Consequence	2	Challenge	1
Needs	4	Criteria	2
Criteria	4	Concern	1
Constraints	1	Insight	2
Our Proposal	2	Contact Value	2
		Steps	4

Figure 12.9: Mockup from Boxxstep (22).

6sense (23) can use such historical first and third-party intent signals to help predict revenue from the accounts with its patented technology. MRP (24) takes it up a notch by helping organizations with teams across geographies with a predictive ABM platform that gives visibility into target markets to help prepare high impact engagement strategies. It is particularly useful for an omni-channel ABM.

And then there is Demandbase (25), a comprehensive platform that aligns all account data to allow B2B Marketing teams to track engagement levels, journey, and performance for each account. [Figure 12.10](#) shows its integration with Salesforce CRM:

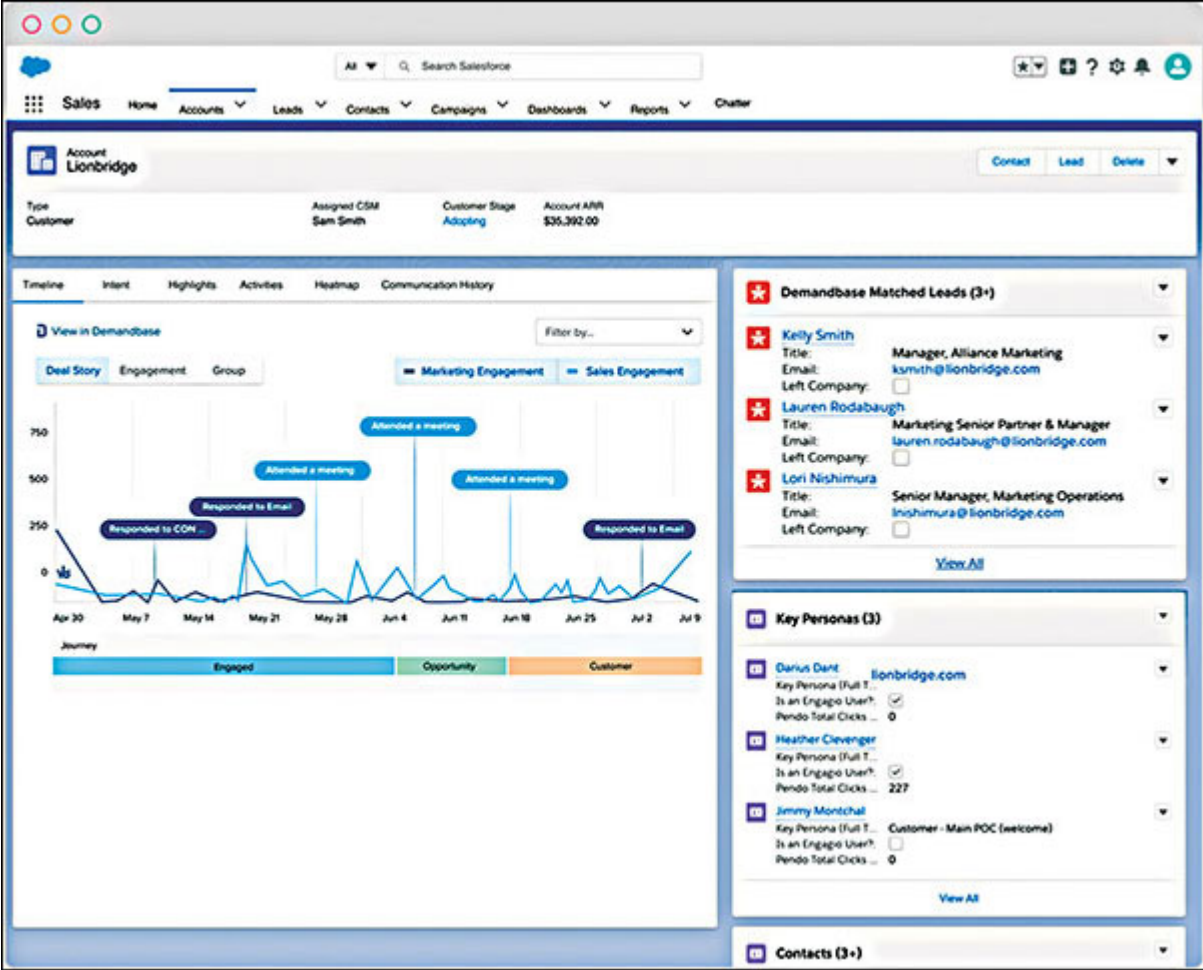
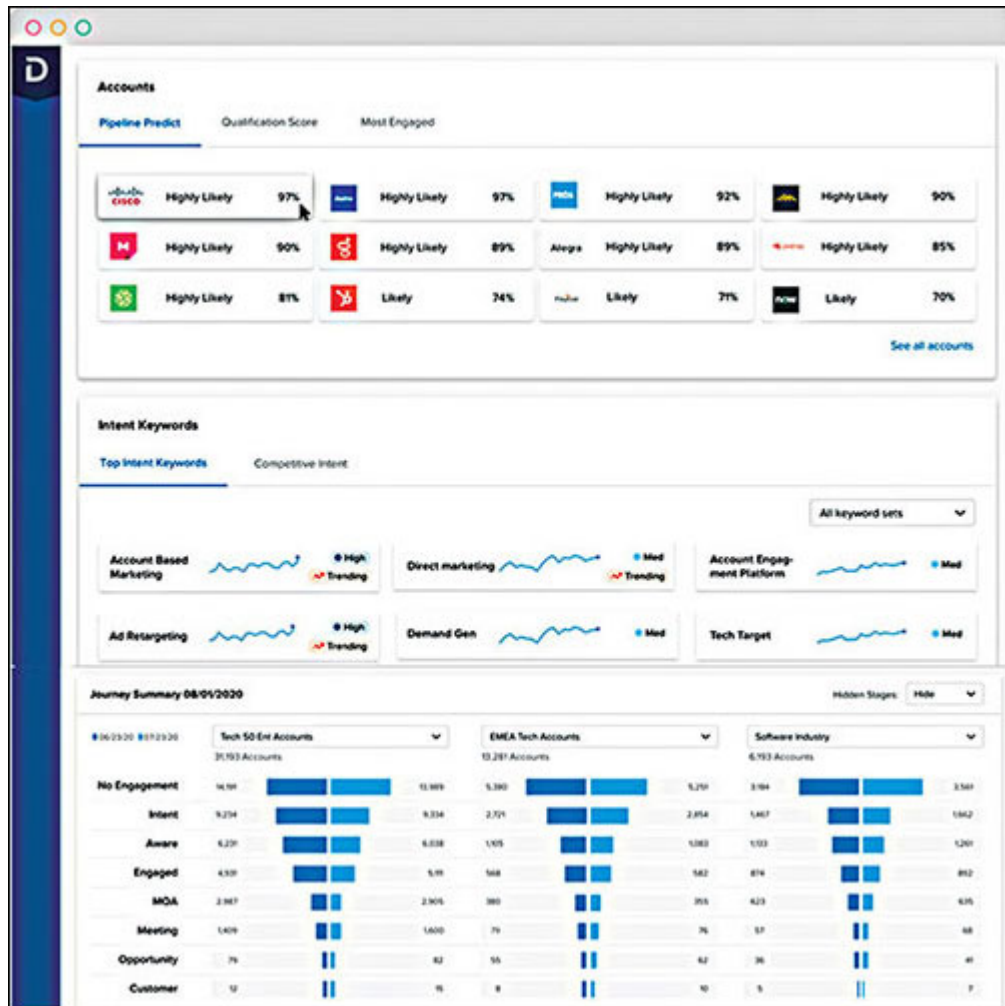


Figure 12.10: Demandbase integration with Salesforce

[Figure 12.11](#) shows its insights on the state of accounts and the pipe, further elucidating how brand engagement goes hand-in-hand with sales:





*Figure 12.11: Demandbase insights*

ABM tools are a massive bonus for marketers because keeping track of all engagement with accounts and their preferences ensures that marketers get all insights from multiple channels in one place to execute a successful strategy.

As mentioned earlier, direct engagement also deals with the consumption experience among the existing customers. From the friendliness and warmth on display in the interior and among the staff, to the tantalizing aroma, to little surprises on offer, all have a role to play in giving customers a great instant engagement. It becomes particularly vital when things are going wrong with a customer. That, though, will be our focus in customer success later.

These are all good measures to increase cash flow. But just the way Una's own ecosystem of avenues support each other, it is now time for Una to connect her ecosystem with external ones, consisting of third parties and their respective ecosystems of customers!

## **12.3 Indirect engagement**

This kind of engagement is extremely powerful and mouth-wateringly exciting to leverage because it forms the crux of a budding ecosystem. Other players have already established a steady network of customers and partners, and it can have an exponential impact on Una's business reach. Once again, Una has not been idling on this note. Let us see how.

### **12.3.1 Partner marketing**

As the name suggests, partner marketing deals with promoting products and gaining customers through strategic partner channels, owned by the company or by a third party. In the modern era, these include Una's website or social networks where she can make a direct sale. Vertical aggregators or MOOCs are other examples of channels she has already explored. But there is a vast landscape of third-party channel partners waiting to be tapped. In fact, as strategic as the name sounds, this field is actually more about creativity.

Since channels can be company-owned or external, the former are internal channels that the company directly manages itself on, and therefore experiences direct engagement with its customers. It is the external ones where things go out of its direct control, which is why the choice of partners becomes very important.

Finding partners is in some ways, a matter of creativity aimed to directly answer the question: in how many ways can I reach the most people in my target audience? Channel partners are determined by a host of factors and the list is dominated by who it is that Una is trying to target or what she is trying to achieve. In every case, Una has to be able to offer relevant value to the partner. So in many ways, the creativity boils down to exploring the ways in which Una can offer value to one party or another or create new consumption situations. Here are a few handy factors to keep in mind:

- Business location or presence
- Type and mode of product/service offering
- Complementarity (of the offering, business, customers or goals)
- Target customer group
- Non-target customer group with collateral benefits

- Business vision or growth objectives
- Assets available to the company

Consider Airbnb. For Una, this is another classic aggregator where she can enlist her bakery as a local experience for travelers and host mini-baking classes for an hour each day to invite not only locals but those abroad as well. It could thus serve as an excellent new source of revenue while building Una's network of customers beyond her shores who follow her bakes. She can even specialize in teaching small groups how to bake personalized gift ideas. And Una can host these sessions during her regular afternoon baking time if traffic is slower for her then.

Some even decide to broaden the scope to include non-target audiences who can benefit from a related product. For example, Una can supply simpler, unsophisticated breads to restaurants without broadly announcing it as that could otherwise risk diluting her brand identity.

Speaking of restaurants, we discussed early on that these establishments could mean serious business for Una as they have a demand for baked goods. The question for Una to ascertain is what exactly that demand is: is it to get unique breads, is it to get them cheaper or in more flexible timing, or something else? We are now talking about a business customer's pain point, which generally combines an unmet emotional need with an unmet business need. We will study this in [\*Chapter 13: Selling Strategies\*](#).

Nonetheless, restaurants or even the middlemen who supply goods to them may well be another channel for Una to get into. If in her line of business, certain supplies are contractually dependent on agents, they will pose serious barriers to entry for anyone trying to sell directly. In that case, Una's customer is the middleman.

Restaurants serve as a partner that can benefit from Una's product. Airbnb and Online course platforms could bring Una's target customers to her. An online food or grocery delivery channel could help Una to reach her customers more easily if they target the same customer bunch. Who are the other complementary players that her product or service would go well with, or areas that could bring together her primary customer profile?

What is Una's end goal here? Not all businesses intend to grow and grow; some entrepreneurs are more interested in a successful exit: being acquired by another player. In that case, building a relationship with potential exit

targets becomes key from an early stage. Personally, Una's goal could be to establish herself as a known expert. In that case, questions would pertain to which channels other experts appear on and are associated with. For all other purposes of personal or company brand, relationships with key players in the industry remain important because there can be synergies that lead to strategic partnering that leads to growth.

Growth can also be in other ways. Just the way Una can be a supplier to a restaurant, she may have suppliers of her own. Is there one who is keen to get a stronger foothold or expand its business vertically from raw materials to finished baked goods? Una may be in a position to aid that supplier's business objective in return for greater investment and channel or network support. Una could also stock packaged supplies or complementary products in her store, thereby playing a role as a broader retailer. What she is really doing in both these situations is leveraging her investment as a retailer rather than a baker. In fact, as Una's business grows, she too may decide to venture into packaged products of her own to supply into other retail stores. A customer living in another city would be glad to be able to grab Una's cakes without leaving his town and may even pay a premium for it.

Una can also leverage her real estate at hand. She can partner with the local interior designer who can showcase his work at Una's store and send his customers to Una's bakery to sample his work. Likewise, Una's partner could also be the local artist, or even the local cutlery shop. This approach is quite common in some countries, as it allows a healthy and non-intrusive collaboration that promotes local businesses.

There are two lessons to be learned here:

1. Most channel partnerships are a result of gradual relationship building. The partnering potential may not be obvious at first. Just like with her customers, Una cannot always accurately determine her potential partners' needs that she is in a position to cater to. Engaging with them will allow those needs to surface at the right time.
2. Every component of business is potentially an asset that can be leveraged through a partner.

Consider Una's website. We mentioned Google AdSense earlier - Google's service for displaying ads on your website. It is a channel only in theory as displaying conflicting or unrelated product promotions on one's website will

only confuse the visitor and reduce the authenticity of the website. Nonetheless, it serves as an example of the second point above (even if this is more of a last resort option). It is these little supportive threads that can make a business sustainable and be the difference during tough times.

Channel partnerships can also occur through media channels that Una supplies a constant stream of content to. It boils down to how well Una has managed to build her personal brand with the earlier initiatives to position herself as an expert in her field.

Another set of potential partners can be based on the conditions of consumption among Una's target customers. When or in what situations exactly do these customers come to Una? Is it during some sort of celebration, as she has presumed? Is it during lunch hours when the locals are looking for a quick bite? Is her bakery, with its decor, an unintentionally great place to go on a date? Or is it in fact a great late-night option when the crowd coming out of neighborhood clubs and fast-food joints is craving something sweet? What are the situations exactly that bring her customers in? And by not catering to a situation that is screaming for her attention, is she unintentionally turning potential customers away?

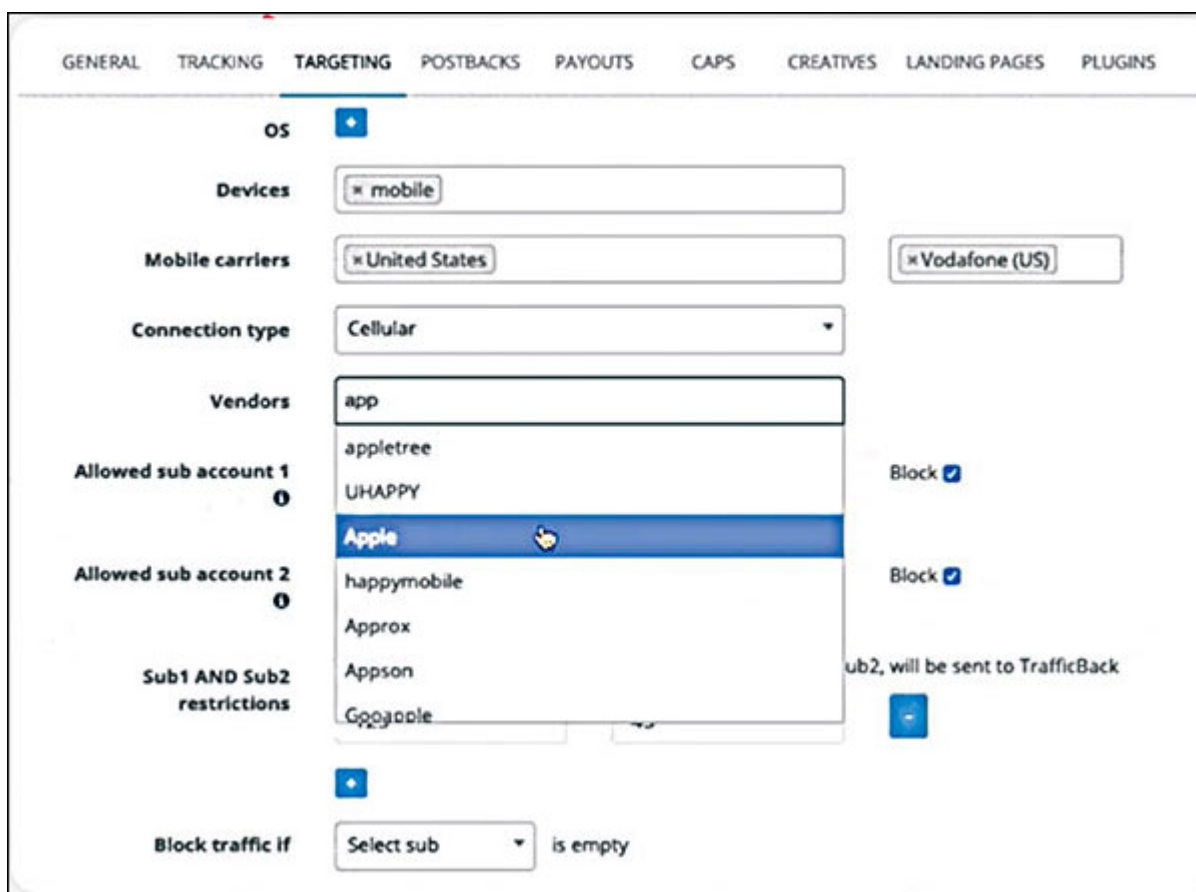
### **12.3.2 Affiliate marketing**

The difference between channel and affiliate marketing is that the latter operates at the junction of direct and indirect engagement. Most often, the initial engagement is indirect but the final sale is directly in correspondence with the brand owners. Affiliate marketing is where a company recognizes (financially) individuals (called "*affiliates*") for bringing them interested customers. It works closely with performance marketing in that affiliates are paid based on their performance (that is, an actual sale) and it is similar to referral marketing in which the affiliates are effectively referring customers to the company.

Affiliate marketing, like partner marketing, moves customer engagement out of the hands of a brand, at least initially. So, Una has to be careful in her choice of affiliates and their channels. Even as an affiliate, Una herself would need prior market research, and a niche that she can most convincingly and successfully persuade customers in. And just like for her own product, she would need a website and a promotional and selling process for the affiliate product. In many ways, the affiliate structure reminds one of the


franchise models, with the exception that prospects are redirected to the parent company to make a purchase instead of doing so directly with the franchisee.

ClickBank (26) is an Idaho-based company that runs a massive affiliate channel where brands and potential affiliates can find each other. This is a great channel to begin one's hunt for affiliates. The use of smart links, optimized ads, and better tracking has allowed AI to turbocharge the field of affiliate marketing with solutions like Affise (27) that can help with better targeting, as shown in [Figure 12.12](#):



*Figure 12.12: Affise targeting (28).*

Given the magnitude of brands offering affiliate programs, those looking to manage their affiliate networks can use tools like Voluum (29), a multiple campaigns tracker that can allow you to track, manage and get real-time reports on all your affiliates, and affiliate campaigns:

Offer	Profit	ROI
+ <input type="checkbox"/> ClickBank - Global - Leptitox	\$6,855.62	234.56%
+ <input type="checkbox"/> ClickBank - Global - RocketLanguages	\$3,985.50	370.20%
<input type="checkbox"/> ClickBank - Global - Mobile 	\$2,355.32	210.25%
- <input type="checkbox"/> ClickBank - Global - LongTailPro	\$1,255.18	60.23%
+ <input type="checkbox"/> ClickBank - Global - MI40	\$2,955.80	560.20%

*Figure 12.13: Voluum tracker (30).*

## 12.4 Conclusion

Brand engagement is about the first meeting between a brand and its potential customer. This can be in direct or indirect ways, both facilitated by the company through its choice of channels or offers that incite and enable customers to come say hello. The latter requires crisp targeting as no brand wants to waste its precious time and resources on engaging with those who are not going to turn into happy customers. But if past homework was done well, the organization's job is to time and place itself to be present with the right offer when the customer is looking for its solution.

Channel marketing deals with leveraging channels (company-owned or partner-owned) to enhance reach and conversion. Partners are important because a brand cannot be everywhere at the right time on its own. It is also helpful in opening up a new group of target customers to tap into by leveraging certain situations or partners that already have these customers available. The choice of channel partners is a creative affair and can be determined by the location, type and mode of product/service offering, complementarity (of the offering, business, customers or goals), the target customer group, non-target customer group with collateral benefits, business vision or growth objectives, and the assets available to the company.

Affiliate marketing is another branch of marketing that allows brands to leverage affiliate partners who can refer potential customers to the brand and get rewarded based on their performance. This helps manage costs but risks opening the brand perception and credibility to how well they are upheld by the third-party affiliates.

Direct engagement is generally executed through email lists and brand activations in events, tradeshows, sponsorship drives, and so on. Each of these allow a company to control the terms of engagement and the brand perception, but it limits its reach. Nonetheless, it also allows a company direct access to customer and market data, which can prove valuable.

Remember the discussion on surveys and focus groups! Through the course of her many interactions with the customers, existing and potential, Una now has a clear question to answer through these exercises. As we approach the stage of Brand Receptivity, Una is about to find what the owner of the brand 'Princi' realized early as he spawned his delicious bakery chain on the streets of Milan. But before we get into that, in order to cater to and leverage Una's growing band of B2C customers in a better way, we still have to build her B2B customer base further. Let us look at some specific selling strategies in the next chapter.

## Questions

1. \_\_\_\_\_ and credibility may help the customers develop an intention to buy Una's bread.
2. \_\_\_\_\_ is where Una allows interested people to interact with the brand and its offering.
3. Sales come only after the brand engagement stage. Is this statement true or false?
4. What are the benefits of direct engagement initiatives?
  - a. They help a brand control its perception and credibility better
  - b. They help a brand expand its reach as far as it would like to.
  - c. They help a brand better ensure that it only engages with target customers
  - d. They help a brand get first-hand data on its market and target customers.



5. AI is starting to enable marketers to apply the concepts of micro-targeting and personalization used in account-based marketing, at an individual level as well. Is this statement true or false?
6. An example of indirect engagement can include those who sign up for a Una's online baking classes, register for its course or visit its store. Is this statement true or false?
7. Which of the following are factors that can help select channel partners:
  - a. Business or customer location
  - b. Type of offering
  - c. Complementarity
  - d. Collateral benefits
  - e. Business objectives
  - f. Company assets
8. Most channel partnerships are a result of gradual relationship building, and every component of business is potentially an asset that can be leveraged through a partner. Is this statement true or false?
9. Affiliate marketing combines several branches of marketing. It is a type of \_\_\_\_\_ that works on the principle of \_\_\_\_\_ and \_\_\_\_\_ operates as per the rules of \_\_\_\_\_.
10. The risk with affiliate marketing is that affiliates can dilute the brand perception and credibility. Is this statement true or false?

## Answers

1. Positive perception
2. Brand engagement
3. False

Sales can happen even during the brand engagement stage. In fact, a lot of times, that is the objective, as in the case of ecommerce players like Amazon.

4. A, C, and D
5. True

6. False

These are examples of direct engagement.

7. All the options

8. True

9. Channel marketing, Referral marketing, Performance Marketing

10. True

# **CHAPTER 13**

## **Selling Strategies**

Each customer goes through the brand journey at a different pace and that often means that we need to modify our selling strategies to cater to the stage they are at in this journey. Of course, that depends on the nature of the customer and the product as well. Often, the selling is consultative in nature, or at least requires prolonged deliberations and ensuing conversations between the buyer and the seller. This chapter looks at how sales work in the modern era and what's different now.

### **Structure**

In this chapter, we will discuss the following topics:

- Consultative selling
  - Inbound and Outbound
- Conversational approach in sales
- Information gathering in sales

### **Objectives**

This chapter takes a momentary break from marketing to dive into the world of selling, as is necessitated particularly by Una's B2B business. By the end of this chapter, you will be able to understand the typical sales reach out approaches and their issues in the modern day, learn the components to keep in mind in a direct sales strategy, identify the objectives of a sales conversation, understand the importance of data in sales and how to find that data, and identify technology that can help make sales processes easier.

### **13.1 Consultative selling**

The process of initiating and closing a sales deal is called a sales cycle. Lengthy sales cycles are mostly the domain of B2B sales, though there are exceptions as B2B and B2C selling (and customers) can often mimic each other. Take the example of Zapier, an integration software that helps users connect two apps that may otherwise not be synced with each other. Its function is pretty straightforward, as is the pricing. So, many business customers looking to connect, say, a niche tool with their CRM, do not have to consult the team at Zapier. Their web research lends enough clarity to make a direct purchase and use it.

Next, think about HP, a company with both business customers and individual customers buying its laptops. In fact, one person may fall in both categories for the company. Yet, it has kept the two sales cycles – B2B and B2C – distinctly separate since the former incurs a long sales cycle while the other is short and more importantly, often occurs indirectly through its partner channels in-store.

In contrast stands Vistaprint, a global digital and print provider of custom marketing materials that caters to both small businesses and individuals directly and in quick non-consultative B2C-type sales cycles. While its focus is on the former group, individuals can buy personalized coffee mugs, cards, wedding invitations, and even baby announcement materials on the company's website. At one point, Vistaprint decided to move from mass advertising and discounted upselling to targeting microbusinesses as a way to prioritize revenue per customer versus aggressive customer acquisition [\(1\)](#), a classic B2B vs. B2C differentiation. However, the company understood that its market consisted of both current and would-be entrepreneurs. That meant individuals or microbusinesses that can behave like them in purchase decisions. That is why it later launched its *ideas and advice* hub to help guide and nurture not only those looking to grow their business but also those looking to start one. [\(2\)](#).

There are also situations where individuals and businesses are both embroiled in lengthy B2B-type sales cycles. That is particularly true for car, home, or insurance sales. Each of these decisions take time and often involve lengthy episodes of research and persuasion in multiple sittings. Today, purely due to the size of these industries, most such organizations are enterprise-level - a stage at which companies are big, complex, and sophisticated enough to have different B2B and B2C selling teams (even if

they are supported by the same team in the backend) with specialized products on offer for each. But smaller businesses may certainly not have that luxury as sellers. Meanwhile, as buyers, they may at times behave like an individual customer. All these examples underscore how the lines between B2B and B2C can often blur, and why teams should always fact-check the nature of their B2B and B2C sales cycles for any exceptions.

Sales is about persuasion, something Una has been trying to achieve throughout her brand journey. Everything she has done has built up to the phase of actual purchase and conversion of a prospect to a customer. As we have learnt several times, different customers go through the brand journey at different rates. What this implies for Una is that some portion of sales can start off early, particularly for the early adopters and customers who are more receptive to her brand than others are. This allows selling to accompany the other initiatives in parallel. For Una's business though, extended sales cycles are most likely to be needed for her business customers as they would require more conversational and consultative deliberations on Una's proposition.

Selling strategies are required also on the personal front. For example, the details we discuss next can inform Una's descriptive message that accompanies her online course since she may not have a chance to talk to her students before they enroll. A more pertinent situation would be the hiring cycles that most of us have experienced in our careers, where we are likely to engage in detailed discussions with the recruiter. How a candidate guides that conversation can easily determine the odds of her getting hired.

Unlike most individual customers, most business customers are different in that:

- They do not make a purchase decision in one setting (although there are exceptions for both, as we saw earlier).
- There is usually more than one person involved in the decision making.
- The unmet need being catered to has to translate into a measurable business impact and **return on investment (ROI)**.
- Despite the ideal product being offered to a company in need of it, a deal may go south due to operational or other reasons, such as a lack of budget in the current quarter, other ongoing contracts, and so on.

- Business customers will take longer to close and will require more service, but they are likely to lend more sustained cash flow.

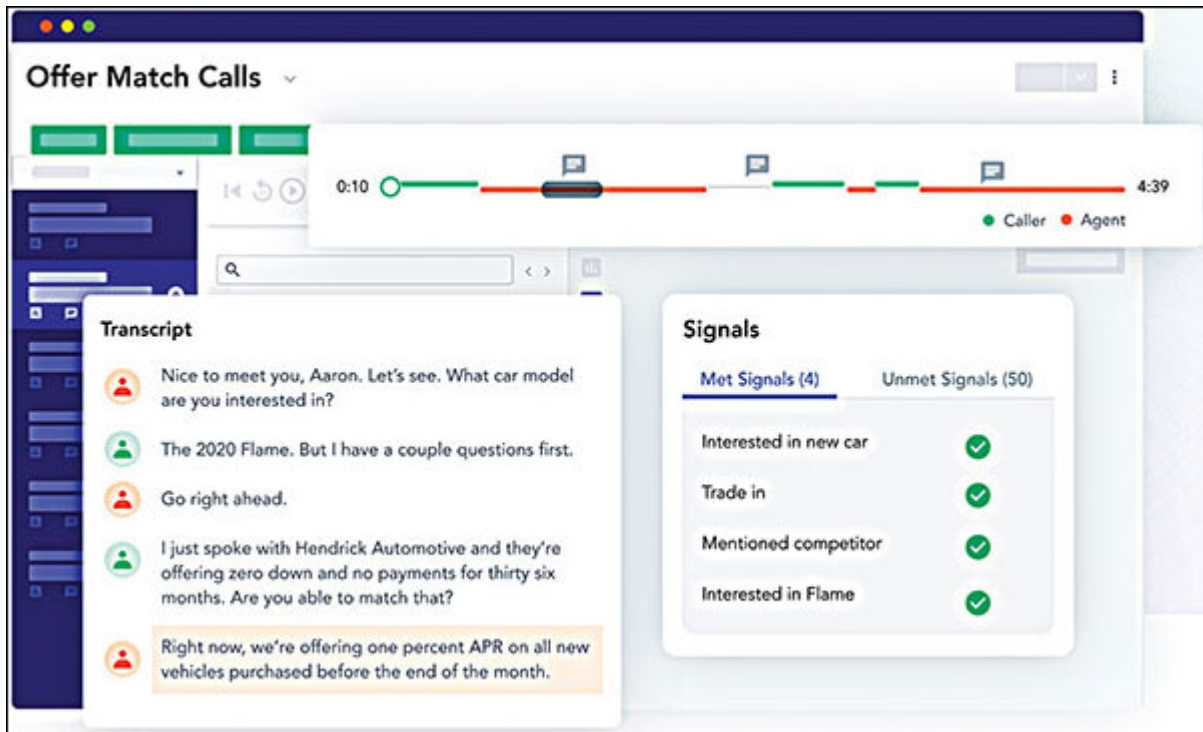
There are two ways for Una to initiate sales discussions:

- Inbound requests
- Self-initiated outbound sales reach outs

Incoming requests utilize the same setup Una has for individual customers - the website, the vertical aggregators, and so on. Only, Una will have to tweak the content to appeal to the needs of businesses requiring her catering or supplies. It may also require Una to list her website on aggregators and channels specifically meant for B2B, if she hasn't done so already.

For example, consider the thriving influencer business on social media today. For any influencer, the revenue comes from advertisers on their channel or companies who partner with them for promotions. In either case, these businesses are not always the influencers' direct target audience; the individual followers are. And the incoming revenues depend first on the influencers' ability to tap supporting individuals, which is key to attracting paying businesses. This is a unique business model that can often require influencers in certain industries to balance their go-to-market strategy between the two groups. Some, like the sports influencer gang at Dude Perfect ([dudeperfect.com](http://dudeperfect.com)), keep their channels focused on the followers, with a way for businesses to get in touch. Meanwhile, others like the business influencer *Gary Vaynerchuk* create multiple channels – separately for business customers (VaynerX and VaynerMedia) and for personal followers ([garyvaynerchuk.com](http://garyvaynerchuk.com)).

A number of tools that can convert leads or bring them to the doorsteps of a sales professional have already been discussed under brand engagement. Zoovu (3), Apptus (4), and Five9 (5) can be added to this list. The latter lays a particular emphasis on a hybrid approach using conversational AI or agents depending on the complexity of questions and can empower the latter to win more deals by putting customer information right at the sales team's fingertips. Invoca (6) is another tool that can enable agent-led selling and provide deep insights to help marketers measure the impact of campaigns and increase conversion rates. [Figure 13.1](#) shows an example of Invoca in action, with the call behavior and buying signals tracked for better review:



*Figure 13.1: Invoca in action (7)*

The choice of automation on the engagement with leads is dependent on whether and how much consultation is needed. Some tools provide the right information to an interested customer directly while the others connect the customer to the right person in the company to get it. Among this second group, they are those that an agent can handle and those that require a proper sales pursuit. And it is the latter where an inbound lead becomes similar to an outbound lead.

Outbound reach outs are a company-initiated attempt at selling to a customer. Many of the direct engagement techniques we discussed in the previous chapter could double up as outbound selling techniques. For instance, a meeting with a potential buyer may take some time to set up and require multiple emails or phone calls. If Una is using emails, she must always add a hook and a clear call-to-action in her messages. The hook can be an opening line or offer that “hooks” the recipient to read more, while the action callout clearly guides the reader on what to do next. Remember that business professionals are faced with a deluge of emails, which is why these are not necessarily the most effective channels to rely on. A response typically requires 8-10 emails, depending on how clear and catchy the emails are.

The path an outbound reach out follows is effectively the same as the sales strategy one followed after a prospect has made an inbound request and requires help making a purchase decision. As mentioned earlier, the difference is in the manner of initiating a touch point. Once in contact, Una will initiate a strategic conversation with the prospect. In baseball terms, think about it as a pitcher having thrown the ball at you, and it's now time to swing the bat. There are two components to keep in mind in a direct sales strategy:

- Conversational approach
- Information gathering

The thesis behind these two components is simple: successful sales require gaining relevant knowledge about the prospect in order to prepare and have a tactical and persuasive conversation. How has the AI era helped and altered this? Let's find out.

## **13.2 Conversational approach in sales**

To investigate what's different in the conversational approach today, let us understand the traditional best practices that apply to it. Once an in-person meeting or call is set up with the prospect, the objective of a sales conversation has traditionally been threefold:

- To qualify our fit with the buyer
- To uncover the hidden problem or desire the buyer would like to fulfil
- To persuade the buyer that our product or service can fulfil it best

In other words, Una's conversational approach has to be able to discover the client's hidden, unmet need and guide him to realize the need for her product to address it. The central problem here is that clients rarely disclose their innate problems, and especially not to someone they don't know well. This problem is historical and pertains to human nature, but is being addressed more and more by AI, given its ability to tap into our behavioral patterns. The challenge is that it's more effective in B2C where data is more easily available, than in B2B. That is why in-person conversations become important.



There have been several different approaches sellers have taken to-date. *Matthew Dixon*, in his 2011 book *'The Challenger Sale'* (8), advocated for a direct, unapologetic sales style where sellers carry deep knowledge of the customer's business and take control of the selling conversation. He contrasted such sellers to the other four types: the hard worker, the lone wolf, the relationship builder, and the problem solver.

Other methods such as 'Conceptual', 'Consultative', or 'SPIN' selling have banked more on the last two selling styles above. In these conversations, the seller typically tries to get the buyer comfortable and positions herself as a consultant or problem solver. The primary goal is to gather information, validate the sales opportunity, and help the buyer realize the value of the solution being offered. For instance, SPIN selling channels the discussion towards helping the buyer get to the true latent problem and then realize the significance of it going unresolved. The acronym '**SPIN**' stands for **Situation, Problem, Implication, and Need-Payoff**, which reflects the order of questioning and conversational flow.

'Sandler' and 'Customer-centric' selling approaches follow a similar logic, but while the former is more relationship-focused in its style, the latter is more solution-focused.

'SNAP' selling stands for 'S'imple, I'n'valuable, 'A'lign and 'P'riority, and was produced by *Jill Konrath* in 2012. It tends to be more flexible in its approach based on how the conversation is going because its priority is to make the buyer feel comfortable by staying clear and aligned with what's important for him. At the outset, SPIN begins with the same logic but is more targeted than SNAP.

Nonetheless, as may be apparent, all conversational selling techniques are built on similar foundations of developing a relevant understanding of the customer's business and the decision maker and guiding the buyer to a 'yes'. The differences are in how direct (or flexible) one is on the topics being discussed, and where the focus is (on the relationship, solution to a problem or the offering being sold).

Let us consider Una's example. Traditionally, with the implicit need out in the open, Una's job was to help the client realize its importance. That could be achieved by questioning the client on the repercussions of the problem, which could incite the client to pause and think. This step is important, however one gets to it, because it takes the pressure of buying out of the

equation and opens the buyer's mind to prioritize solving a business problem over rejecting a sales proposition.

Let us say that a particular restaurant manager's problem is that the breads they are serving as an accompaniment are rarely being consumed by the diners but are being left broken, resulting in significant wastage and costs for the restaurant. It may appear at first that the sheer volume of breads being wasted is the main issue here, assuming that the cost of these complementary breads has been covered in the menu's pricing anyway. Since Una is not in the garbage disposal business, there is not much she can do. However, upon a bit more digging, it may turn out that wastage is not the manager's chief concern. The breads are being left uneaten because they have mostly turned stale by the time they are served, which the diners realize when they first try to break them. The breads become stale due to both their low quality and the low frequency of their supply, which forces the restaurant to buy in bulk and store the breads for longer. The implicit need now surfaces.

The manager may not have prioritized an immediate solution to the problem, but Una helps him. Upon more pondering, the manager realizes that stale breads are bad for reputation in such a high-profile restaurant. And the customers, while not saying much, are leaving smaller tips and returning less as often. A lost customer is immensely difficult to get back. In other words, the restaurant's little complimentary gesture of serving breads is fast becoming reflective of its declining quality in the minds of the customers.

This is the cue for Una to jump in with her product as a speculative alternative which is close to Una's actual offer that she is about to propose. The objective is to induce a sigh of relief from the buyer. The problem is that most buyers today are already aware of the product and have some idea of its benefits and its flaws before they come to the meeting. Nonetheless, Una's job is to help the manager internalize the impact of those benefits and figure out how tremendous a difference it can make to have a more flexible supply of superior quality bread that Una can offer. Una can now move on to fleshing out her offer for the client based on his requirements, the price, the conditions and the purchase process followed by the restaurant.

Tactical conversational approaches are essentially about listening to and understanding the customer rather than actively and blindly selling something. They can allow Una to close a deal without even having to bring out her big arsenal of personalized styling on her breads. That, of course, can give the

restaurant a significant edge and allow Una to charge a premium. Nonetheless, Una can choose to save it for the time being and instead upsell the client on that offer once her relationship is better established.

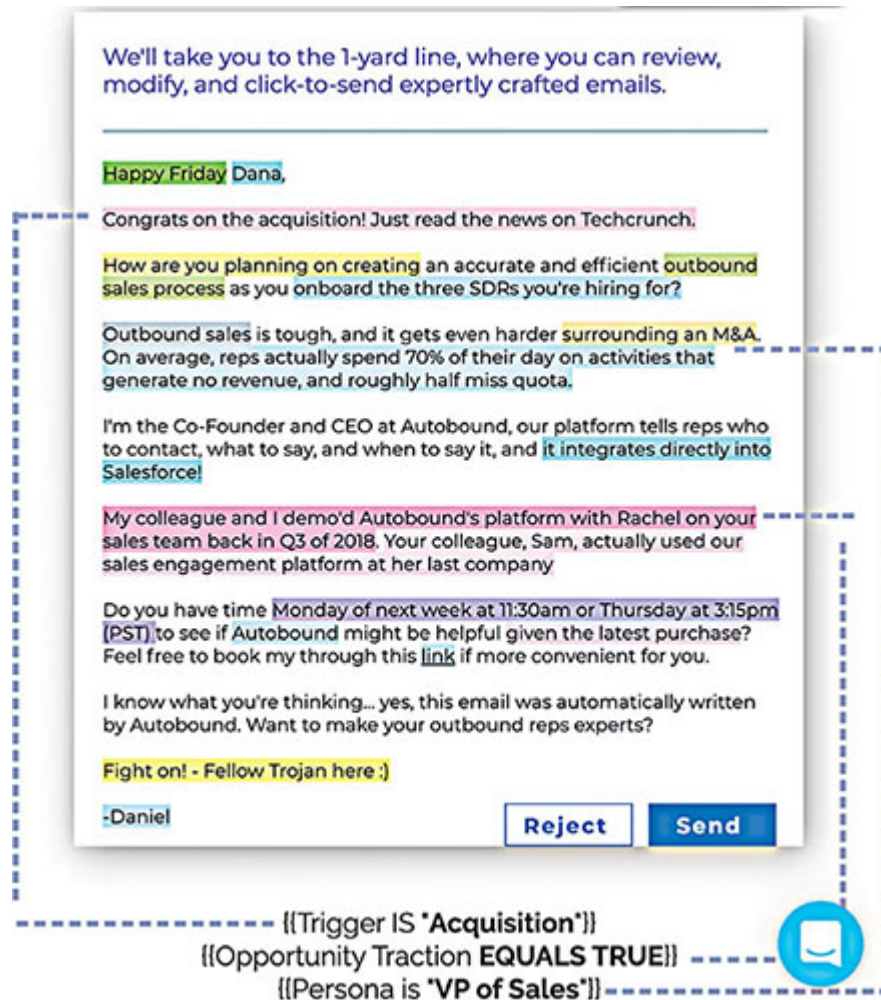
The issue with conversational selling methods today is with how much time a seller may really have with the prospect. In the case of Una, a restaurant manager with a potential issue with his existing bread supplier may not deem it important enough to seriously consider engaging an alternative supplier like Una. Even if he does, he may research online or take direct referrals to decide on a new vendor. B2B sellers today are faced with accomplishing this conversational step far more quickly to avoid a restless prospect thinking, “Get to the point!”

Customers are also tired of being sold to so much that they will even say no to good solutions that can help them, just to avoid getting into another round of sales cycle, or in case of a software, adding to their stack fatigue. It is also due to the busy, distracted nature of the customer that opportunities for a lengthy, tactical conversation are in short supply. Moreover, most customers have already done their research and half made up their minds before the first conversation. Not much point warming an impatient customer and beating about the bush then. So, should we then throw age-old proven selling techniques out of the window?

Not necessarily. Depending on the product or service, conversations do happen, and consultation is still needed, even if to validate what a customer already knows. What differs is the prior preparation and nurturing that Una has to do remotely, which is where all prior stages of her brand journey come into focus. Even at the time of the conversation, Una now has the luxury of advanced tools at her disposal which she can use to gain an upper hand. Most of them deal with information gathering to prepare for an upcoming or even an ongoing sales cycle. All this is where technology comes into play.

### **13.2.1 Technology-led conversational selling**

Let’s imagine a typical modern-day conversational selling system. We begin with Autobound (9) which helps Una personalize messages by saying who to contact, what to say, and when. Consider [Figure 13.2](#) where Autobound is guiding an email drafting process based on certain trigger and persona of the recipient, in order to increase its relevance and effectiveness:



*Figure 13.2: Autobound in action (10).*

At this point, Una can use x.ai (11), an AI powered assistant that can help her team speed up the process of setting up meetings. Once connected to her calendar, the tool coordinates with everyone to select mutually preferred times and sets up the meetings:

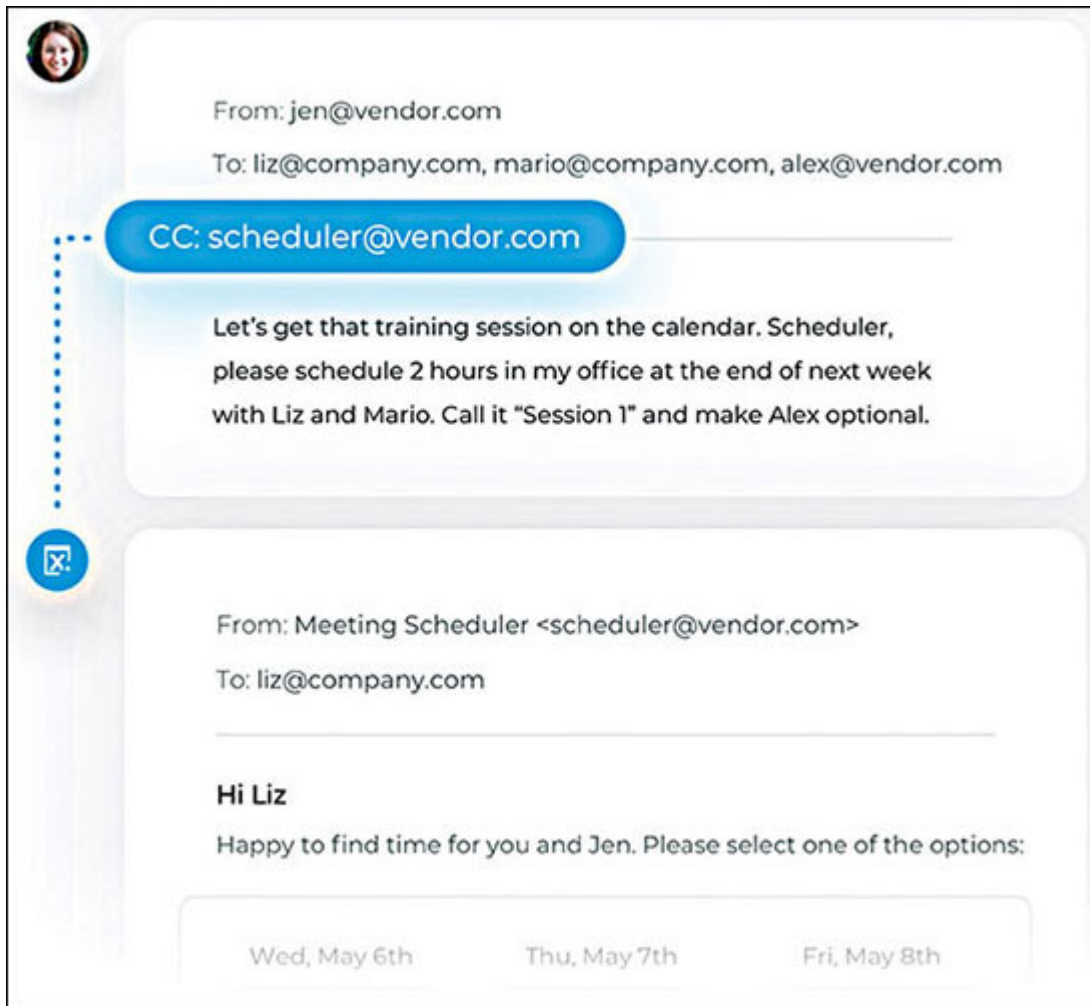
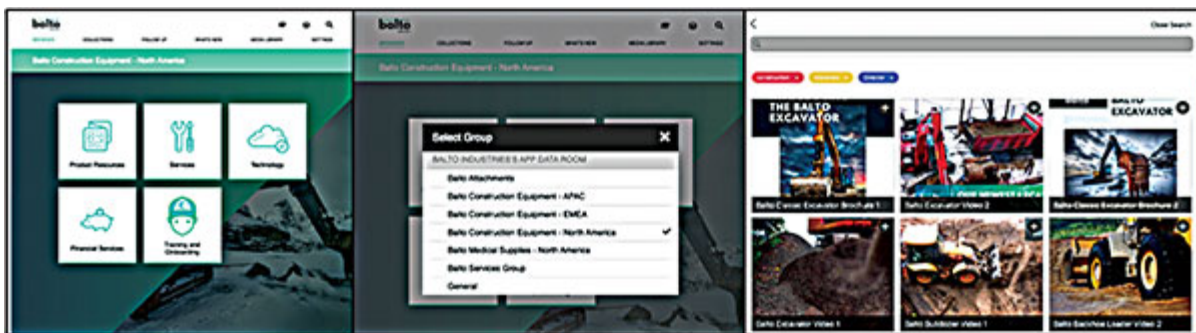


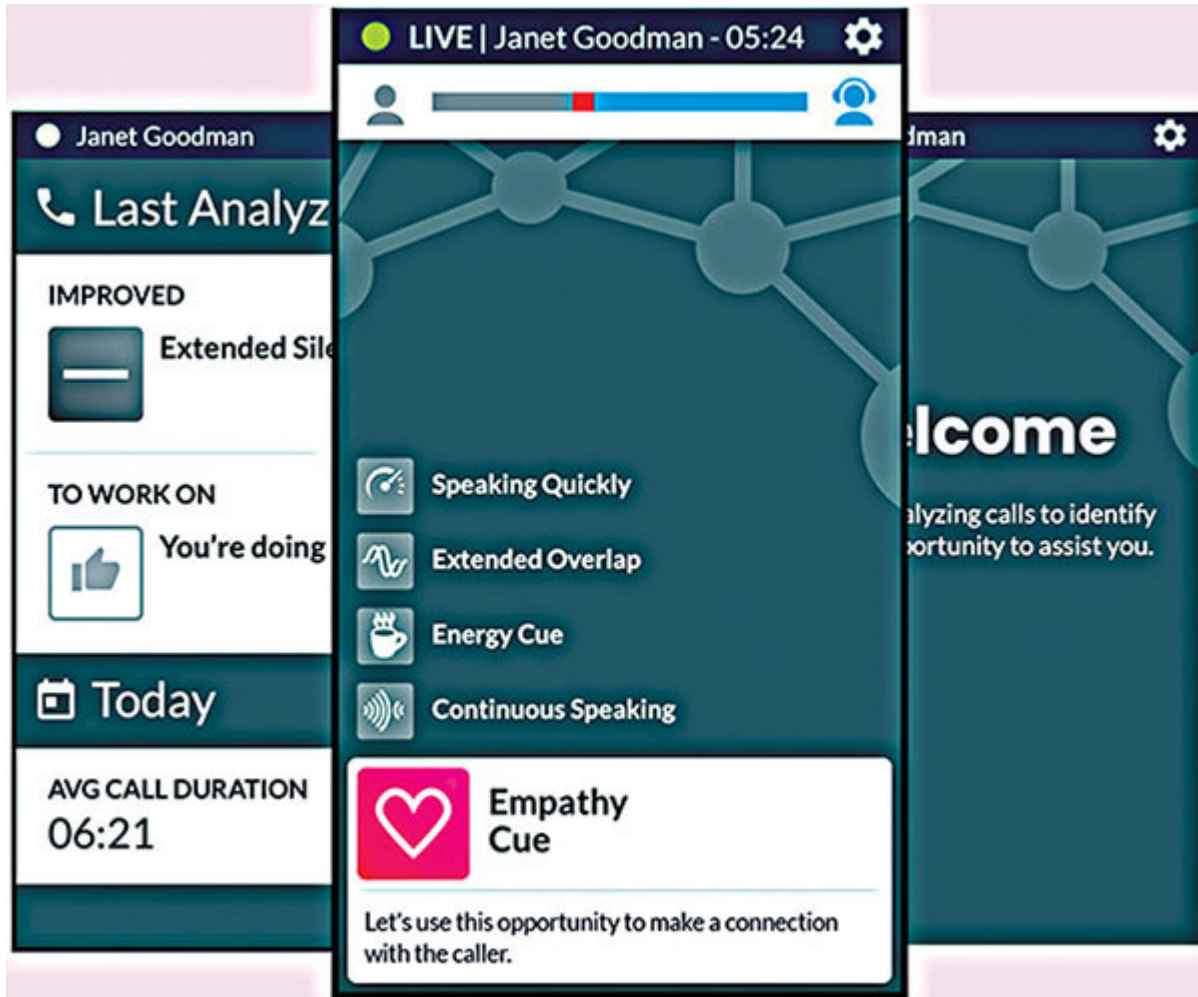
Figure 13.3: x.ai in action (12)

Before the actual meeting, Modus (13) can help Una optimize content to get specific details for the kind of opportunity she is engaged in. Figure 13.4 shows three sample screens from Modus that can help a rep get to the content she needs to provide relevant information in a sales call based on the topic and her permissions in the organization:



*Figure 13.4: Modus in action (14).*

In the actual meeting, Cogito (15) can provide live guidance on sales conversations based on emotional intelligence and human signals:



*Figure 13.5: Cogito in action (16).*

Dooly (17), meanwhile, is similar but can even tell Una which questions to ask or stories to tell, based on real-time conversational analysis:

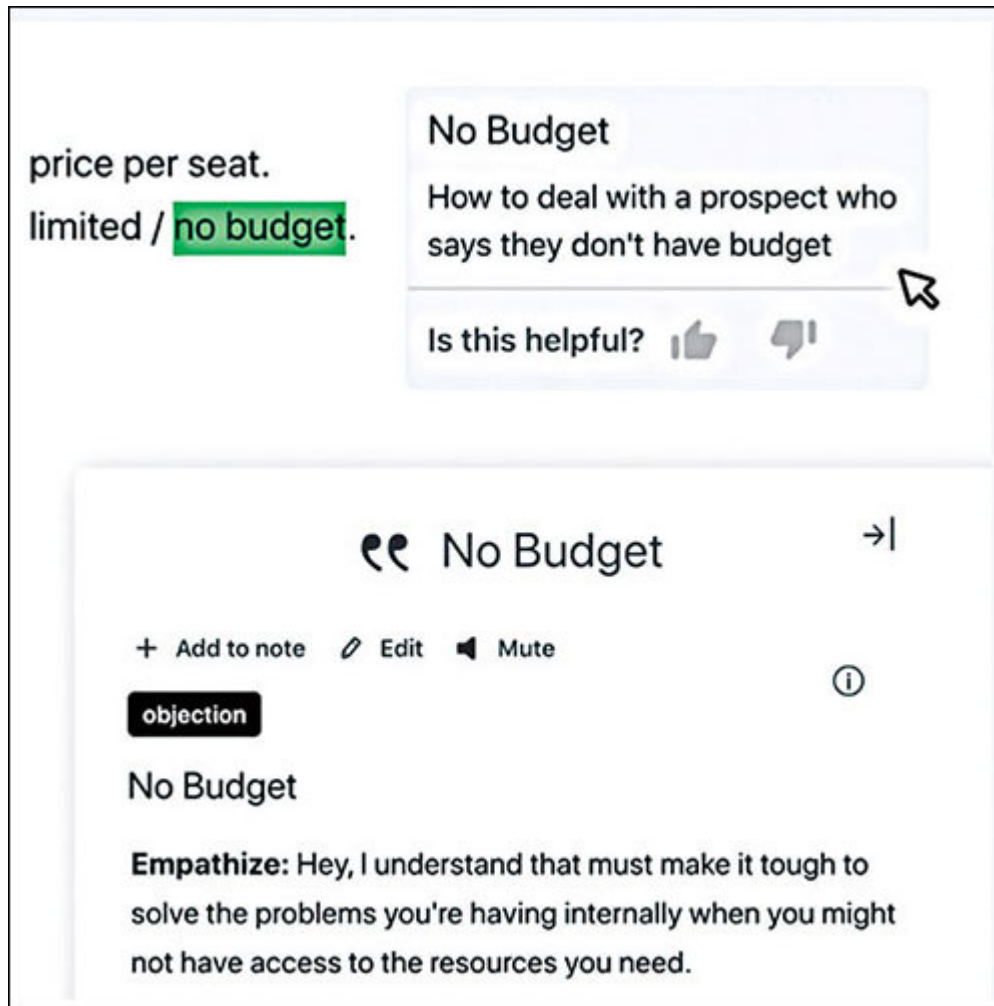
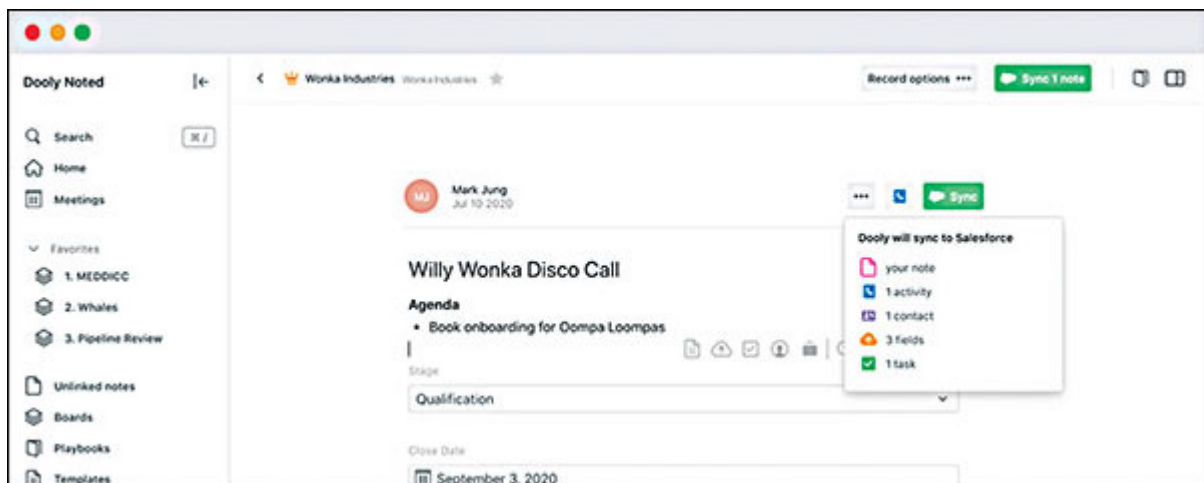


Figure 13.6: Dooly in action (18)

Dooly can also take notes from the meeting and sync all this information directly with Salesforce CRM, as shown in [Figure 13.7](#):



*Figure 13.7: Dooly's Salesforce sync in action (19).*

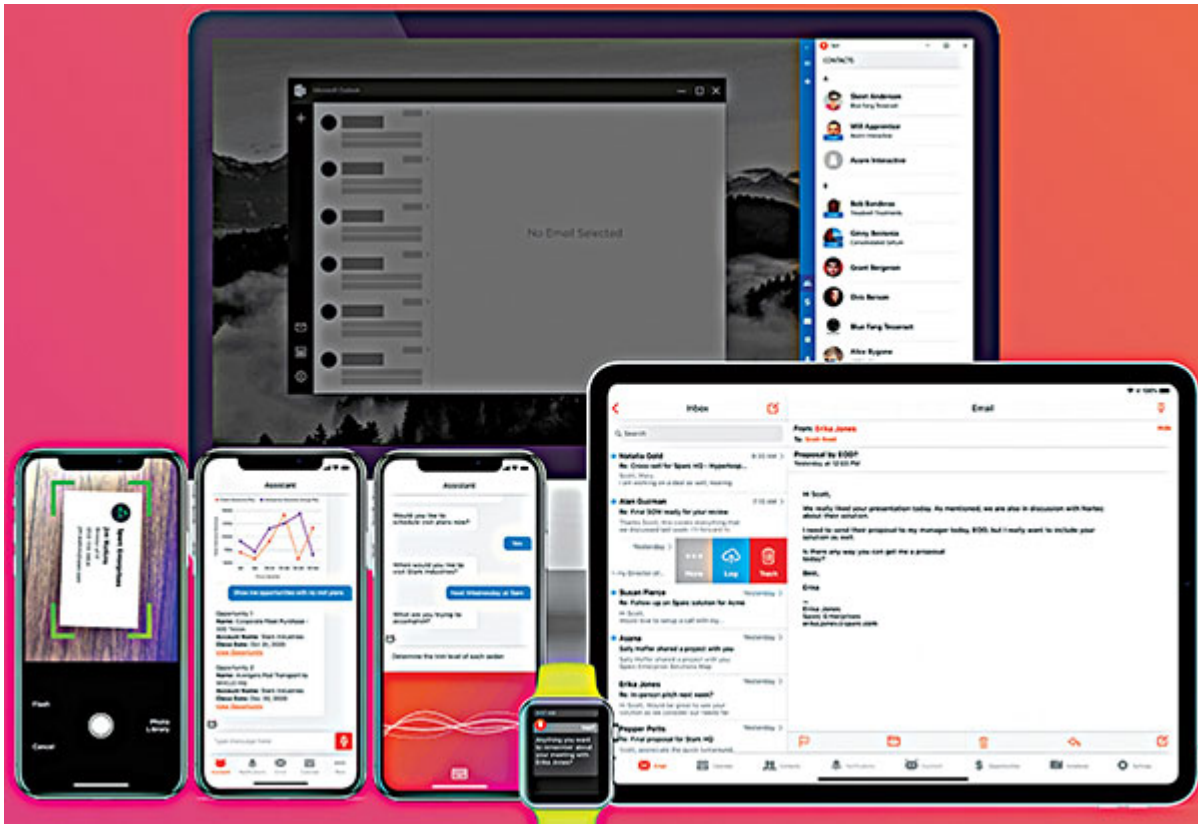
We can start to see certain overlaps between tools that may both be needed for adjacent functionalities. And that is where the risks of stack fatigue begin to rise. One way to address it is to bank on a breed of all-rounders like Tact.ai (20), which can initiate and engage in conversations, gets insights, and even update the CRM from a single platform, as shown in their representation in [Figure 13.8](#):



*Figure 13.8: Screenshot of the Tact platform (21).*

It can even allow informational exchange and cross-selling across organizations or teams, across devices, across data sources, and across customers for a sales rep to close more business seamlessly, as shown in their representation in [Figure 13.9](#):





*Figure 13.9: Tact interfacing across devices and data sources (22).*

The catch? Many such platforms, on account of their immense breadth of features, tend to be better suited to specific industries. So, it is important to consider the product fit for your use case and sales realities carefully. For now, that last bit on data alignment brings us to the crucial point of information gathering, without which consultative selling is incomplete. Let us now turn our attention to this.

### **13.3 Information gathering in sales**

Consultative selling, particularly B2B, is not simply a matter of walk-in and talk. Besides the time it takes to set an appointment, it also requires some homework. The more informed you are on your target, the better and more realistic your chances. Una needs such information also to make strategic business decisions. For instance, as an evolved business, if Una decides to invest in another store, she will first need an accurate assessment or forecast of how much revenue she can expect in this month, quarter or year. That accuracy too depends on how informed she is on her sales cycles.

Just like with conversational selling approaches, information gathering also enjoys certain established best practices. Some of these methodologies include **PTC (Path To Closure)**, **NEAT (Need, Economic Impact, Access to Authority and Timeline)** and **MEDDIC (Metrics, Economic Buyer, Decision Criteria, Decision Process, Identify Pain and Champion)**.

These methodologies can be employed partly before or during the selling conversation, but they guide the seller on the information that needs to be gathered to qualify a buyer as well as the odds of closing a deal. They, therefore, directly reflect how much Una can expect in revenue on the B2B side.

These preparative selling methodologies fundamentally revolve around understanding your buyer. The first step is to determine fit. There are several things Una must know both before and after her first sales meeting. The first crucial set of questions corresponds to Una's **qualification criteria**. Given her product positioning, resources and operational limits, she knows she cannot supply breads before a certain hour of the day, cannot deliver them beyond a certain distance, cannot sell to a place that serves a certain cuisine and does not serve her variety of breads, or cannot partner with restaurants that cater to a completely different group than her target audience. So, she would need to go through the related questions first to ensure that the manager she is talking to is indeed her target buyer.

Depending on the industry or product/service type, there may be other basic questions that may come into play. These include:

- Who is the real buyer or decision maker on the purchase?
- Is there a budget allocated for this purchase? Who controls it?
- Is there a deadline on the purchase decision?
- Who has the legal signing authority?
- Who are the other key stakeholders?
- What are the restaurant's vendor verification requirements?
- What is the onboarding process?

Yet another set of questions may revolve around defining Una's odds at winning a deal. These would include:

- Does she have inside support?

- Does she know who her competitors are for this client?
- Does she know her strengths and weaknesses in comparison to the competitors in the eyes of the client?
- Does the client understand her differentiation?

Not every question has to be asked up front and at the beginning. Una can spread these out over the course of the sales cycle, as some things can wait until the customer is qualified and there is real interest in Una's offer. Remember that too many questions can spoil the show. As with every other engagement, the sales discussion has to be conversational and not a questionnaire. And a quick sign of how a sales call went is simply to check who spoke more. Una's job is only to aid the conversation and to listen. The more the restaurant manager speaks, the better.

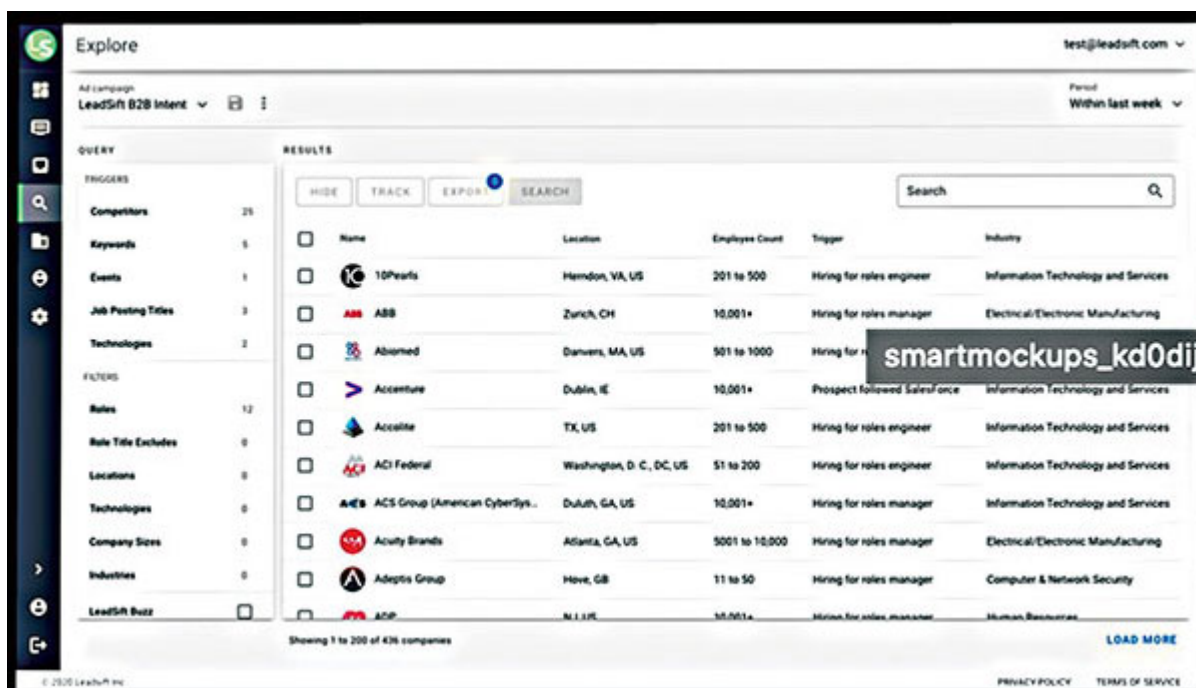
The information Una gathered over time is specific to the nature of her business and it allows her to stay on top of her sales cycle, which can stretch anywhere from a few weeks to over a year. There are a few components involved to enable this. One is the best practice of always walking away from a meeting with a clear next step, and to ensure that she follows-up with the client in a timely manner. The other has to do with sales operations, which we discussed earlier.

To reiterate, AI tools have helped sales and marketing operations folks significantly. They can help find leads, that is, potentially interested restaurants, pursue those leads, close deals, and help the customer onboard. On the marketing side, meanwhile, they can help deal with product messaging to those leads, manage the company's online and offline presence, as well as its engagements. Whether a company has multiple teams or one to manage all this, these tools can help it track and leverage all ensuing information, allowing customers to be carried from an unknown entity to a paying one without any interruption in their experience with the brand.

The punch line of AI-enabled information gathering is this: the depth of informational insight possible today allows AI to automate not only the operational but also significant chunks of sales cycles that would otherwise be executed manually.

Some of the meeting enablers we discussed earlier automate information gathering to an extent but that is generally based on the conversations with the prospect. Tools like Zoominfo [\(23\)](#) or LeadSift [\(24\)](#) can provide a holistic

set of data on the contact or her organization, which includes purchase intent signals from their online behavior. This includes information (in compliance with the privacy laws) on who was hired, who left, what topic is of interest to a particular user profile within the organization, which competitor may be engaged and what else is happening with that company, as shown in [Figure 13.10](#):



*Figure 13.10: LeadSift in action (25).*

Similar to several other solutions we have seen earlier in the book, Outreach (26) can add to the customer-data with sentiment analysis by assessing replies to emails. The immediate challenge with all this data is to bring it all in one place for the users to see the full picture and make sense of it. Ideally, everything should come into the CRM, as discussed earlier. However, when the CRM ends up being another disconnected tool with rich data, solutions like CaliberMind (27) can help do the job.

Data assimilation is needed because modern-era technologies use it all to predict the odds of a sales deal closing and to forecast revenue for sales teams. Knowledge of the former is essential for Una to understand which prospects to focus her limited time on, while knowledge of the latter is essential to help her estimate the cash flow and make key strategic business

decisions. Most of this information is based on the data found in the CRM but some also look at external signals.

The forecasting and predictive analytics market for sales has flooded in recent times, just the way the CRM market had several years back. These players are now evolving their technology with prescriptive analytics, which explains why a deal is likely to be won or lost, thereby allowing corrective actions to be taken. SalesChoice (28), People.ai (29), and Collective[i] (30) are few examples. In everyday case, the amount and quality of historical data in the CRM is crucial for accurate insights, as is the consideration of both qualitative and quantitative factors, workflow optimization for better productivity, and crucially, a clear and transparent mechanism to not only explain the rationale behind AI's predictions but also an audit mechanism on their accuracy. [Figure 13.11](#) shows a partial view of how SalesChoice openly shows how accurate its predictions on deals being won or lost were, once they have reached a definitive outcome. Such a feature not only keeps the company and its clients up-to-date with how well the AI model is working but also invokes trust in AI among the sales reps:



*Figure 13.11: SalesChoice's Accuracy tracker (31)*

Given the breadth of use cases that can aid a successful B2B sale, this space is likely to see a fair amount of specialization or consolidation among the vendors in the coming years.

## **13.4 Conclusion**

Sales is a broad enough domain to command books of its own. However, in its aggressive pursuit by teams and the persistent rift between marketing and sales, organizations can often forget that they are two co-dependent peas in the same pod of a brand journey. Sales can inadvertently begin very early on

in the journey, thanks to eager early adopters. It can be short and fully automated with AI as in B2C settings generally, and even in some B2B settings. However, it is the more consultative sales involving deliberation on part of the customer and persuasion on part of the buyer that experiences longer sales cycles. But while these cannot be fully automated, a significant chunk of the process can be handled by AI with varying degrees of success.

Consultative selling can be initiated either by inbound or outbound techniques. The former deals with incoming requests from prospects looking for your offering, while the latter involves you reaching out to the prospect. In either case, once a contact is made, the sales technique is similar. It involves one or more rounds of tactical conversations and sufficient prior preparation by gathering information on the prospect.

The conversational approach involves nurturing and guiding the prospect through a discussion. It can either be direct, consultative or problem solving in nature – either with a focus on building the relationship or presenting a solution. However, in the modern era of distracted and busy customers, it is easier said than done. This is because prospects today meet you halfway, sometimes even further, and want to get right down to it. Nonetheless, the tenets of a persuasive conversation still apply. What sellers need, however, is robust preparation with advanced insights to allow intelligent selling. AI tools help sellers remain one step ahead of the buyer by providing such information.

Traditional information gathering involves the sellers finding out more about the buyer and his company, the budget owner, signing authority, competitors in the fray, the intended timeline and purchase cycles, existing contracts, influencers, and the buyer's understanding of the seller's positioning and value. Tools today help gain more behavioral insights proactively, thereby enabling sellers to track their potential customers, uncover previously unknown data about them and manage relationships.

It is the deluge of capable AI tools and nature of the modern sales cycle that leads us to deduce certain roles in sales as being at risk of being fully automated, as we will see in the final chapter. Of course, that depends on the product and the customer – some require more consultation than others. But regardless of the automation levels, consultation becomes even more important once a deal is closed. In order to onboard her restaurant customers, and to invoke loyalty and high customer satisfaction from everyone, Una has

to pull up her “*customer success*” socks. The information that comes out of it is the last piece of the puzzle that Una needs to achieve brand resonance.

## Questions

1. Which of the following statements are true about B2B and B2C sales:
  - a. Most B2B purchase decisions require multiple conversations or sittings, though there can be exceptions.
  - b. B2C purchase always involves one person while B2B can involve several.
  - c. B2B sales require a more explicit focus on measurable ROI.
  - d. B2B customers allow more sustained cash flow because once a contract is signed, they will never move to a competitor during the duration of the contract.
2. Two ways sales discussions usually get initiated are \_\_\_\_\_ and \_\_\_\_\_.
3. Consultative sales, particularly in B2B, necessitates information gathering because a deal may go south despite the best product with a most persuasive selling approach and a convinced buyer, due to operational, budgetary, or other reasons like stack fatigue. Is this statement true or false?
4. Two components involved in successful selling are \_\_\_\_\_ and \_\_\_\_\_.
5. Order the following components of conversational selling:
  - a. Discover the core issue underlying the challenge faced by the buyer.
  - b. Help the buyer realize the value of addressing the core issue.
  - c. Find the apparent pain or challenge faced by the buyer.
  - d. Warm the buyer with neutral or qualifying questions.
6. Tactical conversational approaches are essentially about listening to and understanding the customer rather than actively and blindly selling something. Is this statement true or false?

7. The modern era has given us innovative tools to aid tactical and productive conversations but also made the buyer more impatient and averse to any sales discussion. Is this statement true or false?
8. Information gathering is important in sales because:
  - a. It helps qualify fit with the buyer.
  - b. It helps make selling more organized and planned.
  - c. It makes the sales conversations more effective.
  - d. It helps make more accurate assessments on the odds of winning a deal.
9. First among the type of information a seller needs to gather are those that help her decide whether a buyer meets the \_\_\_\_\_. The buyers' willingness to purchase, the timing, and any barriers in the way that can help predict the odds of winning the deal, come second.
10. Already, AI tools can gather external market and company information on a prospect, analyze it, predict sales outcomes, aid the sales conversation and in some simpler and shorter sales cycles, even carry out the conversation on its own. Is this statement true or false?

## Answers

1. A and C  
B2C purchase, as in case of a home or car, can involve multiple individuals in a household, while simpler and well-known productivity tools may be decided instantly by a professional user. Also, while B2B contracts are trickier to break, bad vendor experience, leadership directive or significant change in business (such as an acquisition) can result in that happening in favor of a competitor.
2. Inbound requests and Outbound reach outs
3. True
4. Conversational approach, Information gathering
5.  $D > C > A > B$
6. True
7. True



8. A, B, C, and D
9. Qualification criteria
10. True

## SECTION 4

### Turning the Customers into Fans

There is a reason why one of the first things investors look at is the monthly or annual recurring revenue, and the customer churn rate, in order to decide the financial valuation of a company. Gaining customers is not of much value unless the product and service are good enough to retain them. Market valuation is one of the big reasons companies have become focused on after-sales support and ensuring a great customer experience. For those with an eye on brand journey, customer success is also essential to get to the pinnacle of their brand equity. For, it is this stage that establishes loyalty and eventually, resonance. In fact, even for those who are not too concerned with resonance, happy customers can mean new customer referrals. In this final section of the book, we will cover all these aspects, with both conventional norms and strategies for the modern era.

The final chapter of this book will round up all that information and shift gears to a more pressing personal concern. Learning how to execute marketing, sales, and customer success is one thing. But it is not of much use if AI becomes smart enough to do all that for us. How do we determine whether a particular job is at threat due to AI, and how do we prepare for it? That will be the final quest of our journey.

In this section, we will:

- Learn how you can help your customer realize the complete value of your brand and its product/service.
- Understand how to make your customer not just feel heard but appreciated.
- Learn the art of creating “*Resonance*” that is, creating a personal and more intimate connection between your brand and its customers.
- Learn how AI is impacting jobs, which ones it can replace, and how to prepare for it.

The chapters included are:

- [Chapter 14: Customer Onboarding](#)
- [Chapter 15: Brand Receptivity](#)
- [Chapter 16: Brand Resonance](#)
- [Chapter 17: How to Prepare for the AI Era](#)

# CHAPTER 14

## Customer Onboarding

You've nailed it! The long chase behind that lead has finally borne fruit and has converted to a sale. Now, it's time to nurture that customer into a loyal fan! Remember all the pain that your parents or mentors took to guide you step by step? It's a journey of that nature but one to bear great results if done correctly. Before generating loyalty, you have to drive adoption of your product or services by the customer. That is the job of customer onboarding. It is also a fertile ground for gathering rich data on actual customers and their use of one's product. In this chapter, we look at the how's and when's of this process.

### Structure

In this chapter, we will discuss the following topics:

- Importance of onboarding
- Customer onboarding journey
  - Designing a customer discovery session
  - Onboarding process and milestones tracking
- Consumer neuroscience
- Referral marketing

### Objectives

This chapter guides you on how you can help your customers settle down with sample processes that you can evolve to suit your organization and enable further growth with techniques like neuroscience. By the end of this chapter, you will be able to learn how to understand your customers' desired and actual outcomes of using her products or services, help your customers better grasp your brand's value and ensure a successful onboarding experience, and understand how referral marketing is initiated.

## 14.1 Importance of onboarding

On the face of it, onboarding looks like the simplest of all steps we have seen so far and will see through the rest of the brand journey. The rules and conditions of this function are already set. The customer is now confirmed, and all an onboarding team has to do is guide them on how to use the product or service, and answer any questions, before the more delicate job of nurturing them to loyalty begins. So, when a Swedish company chose this straightforward step to bring out the best in innovation, no one could have predicted it. That company was Ikea and its genius redefined retail in the modern era globally.

Ikea is the global furniture retail giant, best known for its do-it-yourself (DIY) products. The problem facing companies like Ikea was a classic one: how to ensure quality products at scale while keeping prices low for customers. If you recall from the early stages of Una's brand journey, price wars are generally a one-way street where you have to keep reducing costs until it is no longer sustainable. Ikea found a way around it; thanks to two cultural norms: the customer's willingness to be self-reliant and build their own stuff, and the company's focus on simplicity and the quality of product. Ikea needed to only supply parts that met these criteria, and the customers could assemble them on their own, allowing the company to save on costs. The result was an ability to sell furniture at scale at a low price worldwide.

Ikea's innovation worked because it paid attention to the customer onboarding aspect of the business. In order to drive adoption, the company had to ensure that even those with no knowledge of hardware work and lesser physical strength could easily assemble parts of furniture. Add to it, the global nature of its business. On one hand, that meant publishing short and simple pictorial guides that were easy to interpret in any language. On the other hand, it required perfect standardization of parts for ease of guidance and use across all products. That also involved minimization of the number of parts needed and their user-friendliness in terms of surface texture, weight, recognizability, and more. By paying attention to ease of onboarding, Ikea had managed to achieve adoption with an average consumer without its customer success team having to say a word in the process.

The magnificence of Ikea's innovation is compounded by the fact that it operates in the B2C space while customer onboarding is generally the imperative in B2B selling. In either domain, helping the customer align with the product is important because new customers are generally faced with 3 questions:

- What is the value of the product purchased?
- When can they start getting that value?
- Who is responsible to ensure that value?

As obvious as these may seem to a seller, they are not so for the customer. This is because different stakeholders on the buyer's side may have come in at different points in the sales cycle and no one person may have all the information the sales team has relayed to the company. In fact, the end user of a product may be very different from the buyer. And of course, the sales person may not have gone into the finer details of product usage at all. Critical information on the process, how the product fits into the customers' plan, and who is that one person on your end that they can speak to for any queries – may all be missing.

Customer onboarding primarily serves two purposes:

- It allows you to start building a relationship with your client while you get them familiarized with the product or service they've just purchased.
- It sets the foundations for additional business on two fronts: customer referrals to other prospects, and upsell or cross-sells to the customer.

The first point is essential *en route* to loyalty building, but it is the second part that leads to more immediate benefit for the company. We will cover referrals in this chapter as some preparation is needed at the onboarding stage. As for upsells or cross-sells, we will wait until the next because the last thing you want to do is signal more expense for a customer while they are yet to properly adopt the product in question.

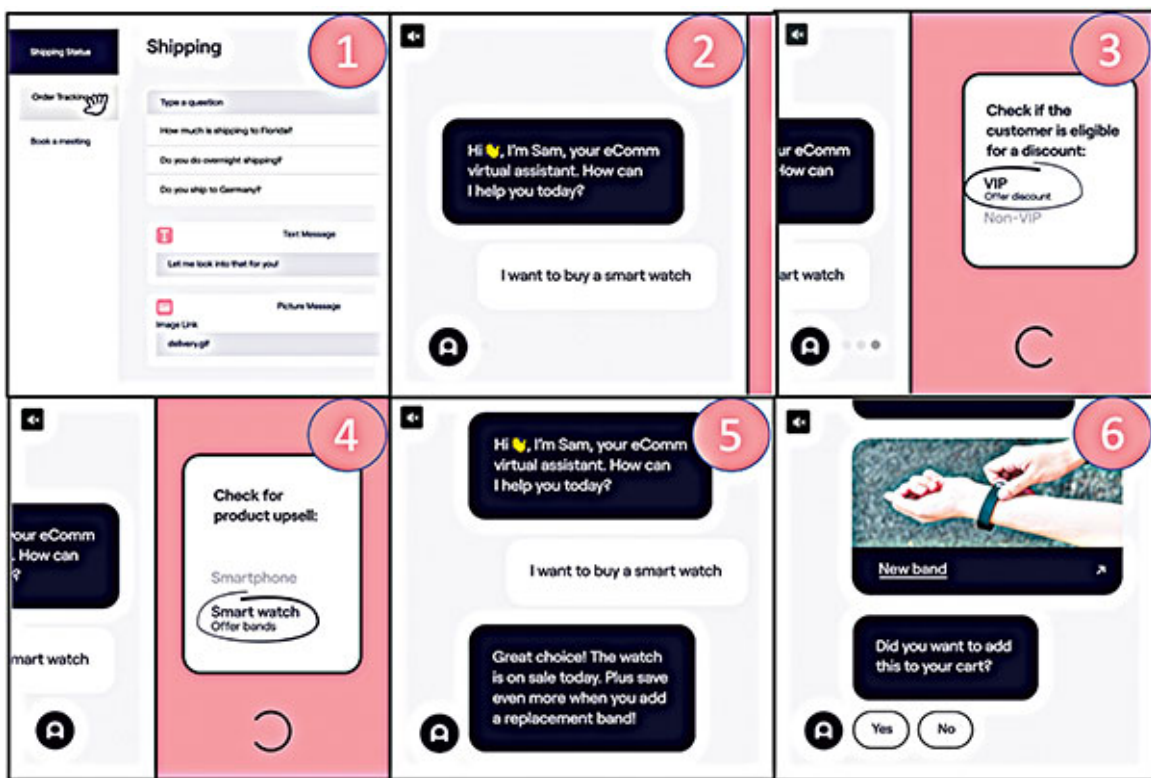
So, what does a typical onboarding cycle look like?

## **14.2 Customer onboarding journey**

In Una's case, it could be her bakery supplies. It could also be your consulting gig or services as an employee. Whatever the product or service, the onboarding step starts with getting to know why your customer chose your products or services from among all other options out there. You may be thinking, "*But our sales team already had this call with them during the customer discovery phase.*" The thing is that call probably happened days or months ago and a lot can change in that time frame. More importantly, as mentioned earlier, details can be missed or lost in communication exchange. So, **it's important to touch base and understand your client's evolving needs.**

An employee onboarding is a formalized process, but the employee can use it for an implied employer onboarding to set the stage and align expectations. The customer onboarding process can be a little less formal and a little more on the personal front, but of course, this would depend on the type of customer. For customer onboarding that does not require detailed product guidance, such as some plug-and-play solutions or ecommerce, chatbots like Ada (1) can be set up to answer questions 24/7 as a way of automating part of customer service.

Consider the set of views from Ada in [Figure 14.1](#). Image 1 shows the drag-and-drop mechanism of setting up the chatbot to address queries. It is like the website design process we discussed earlier. Images 2 through 6 reveals how Ada interacts with a retail customer, facilitates the purchase with a timely discount, and even identifies an opportunity to upsell!



*Figure 14.1: Ada in action (2).*

Let us now look at a more deliberative customer discovery process, from a business perspective for a personal or corporate brand.

### [14.2.1 Designing a customer discovery session](#)

Una can start by creating a short questionnaire with a combination of close and open-ended questions; all designed to help her understand *her client's desired and actual outcomes of using her products or services*. Going back to Una's sale of breads to restaurants who in turn serve them to their diners, she could ask the following questions to restaurant managers in order to gain insights on how she can nurture them into loyal customers:

**1. What challenge is our product/service solving for you?**

This will help you understand, in the simplest words, the pain point of your customer and how they think your product or service is going to help resolve it. It also gives you a clear idea on how to guide them in achieving their goals with your product/services.

**2. What is the reaction you are hoping to get from your diners as a result of serving them our breads?**

This kind of a question will help her understand what her client would consider as a successful outcome of buying her products.

**3. What would you say are the most high and low demanded items from your menu when it comes to pastries and baked goods?**

This will help you pre-strategize the kind of orders you can expect from your client and thus plan your resources and future cross-selling opportunities efficiently.

For larger businesses, tools like RemiAI (3) can help forecast demand and inventory needed, based on many variables – in classic AI fashion – including weather, web hits, promotions, currency rates, search marketing, display marketing, supplier behavior, and commodity prices. (4) It allows companies to automate millions of daily inventory decisions across their products and stores. In fact, it can even predict maintenance needs (5) for Una's machinery to help her predict variable costs. That complements the revenue-side optimization it provides with intelligent pricing insights. [Figure 14.2](#) shows Remi's price optimization dashboard based on forecast:



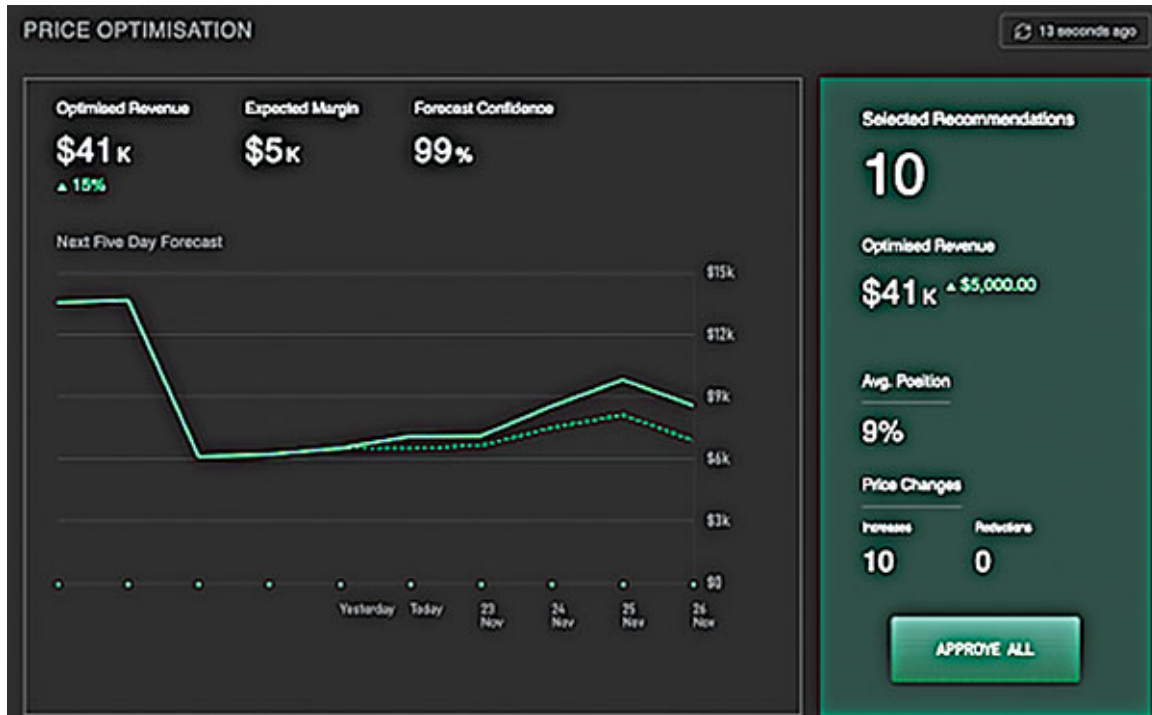


Figure 14.2: Remi's Price Optimization in action (6)

**4. How long does each batch of breads and other baked goods usually last at your restaurants before you have to order your next lot?**

With this, you can learn about your expected order time frames so you can meet and exceed expectations!

**5. How do you see this relationship evolving with time or how can I assure your loyalty?**

Being direct is not necessarily a bad thing. You will be surprised at the number of times we've asked this question and gotten an honest answer that has helped us grow client relationships.

**6. How many times would you like to hear from us?**

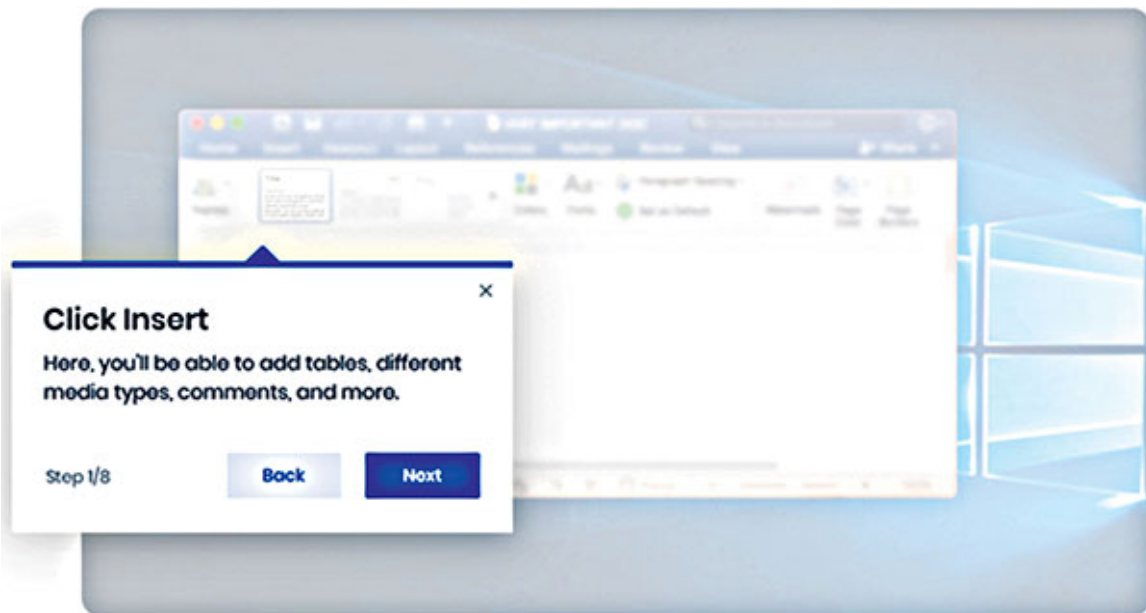
This will help you plan your touch point strategy so that you don't annoy your clients. Some would prefer to avoid too many emails/calls while others will feel like you don't care if there's not enough of those.

Our recommendation is a maximum of 10 crisp and clear questions. Feel free to reach out to us on LinkedIn or at TheUpadhyays.com if you would like more ideas.

Ok, so Una has got a set of good questions ready. Now, it's time to start interviewing her clients. The first discovery call should last her anywhere from

30 min to an hour, depending on how detailed her client responses are to her questions. In some cases, her client may not necessarily understand the value of this call and thus not be willing to do it. In such a case, we would recommend that she send them the questionnaire via email and request them to fill it out. Do whatever it takes (politely) to get answers that she needs for her going-forward strategy!

You may have come across modern-era onboarding tools in the form of “*tutorials*”, often embedded in a software when you first launch it. They are designed to guide you through some of the basic features of the product and how to use them. Una’s product is different and simpler, but for those businesses where the product needs some coaching, tools like WalkMe (7) can help by creating interactive on-screen tutorials on the website or the product itself. In the case of Una, this could even include guidance on how to choose the right breads and make an order online. [Figure 14.3](#) shows this familiar sight in action:



*Figure 14.3: WalkMe in action (8).*

Inline Manual (9), as the name suggested, does a similar job. You can segment the manual or content to show based on your user segments (a VP of sales may not use the same features in a sales software as a sales rep in her team would). You can also launch pop-up messages for users, add tooltips, track usage, automate tasks (as shown in [Figure 14.4](#)) and do a whole bunch of other things:



Figure 14.4: Automation on Inline Manual (10).

In effect, it can make Una’s onboarding completely seamless by creating interactive product guides, onboarding checklists, and just-in-time contextual help, while she controls it all from a single dashboard. A sample analytics dashboard is shown in [Figure 14.5](#):

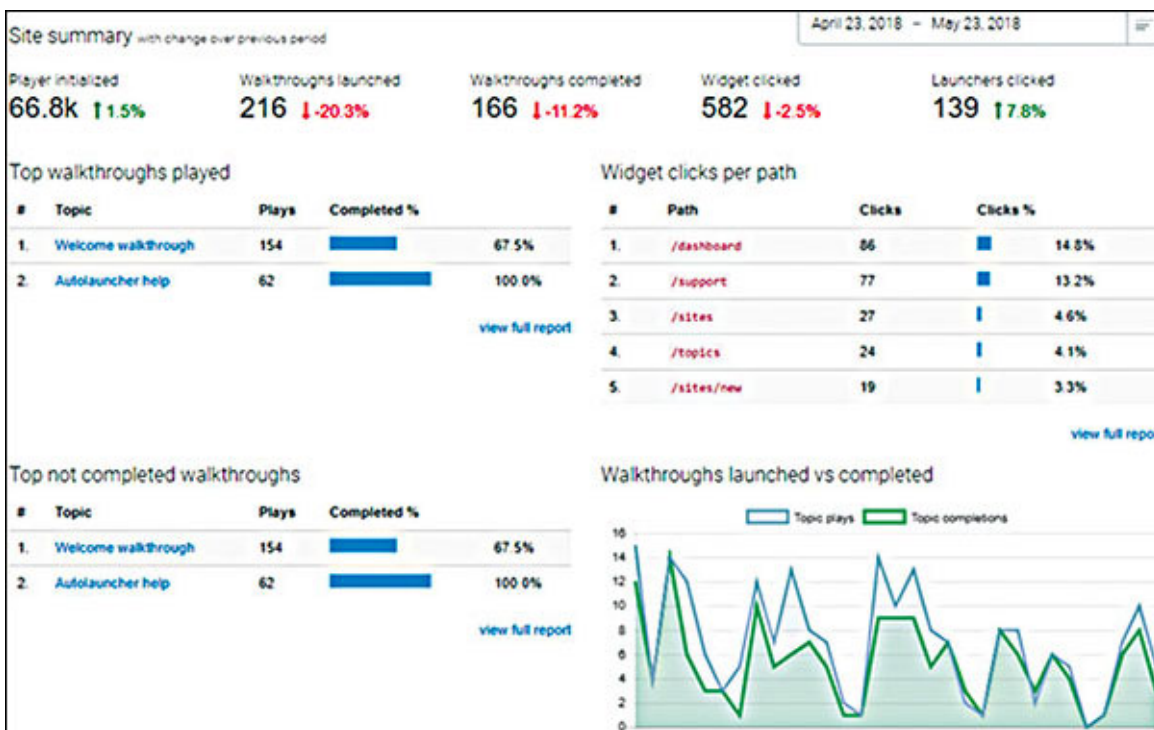


Figure 14.5: Inline Manual Analytics Dashboard (11).

## 14.2.2 Onboarding process and milestone tracking

From Una’s discovery session, she now knows what her clients’ strengths and weaknesses are along with their desired goals from opting for her products or services. She can use this valuable insight to plan out how she is going to keep them going. This stage is about setting up milestones to track their progress status and achievements. This is extremely important as it helps Una to know

when things could be falling through the cracks and to save them on time. It's also a great way to motivate her clients to stick with her. Not everything needs to be complicated though; Una's milestones can be simple and laid out as follows:

- **Milestone 1:** Discovery call set up.  
**Goal:** Highlight what the goal is for this task and why she is doing it.
- **Milestone 2:** Discovery call completed.  
**Goal:** Here, as discussed earlier, the goal is to understand what her client's ultimate successful outcome looks like from buying her product.
- **Milestone 3:** Onboarding strategy created.  
**Goal:** Based on her client discovery call, Una will create a strategy to familiarize her client with her products and processes. In the case of a SaaS product, you will want to use this milestone to plan out a phase-by-phase process of familiarizing, implementing, and training her client with her product.
- **Milestone 4:** Onboarding strategy approved.  
**Goal:** This is important. Una wants to make sure her client approves of her process. Their happiness and comfort, at each step, should be her priority.
- **Milestone 5:** Onboarding starts (This can be broken down in phases if needed).  
**Goal:** Begin the onboarding process as per the approved plan. During this stage it is very important that Una guides her clients on what the next 12 to 18 months are going to look like for them and what they can expect.
- **Milestone 6:** Onboarding completed.
- **Milestone 7:** Follow up to check client satisfaction and plan communication schedule for customer success.  
**Goal:** Una wants to use this opportunity to plan out the next steps for their communication schedule. This will help her plan out how many times she needs to be in contact with her client through their lifetime. The idea behind this schedule is to follow up with the client and check how they are doing with her product and if they need any more assistance. For example, in the case of Una, it could be that her breads are oversized for the restaurant cutlery and the customer may realize this only post activation with her.

The above approach also helps keep her client engaged. Una can do this via emails and/or calls. *Quick tip:* Keeping in touch with the client and engaging them periodically, even if for a quick catch-up is essential. Customers can be lost if Una is asleep at the wheel with no update, assuming it's a satisfied customer, while he is being poached away by a competitor.

Following is a sample of customer survey questions for *Milestone 7*:

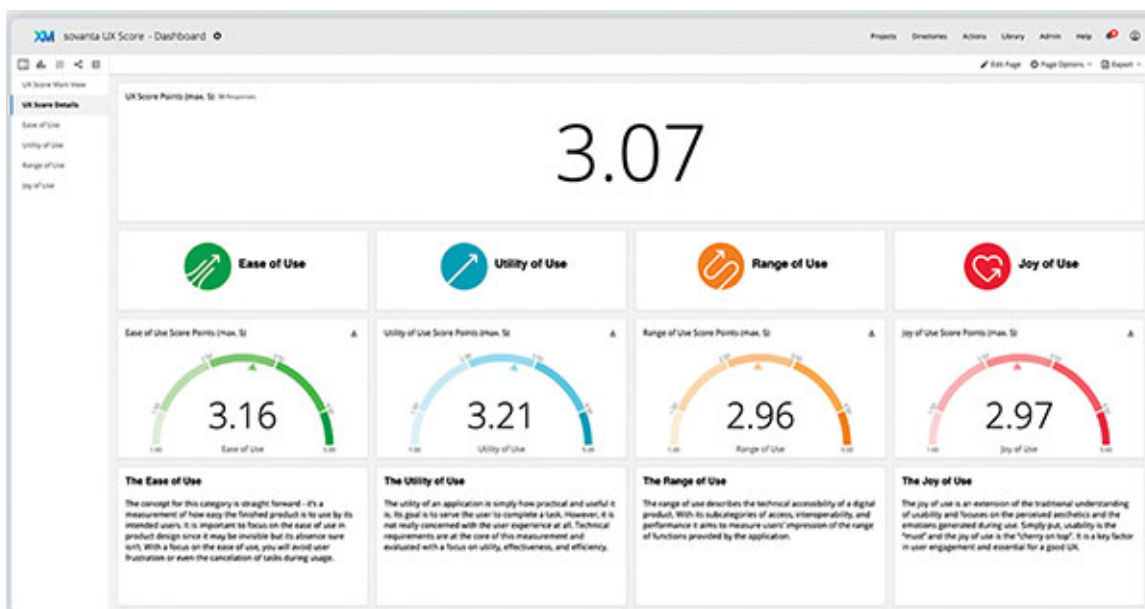
1. Name of the sales rep assigned to you for onboarding.
2. How happy are you with Una's onboarding services?  
(Extremely unhappy) 1 - 2 - 3 - 4 -5 (Extremely happy)
3. If your choice was between 1 - 2 for the above question, please specify why.
4. Was the onboarding process time efficient?  
Yes  
No (Please specify why)
5. Was the assigned representative knowledgeable about our products?  
Yes  
Maybe (Please specify why)  
No (Please specify why)
6. Was the assigned representative able to resolve all your queries about our products?  
Yes  
No (Please specify why)
7. Was the assigned representative timely when it came to responding to your calls or emails?  
Yes  
No (Please specify why)
8. How do you think we can further improve our onboarding?
9. What would you recommend we do to make your overall experience better?
10. Any other feedback?

Una would need to make sure to set a targeted date/time within which she plans to complete each milestone so as to ensure she stays on top of things in a timely

fashion. She can also integrate feedback emails, calls, or surveys into milestone 3 and in between the phases of milestone 5, in order to understand how her client feels she is doing and if they would like anything done differently.

A good idea would be to have templates in place for all communications so that there is a standardized process and all her crucial information is always passed through. But she would be wise to leave some space for personalization in these templates – she doesn't want to seem robotic. If her client starts feeling like they are part of an emailing list, it's sure to put them off!

Una can also use tools like sovanta AG (12), to leverage her surveys with richer insights on the customer experience. [Figure 14.6](#) shows the view that reveals a UX score across four parameters: ease of use, utility of use, range of use, and joy of use:



*Figure 14.6: UX scoring on SovantaAG (13).*

Keeping the scores up is not only a matter of proper customer onboarding but also the internal team's training as Una's business grows. She can use tools like MindTickle (14) which gamify the training experience and equip the teams with better customer experience handling. [Figure 14.7](#) shows the gamification and training in action:

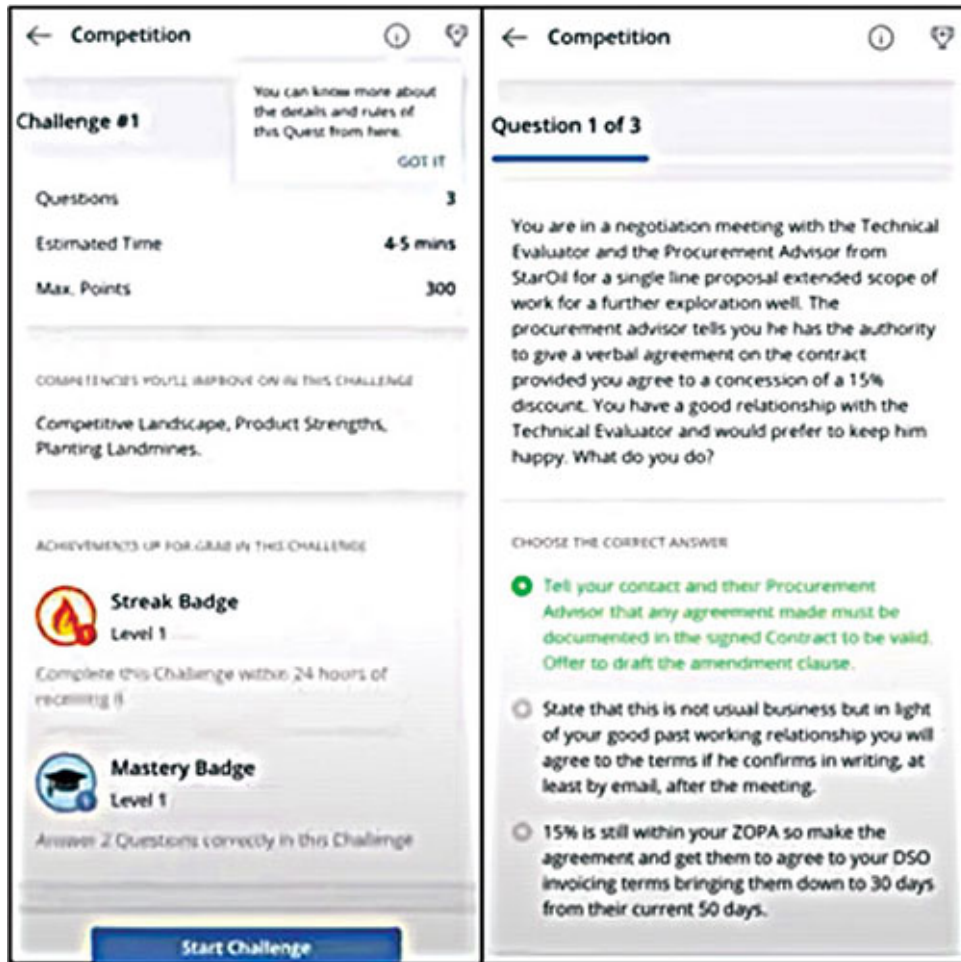


Figure 14.7: MindTickle’s employee training gamification (15).

Of course, a lot of the question handling can be automated using many of the chatbots we have seen earlier. Meanwhile, once a customer’s preferred touch point frequency and availability is known, JRNI (16) (pronounced: “journey”), a scheduling engine, can engage him online or offline, via events (such as personalized training sessions), appointment booking for specific services, and queuing while other customers are being attended to. Figure 14.8 shows these three in action:

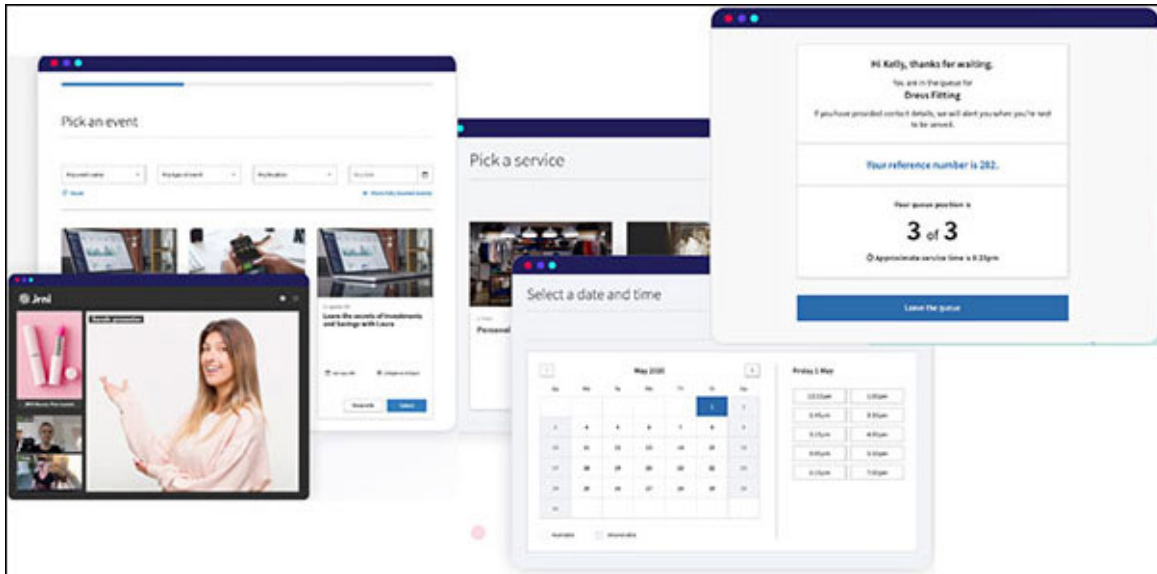


Figure 14.8: Sample views on Jrni (17).

## 14.3 Consumer neuroscience

A 2004 study by *Samuel McClure* and his fellows (18) looked at people's preferences when drinking Pepsi and Coca-Cola in two situations: without knowing which brand they were consuming and while knowing it. When they didn't know the brand people couldn't clearly tell the difference between the two drinks. In fact, Pepsi received a greater preference in some instances. The researchers found that in this blind tasting, the part of the brain that was engaged was primarily the one that deals with enjoyment (*medial prefrontal cortex*). However, once the participants knew the brand, Coke seemed to win out. Interestingly, while no significant change in the brain signals occurred in case of Pepsi, there was greater activation in the *hippocampus* and *dorsolateral prefrontal cortex* in the case of Coca-Cola. Both these regions of the brain are related to memory and can change an individual's preferences based on emotions. This showed that people often liked Coke more due to their prior experience and what they knew about the brand rather than pure taste! Coca-Cola has achieved brand resonance through memory; something we will come back to in the corresponding chapter.

The above example showcases the neurological power a strong brand commands of our conscious and unconscious brain. If asked, would any of us ever say we prefer Coca-Cola because of anything but its taste? There is often a marked difference between what consumers say and what they truly feel. Engaging with existing customers serves as a great opportunity for brands to



take the guessing out of the equation and start leading by facts on what works and what doesn't.

Consumer neuroscience combines economics, psychology, and neuroscience, which is the study of brain signals. Since marketing combines the former two, the application of neuroscience provides a significant boost to the field, allowing scientific insight into understanding consumers' behavior and their drivers – the gold standard for marketers.

Reading brain signals or tracking eye movements can allow companies to understand where consumers are focusing and how they are reacting to different situations. This is useful when deciding product placement in retail stores or its packaging so that it truly stands out among other products. It also helps decide on pricing changes and how they impact the consumer decision, if at all. As may be apparent, neuromarketing can directly inform a brand's Tier-I strategy. No surprises then that it also helps on the positioning, by revealing true customer motivations. In fact, our reaction to visual cues can directly impact our choice and make of brand elements. We looked at tools like Cortex earlier in the book but have saved this topic for the final section because of its current applicability. For all practical purposes, neuroscience studies require gadgets and willing participants, which often makes it better suited to study existing customer volunteers versus a prospect. Of course, as tools get better with time, this scenario will change.

Consumer neuroscience has been around for many years. It is behind various forms of tactical branding initiatives based on touch, odor, sound, or visual senses. Some examples include adding weight to products like a remote control because that is perceived as higher quality, adding leather fragrance to make shoes smell more authentic, or ensuring the crackling sound for better experience when a packet of chips is opened. In the case of Una, like most other bakeries, ensuring the smell of fresh bakes is passed onto the street for passers-by would be a similar decision.

Neuroscience has helped us learn just how much, and how our senses react to these different stimuli, and how that influences our perception of a brand – positively or negatively. It has also quashed many preconceived notions. One example is the quiet display of a brand name at the end of advertisements. It turns out that this common practice is not really very effective in sticking to the customer's minds if it appears in contrast to the rest of the ad. The field has also helped marketers appreciate the importance of every nanosecond and how brands can register in our unconscious mind even if it is too quick for us to

realize it. This brings us back to the subject of subliminal marketing, and its ethical risks discussed earlier in the book. That, in a nutshell, is the modern-day marketing, in all its glory and threat.

The field of consumer neuroscience has become popular in industries such as CPG, retail, and media owing to the possibility of leveraging the technology with ease. However, as mentioned earlier, many of the techniques to read brain signals are still dependent on machinery and gadgets that willing participants must wear to allow their brain data to be captured. This is, of course, possible in laboratories, allowing our expertise in this field and understanding of the human brain to have grown manifold. However, most real-time applications of the field are limited to developing software based on that understanding versus enabling widespread real-time market research. To reiterate, the latter is only a matter of time before it too becomes mainstream.

Some of the methods that enable consumer neuroscience include:

- fMRI (functional magnetic resonance imaging), which looks at the bloodstream in the brain as well as regions of the brain more active than others.
- EEG (electroencephalogram), which can measure things like drowsiness and cognitive workload.
- PET (positron emission tomography), which puts radioactive ligands into the bloodstream and see how their accumulation occurs in the brain.
- Computational neuroscience, which uses and builds computer models based on neuroscience to better predict what people are going to do.
- Galvanic skin response, which is used in lie detection tests to measure arousal.
- Sensory load charts can help gauge how much the target people are actually experiencing certain senses on exposure to a brand.
- iMotions [\(19\)](#), which is a tool that can track eye movement, blinks, or distance to screen.
- Neurovision [\(20\)](#), by Neuronsinc.com, which is a software that reveals visual saliency – or how much an image or video is likely to grab attention and where.

The logistical limitations of some of the methods and tools above are a reason why consumer neuroscience is an excellent consideration for smaller businesses to use with existing customers, if at all. This is because trusting customers may

be more willing to cooperate and wear the needed gadgets to allow Una to record their response to the store, the baked goods, and the buying experience. She can also use tools like Neurovision to gauge where in her store the customers are most likely to focus. The tool is very simple to use and all a user needs to do is upload a video or image on the software online. As shown in [Figure 14.9](#), the image on the left is a Coca-Cola ad while the image on the right shows which parts of that ad are likely to draw more attention:



*Figure 14.9: Neurovision in action*

Such insight can fundamentally transform an image or video and improve its effectiveness by revealing whether the company logo or core message is being paid attention to. All this data will feed right back to the front end of the brand journey to enable better positioning, placement, brand identity, and its promotions. This is how the customer onboarding, together with the next stage of brand receptivity, enables marketers to achieve brand resonance.

## 14.4 Referral marketing

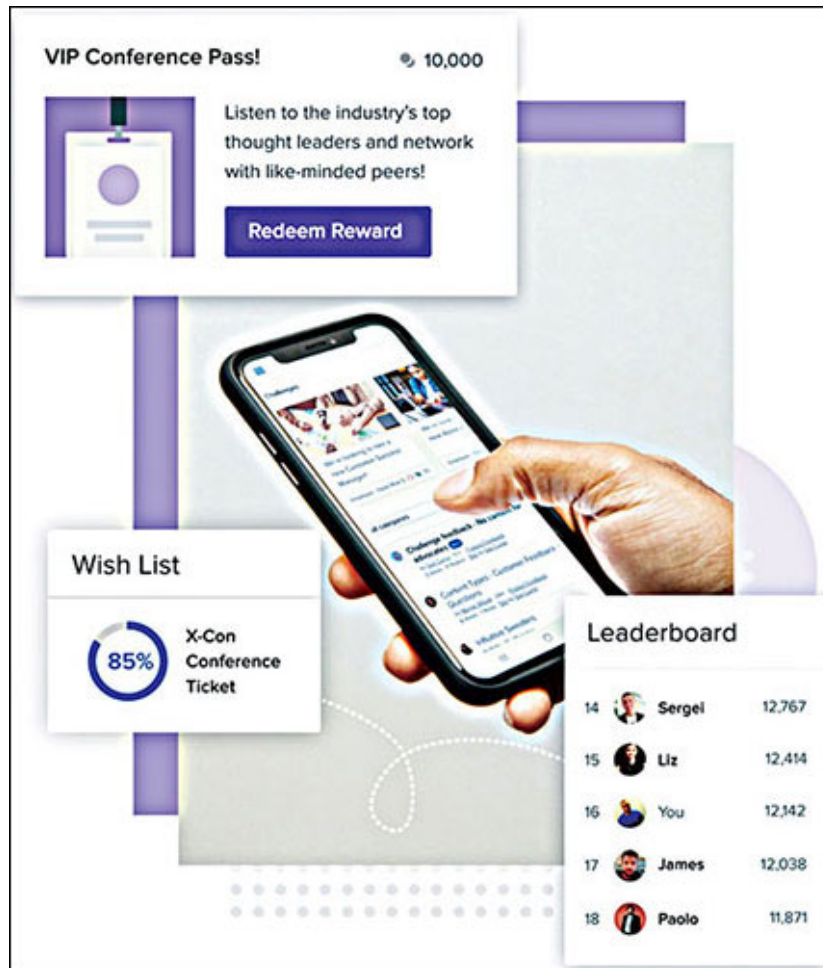
In the very early stages of a brand journey, we discussed how Una's early adopters can initiate **word-of-mouth (WOM)** referrals if they truly like her bakes, resulting in an early influx of customers. WOM came back as a trusted technique that leads to viral content on social media. But WOM can be both positive and disastrously negative. It's not surprising then that there's a branch of marketing dedicated to building and facilitating positive word of mouth. That is called referral marketing.

Referral marketing is a technique to elicit references from existing customers to pull new ones. That can occur through an organization's channels or occur naturally outside of it. In either case, a customer success team can do much to facilitate it. And that is where marketers come back into the mix.

Inducing referrals is as much about timing as it is about enablement, much like we saw with channel strategies. That requires a customer to:

- Be willing to refer a company to someone else
- Know how to make that referral

The former cannot be achieved before the customer has time to be satisfied with the product. However, the willingness can certainly be fast-tracked with the offer of certain incentives in the form of rewards. Be careful not to confuse this with financial rewards necessarily. While they are common and can certainly work, there are sufficient studies in place to show that financial rewards can also dampen a customer's motivation to refer a company. This is because monetary benefits can lend a perception of a reference being bought and reduces the authenticity of the relationship between the brand and its consumer. Alternatives in such a case can range from additional services, product features or preferential experience, to simply, recognitions. Each of these ways to make a customer feel special goes a long way to building loyalty, which is another reason why it is important to keep future referrals in mind at the customer onboarding stage. Consider Influitive ([21](#)), which can create tailored onboarding and referral experiences for each customer with incentivized and fun experiences (see [Figure 14.10](#)):



*Figure 14.10: Customer incentivizing on Influitive (22).*

The other reason to start working towards referrals in the onboarding stage is to facilitate sales cycles. Customer interaction can be minimal or erratic once the formal onboarding is complete. So, this stage offers a chance to the customer success team to orient the customers on how they can refer the product to others in the future, if they are satisfied with it. The company may have a dedicated webpage or more commonly, a coupon code that allows it to identify which customer has referred an incoming lead, and reward the customer accordingly. It also makes the customer's job easy by knowing exactly who or where to refer someone to. And easier the process, the more likely the customer is to comply. As shown in [Figure 14.11](#), Influitive can discover and mobilize customer advocates to accelerate sales cycles!

**Referrals**  
Make a referral today and earn up to **15,000 points!**

Is Influitive's next customer someone you know?

**Step 1**

Full name \*

Work email \*

Company name \*

Submit

OR

Refer by sharing

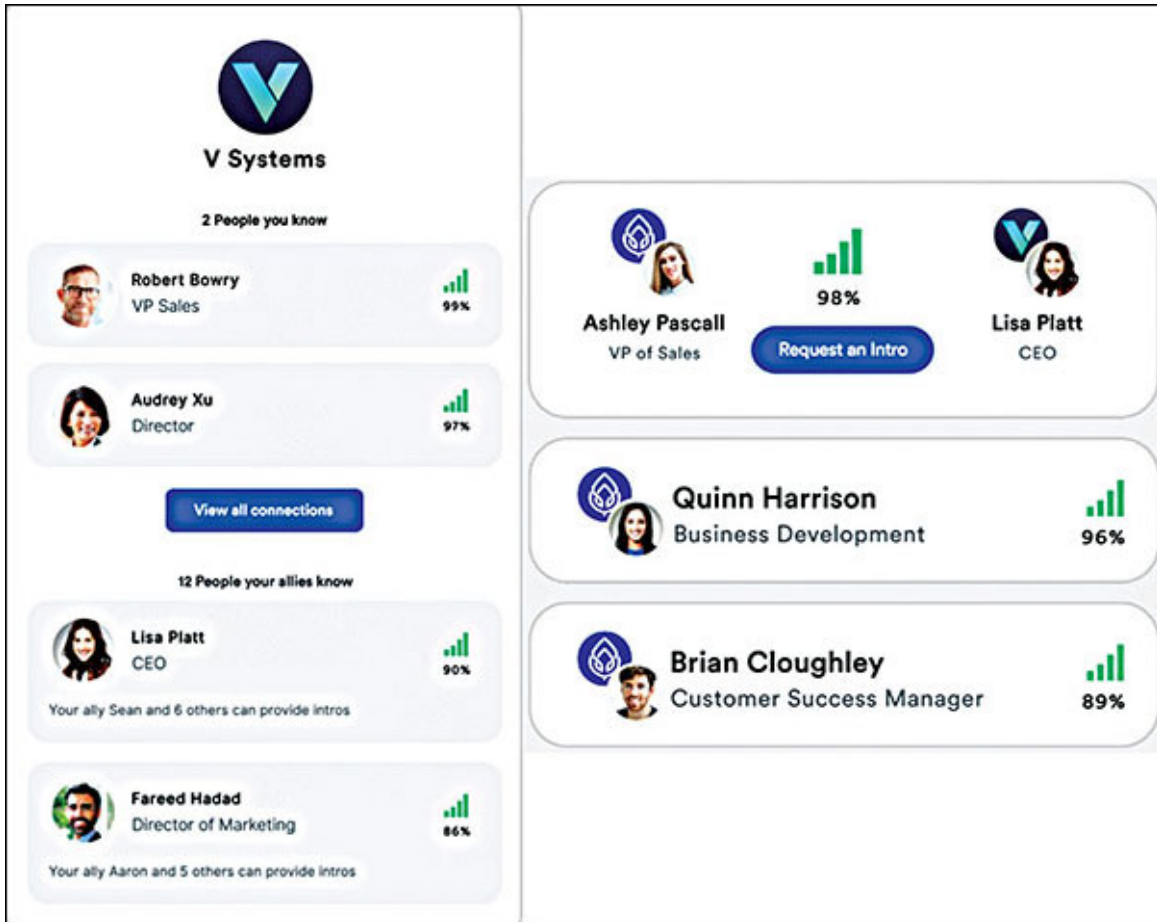
Facebook Twitter LinkedIn Email

Your unique link

<https://infl.tv/iDyt> Copy

*Figure 14.11: Referrals on Influitive (23).*

Tools like Affinity (24) or Referral-AI (25) can complement this process well by revealing a firm's relationship graph to surface potential advocates who may open up new doors (customers or entire markets) or influence prospects in existing cycles. After all, success is often down to who knows whom. [Figure 14.12](#) shows Affinity in action:



*Figure 14.12: Affinity in action (26).*

Keeping track of where incoming prospects are is also important in referral marketing. Used mostly with ads, social media posts, or email campaigns, **UTMs (Urchin Tracking Module)** are generally how this is achieved. These are long-form URLs with a bunch of unintelligible notations after a website's domain address. Alya UTM (27) can help you create your UTM tags, which marketers use for detailed tracking of a source from which a particular visitor came to your webpage. [Figure 14.13](#) shows a standard UTM generator form on Alya UTM that takes in inputs related to the type of campaign, channel, and audience you intend to run and creates a link that can enhance tracking on Google Analytics:

**Alya UTM : The Best URL Builder**  
 This URL builder creates your UTM tags for detailed tracking within Google Analytics, and then checks your website to make sure the URLs behave correctly.  
 Best of everything, it helps Alya's AI understand better your campaigns, check us out at [Alya.ai](#)!

**1. URL Landing Page**

**2. Medium**  
 Medium is the type of channel.  
 Test ('test')  
 Paid Search ('top')  
 Social Media ('social')  
 Sponsored ('sponsored')  
 Paid Social Media / ad boost  
 Email ('email')  
 Display ('display')  
 Website ('referral')  
 Organic ('organic')

**3. Source**  
 Where will you place the link?  
 Test  
 Google  
 Facebook  
 Instagram  
 Twitter  
 LinkedIn  
 Newsletter  
 google-local  
 Other

**4. Targeting**  
 Optional: What criteria are you going after (beyond the selection in graphics)?  
 None  
 Keyword (['keyword'])  
 retargeting  
 Other

**5. Campaign**  
 Optional: What is the campaign?  
 Test  
 None  
 Brand  
 Shopping  
 Other  
  
 Enhanced Format (Supp.: provider-campaign\_name-lang\_region-type)  
  
 Provider who is sending the traffic: agency, internal, partner, platform  
  
 Campaign Name (separate words with "\_")  
  
 Campaign Language (use language code)  
  
 Campaign Region (free form)  
  
 Bid Type (optional, to differentiate network and bidding)

**6. Content**  
 Optional: useful for distinguishing creatives between the same campaign, Google uses (creative)  
  
  
  
**Result URL**

*Figure 14.13: Alya UTM's URL builder (28)*

Of course, teams also have to manage the process to get customer testimonials or reviews in place, which is more straightforward and crucial to a brand's credibility. But that is where referral marketing enters the domain of brand receptivity; a stage that comes after successful onboarding and offers much at stake for the company.

## 14.5 Conclusion

Onboarding is the process of familiarizing and helping your customer realize the value of your brand and its offerings. It is needed in order to ensure proper adoption of your product, without which even a confirmed customer may not use the product as it is meant to, feel dissatisfied and eventually go away.

This process starts by clearly identifying what your customers desire and setting the expectations on the actual outcomes of using your products or services. This



can be done by conducting a quick 30-minute discovery session. The next step is to set up an onboarding and support strategy and plan an implementation schedule. That requires a milestone tracker. Remember to always have this approved by your customer to ensure their comfort level with it. The same process may feel too rigorous or intrusive to one customer and too little to another. Through this process, it is also important to conduct occasional satisfaction surveys so as to track your performance and assess if any changes need to be made to your strategy. The idea is to also maintain a regular touch point which keeps you aware of the customer status and any churn risks to dodge.

The beginning of a business' journey with a confirmed customer opens the doors to develop a richer understanding of the customer, to sustain and grow the relationship, as well as leverage it to tap in other customers. The latter refers to referral marketing as this stage of formal interaction is a chance for the team to request positive referrals in the future, and to show the customer how to do it. The customer can be made aware of the company's appreciation and rewards in store for positive referrals that lead to a confirmed new customer and can be handed a dedicated code or weblink that allows the company to identify the source of referrals easily.

Meanwhile, neuroscience is a growing field that can help in terms of understanding the customer's behavior and reaction to the product. When employed on prospects for better advertising, it is often referred to as neuromarketing. While still in its infancy in the mass market due to the requirement of gadgets for most of the techniques and measures in this field, it is starting to become an excellent option to use with existing customers to better understand what's working and what's not by reading the eye and brain signals to study their response to different brand cues. It is likely to quickly become the focal point of a marketers' attention as the technology advances.

Hurray! Una's clients are all set up and ready to go with her product. By now she has probably built a form of friendship with them too. But to achieve their goals and make them loyal customers and get valuable reviews, the nurturing journey needs to continue in the form of customer success. We arrive now at the business end of maximizing a brand's equity. That's next on the list.

## Questions

1. Which of these are questions customers generally have at the time of onboarding:

- a. Why did they purchase the product at all?
  - b. What is the value of the product purchased?
  - c. When can they start getting that value?
  - d. Who is responsible to ensure that value?
2. Each of the following are ways in which good customer onboarding process can increase a company's revenue, except:
  - a. Increasing the odds of repeat business by the customer.
  - b. Creating an opportunity for future upselling or cross-selling to the customer.
  - c. Facilitating referrals to new prospects by the customer.
  - d. Increasing the domain reputation of the company for search engines to send more prospects to the website.
3. Customer onboarding is a stage where you start building a strong relationship with the customer but not to actively cross-sell to him or her. Is this statement true or false?
4. \_\_\_\_\_ helps you learn about your client's desired outcome of using your products or services
5. Put the following customer onboarding milestones in the right order:
  - a. Follow-up to check on client satisfaction.
  - b. Create and approach an onboarding strategy.
  - c. Set up and complete a discovery call.
  - d. Execute the onboarding.
6. Keeping regular contact with the customer is important even if there is no service need or selling opportunities because it helps maintain the relationship and avoid churn risks. Is this statement true or false?
7. The frequency of regular touch points may differ from customer to customer, depending on each customer's preference. So, if a customer suggests having only one touch point in the year, that is what we do. Is this statement true or false?
8. Referral marketing is required for successful onboarding. Is this statement true or false?
9. Positive referral depends on which of these factors:

- a. Timing of referral opportunity
  - b. Customer's willingness to refer you
  - c. Customer's knowledge of how to refer you
  - d. Financial rewards
10. One of the goals of the referral marketing team is to get a positive online review, in order to influence indirect referrals to other prospects without having to wait for an active referral. But for this, they must work hand-in-hand with the customer success team, which is already in touch with the customer. Is this statement true or false?

## Answers

- 1. B, C, and D
- 2. D
- 3. True
- 4. Customer discovery
- 5.  $C > B > D > A$
- 6. True
- 7. False

Following a customer's preference is important, but within reason. While the customer may prefer to not be disturbed, risk avoidance and relationship management dictates that we do an occasional reach out nonetheless, even if it is a cordial hello or courtesy check-in. Companies can also mandate a 15-minute touch point every quarter or semester, or three months before contract renewal date as part of their policy, if required.

- 8. False
- Referral marketing plays a role at the onboarding stage to increase the chances of new business for the company, but is not essential for the successful onboarding of an existing client.
- 9. A and B
- 10. True

# CHAPTER 15

## Brand Receptivity

Establishing brand receptivity is the stage where you ensure that your customers feel like they are heard and appreciated. Without that, a relationship cannot be strengthened further. Making customers feel valued is also a softer and delicate metric which cannot be achieved by hard processes and tactics alone. In this chapter, we will look at how to achieve this stage while ensuring that your customers are happy with your offerings. We will also learn how to manage a growing team efficiently. Both of these are important if a business is to survive (which requires customers to stay), thrive (which requires them to bring more business in the future), and achieve resonant immortality (which is the kind of sentiment customers should come to carry eventually).

### Structure

In this chapter, we will discuss the following topics:

- Importance of receptivity
- Managing the customer relationship
  - Managing B2C customers
  - Managing B2B customers
- Managing customer issues
- Preparing for growth
  - Sustaining the relationship
  - Upselling and cross-selling
  - Soliciting feedback and reviews

### Objectives

This chapter has the dual objective of turning the customers loyal and making a brand more receptive in order to validate its odds of achieving resonance. By the end of this chapter, you will be able to understand the ways in which brand

receptivity is important, communicate with your individual or business customer in a timely and efficient way to manage the relationship, learn some best practices to manage customer issues effectively, learn how to measure customer satisfaction, know what technology to leverage and when through your customer receptivity and success stage, plan for an effective and efficient growth strategy as your team and offerings grow, and get the missing insight needed to achieve brand resonance.

## **15.1 Importance of receptivity**

Since its advent in the 70s, the gaming industry has grown exponentially to widen the gap as the biggest earning media sector with 2.7 billion gamers worldwide in 2020. **(1)** It was propelled primarily by the arrival of the internet, which also spawned the era of mobile gaming that pushed most other channels to the brink. Together with PC and console, they now occupy over 95% of the \$165B industry. **(2)** We expect the future of gaming to be taken over by Cloud and VR, but that is a different story. Rewinding the clock back a decade, it was no surprise when in 2009 *Stewart Butterfield* founded Tiny Speck to build another game (after his first had flopped in the market). **(3)** The non-combat collaborative multiplayer online game, called Glitch, featured one tiny rock as a “*familiar*” (a character in a video game designed to assist you) guiding the players on what to do. Underlying that was a unique messaging technology that helped players collaborate. **(4)**

When Glitch shut down in 2012, it was not so much due to its failure to take off in the gaming world, but the Tiny Speck’s receptivity to a hidden gem in their portfolio that was proving to be a hit with its customers: the messaging technology that could help teams collaborate better by exchanging group or private messages and sharing files. The brand paid attention to its customers and moved away from the gaming industry to enter the more serious office productivity industry. The product was called Slack, and it was eventually acquired by Salesforce for \$27.7 billion. **(5)** That’s 16.7% of the entire gaming industry!

For any brand, the closer we move to the resonance stage, the more our focus moves from the visible to the elusive, from the more practical, tangible objectives to the more emotional, intangible ones, and from being a good orator to being a good listener. Logic would have advised Butterfield to stay in the growing gaming industry and to hang in there because growth takes time, but it was listening to the customers that set him on a hidden multibillion dollar path.

Even for companies not requiring a pivot, receptivity can have profound effects by moving established customers towards loyalty. It allows your brand to welcome feedback and make the customers feel listened to.

Brand receptivity is an essential step for three reasons:

- By making your customers feel listened to and valued, you make them take a crucial step towards becoming loyal fans; in other words, it is the bridge to achieving brand resonance.
- It opens up opportunities for more business with the same customer, not only by retaining them in the future but also by upselling more of the same product or cross-selling other products to them.
- It allows you to correct any false assumptions about your target customers, product, positioning, and the overall brand identity, as Una had started to learn from her focus groups.

To achieve something as ephemeral as loyalty and fandom, could there be a process. Yes and no. While those states are a matter of how a brand makes a customer “*feel*”, there can certainly be a process in place to help a brand manage that successfully. For instance, there are tools like Decooda’s CX Workout [\(6\)](#) that can map and support the entire customer journey, as shown in [Figure 15.1](#):

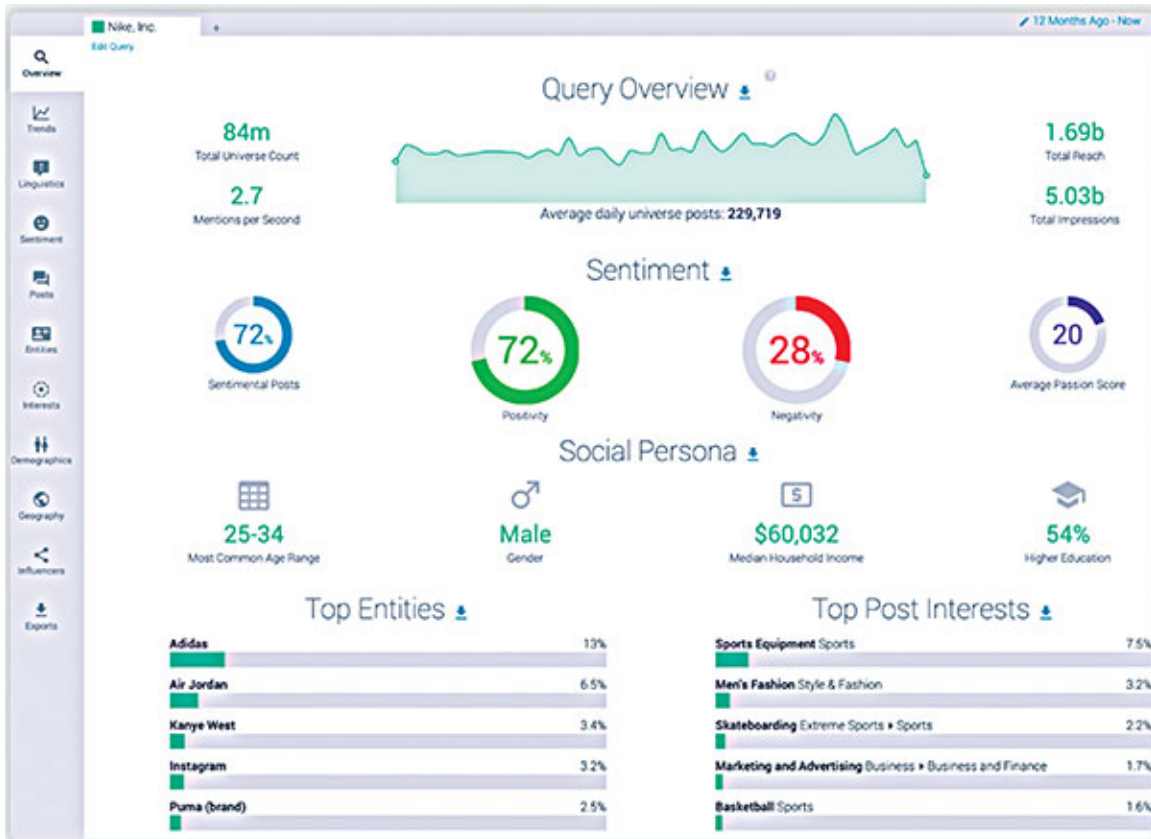
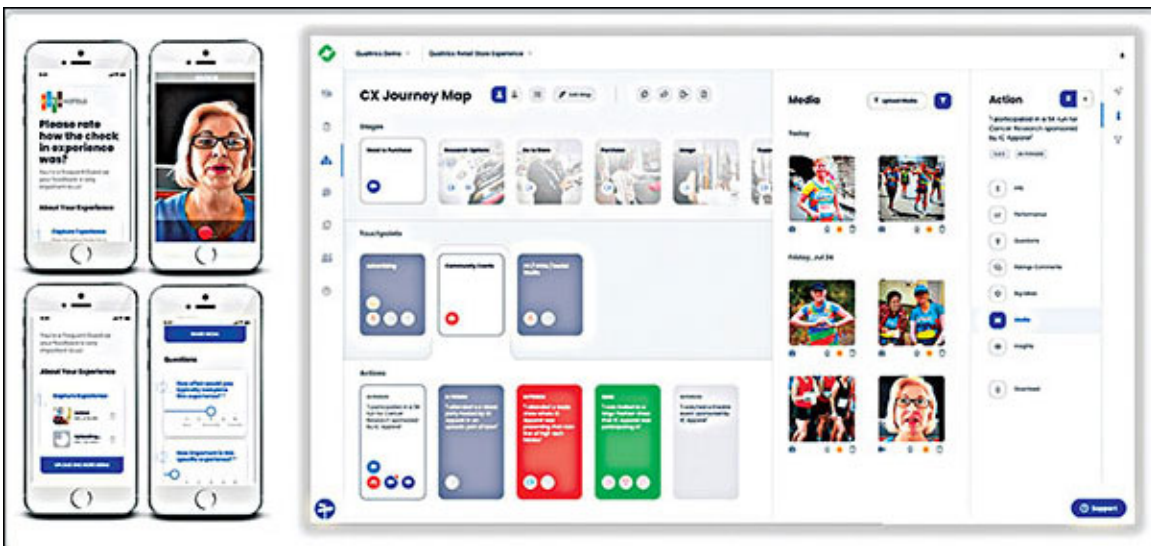


Figure 15.1: CX Workout in action (7)

Next, “listening” to the customers can start with something as simple and obvious as social media tracking. Consider Infegy (8) which, like a few other tools we have seen earlier, can reveals sentiments, personas, and interests, as shown in Figure 15.2:



*Figure 15.2: Social listening by Infegy (9).*

We can also then dive deeper into the listening part with dedicated qualitative and quantitative surveys and tools that enable them. Let us see some examples.

## **15.2 Managing the customer relationship**

How can Una achieve loyalty? 86% of your customers will pay more for better customer experience. (10). And this experience stems from a relationship that has its roots in the form of best friends. Customers today want to engage with your brand the way they do with family and friends over call, email, chat, social media, and other channels. And they will not necessarily speak only with the customer success team, but also with others tied to the brand. A consistent omni-channel experience from the whole team is therefore crucial. That requires both training and data. The specifics of initiatives that help may differ between individual and business customers.

### **15.2.1 Managing B2C customers**

While ensuring that all of Una's individual customers stay happy can seem like a daunting task, it really can be made easy. The smallest of gestures like a hello, a smile, an opened door, can mean a lot to people. To get Una started, we've put together a small list of things she can do to make her customer a happy customer:

- **A personal welcome goes a long way:** Una should try and get herself and her staff to remember the names of the customers that frequent her store. When they walk in and she/her staff greet them by their name, they will definitely see their customer's face light up! This will also create the perception among first timers in the store that Una has a following, and therefore, must certainly be a great place to shop from.
- **Create a community:** Una can create an exclusive community by getting customers to sign up for a free membership. Through this membership, Una can create a point system to redeem offers, get access to exclusive deals to her products or classes, and so much more. This will help her customers feel special and even help her upselling. For those who are interested, she can even create a WhatsApp group. A community goes a long way in terms of loyalty and support.

Skopos Connect (11) is one of the leaders in this space, enabling dedicated brand communities for market research – either for continuous insights or



quick pop-up surveys. [Figure 15.3](#) shows a screenshot of their Porsche Advisory Club. It is easy to see why being part of this club would be prized by any Porsche customer:



*Figure 15.3: Porsche Advisory Club on Skopos Connect (12).*

- **Special occasion service:** Una should try and collect the personal details, such as birthday, anniversary, and more of her customers with their consent and within legal bounds. Once she has this, she can lend small gestures in the form of a text wishing them, or a free dessert coupon, and so on. This will drive repeat visits and loyalty!

Remember when we spoke about discounts that may not get Una her desired ROI. Emarsys [\(13\)](#) can help her tackle that issue. This tool helps increase customer engagement by sharing experienced based incentives vs generic discount vouchers, and more. That helps leave the customers excited as exclusive access to her products and services etch the experience in their memory. [Figure 15.4](#) shows a setting to deliver a “surprise gift” message when a customer spends more than €200:

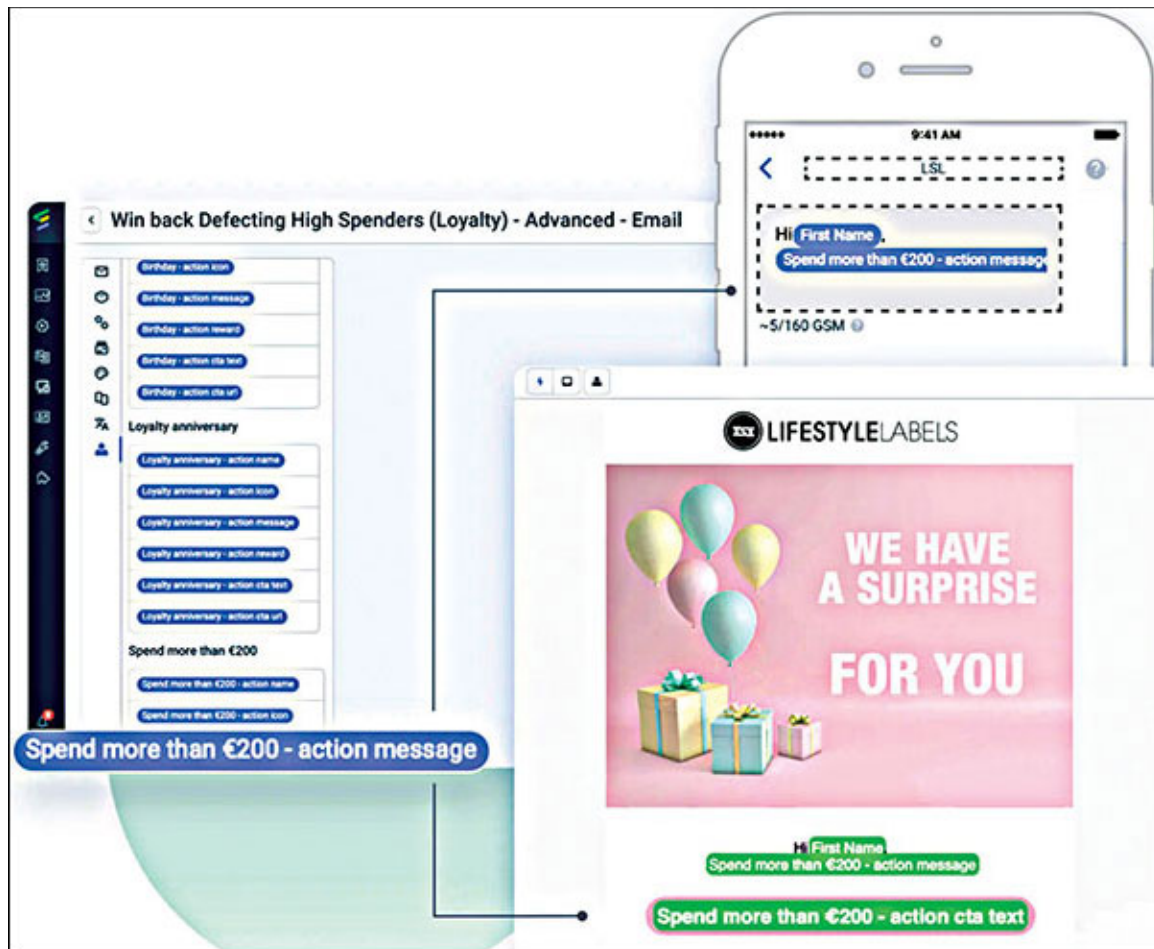


Figure 15.4: Loyalty benefits deployment on Emarsys (14)

- **Monthly newsletters packed with value:** As mentioned before, Una can send monthly newsletters packed with useful information like “how to bake a chocolate fudge cake with everyday ingredients”, “What you can do with stale bread so that you avoid wastage”, and so on. Customers will see this as an added value that they get out of being Una’s customer in comparison to someone else’s.
- **Enable the customers:** With or without Una’s help, her customers should not have to go through a lot of effort to find products, learn about them, get their queries addressed, make a purchase, or accomplish any of the post-purchase engagement (say, to return a product or provide a feedback). The focus here is on the process Una builds to make these things easy and seamless for customers. For instance, it won’t be enough for Una’s website to list all products with great imagery and description, if the customers can’t easily find what they are looking for.

On the topic of findability, tools like Coveo ([15](#)) are becoming popular by the day. Essentially a more focused search engine, these tools help organizations ensure that the relevant product or information surfaces first when customers search for something.

- **Install a “happy” bell in her store:** These are quirky little things that lend Una’s brand a personality, the significance of which we will see in the next chapter. Una can use this as a way for her customers to express their happiness. For instance, a common sight we often come across is one where she can ask customers to ring the bell if they are happy with the service they received, and when rung, get her staff to clap. This will keep a positive vibe rolling in her store. She can also get her staff to ring the bell when a customer has a birthday, anniversary, or special occasion there. This will make her customers feel appreciated as well.

Not all customers are the same, nor are all the brands. The choice of initiatives depends on the personalities of both. For instance, if Una’s brand positioning is classier and more elegant, jovial or intermittently noisy celebrations may not fit the bill. On the other hand, if her customers come to her shop for a quiet book-reading café moment, they may not appreciate getting too much attention. The idea is to make the customer feel appreciated and valued, but the way to do it depends on the perception Una is trying to create about her brand and her choice of target customers.

Of course, this list, much like the tools we discussed throughout the book, is not comprehensive but a direction in which Una can start thinking to come up with more such initiatives. But while individual customers can do with such intermittent touch points, Una will have to be a bit more process-centric for her restaurant clients.

## **15.2.2 Managing B2B customers**

Let’s start with how Una can become her business clients’ best friend, process-wise first. Here is a mantra that may just help her!

Milestone 7, from the previous lesson on customer onboarding, helped Una learn what her client communication schedule needs to look like. The next step is to strategize it. She can start by categorizing her clients into first, second, and third tiers. Naming the tiers doesn’t have any hard and fast rule to it. But what she needs to keep in mind while categorizing them is their touch point requirements,

i.e., communication needs. The ones who need to be contacted, say once or twice every month, go in the first tier; the ones she needs to contact less, say once in 3 - 5 months, go in the second tier; and those that she needs to contact once in 6 months or so go in the third tier. This division may also depend on other factors such as the client's value in terms of the pricing tier they fall in, or the channel importance. Some channel partners are more important and strategic than others and would want customers who go through them to be taken care of a bit more than needed.

This brings us to the next question: How does Una decide/plan the frequency of these touch points? Besides operational feasibility and client preference, it depends on her product. For example, the frequency for products in the technology sector would be higher since they are probably the type that need multiple training sessions, will have periodic feature updates, and so on. A product like Una's may not necessarily need so many touch points, unless the landscape is very competitive. It would also depend on the order replenishment frequency and needs.

Once Una has categorized her clients, it's time to plan what each touch point should ideally be about. Bear in mind that one of the core reasons for this schedule is to ensure brand receptivity, that is, making Una's clients feel that they are heard even before they know they need to be heard!

As an example, let's consider a client from tier 1 of Una's communication schedule. Let's say the client is 'The Royalty', a hotel that contracts Una's baking services for its in-hotel restaurant and cafe.

**Here's how Una could go about planning *The Royalty's* schedule:**

**1st Touch Point:** 1 month after "Onboarding Milestone 7"

**Type:** Call

**Goal:** Check whether all is good post-onboarding or if they need any more help. It's not too uncommon for a client to realize that they need more help after going through the entire onboarding process. This should be a short call and to the point. For example:

*"Hi {Name}, how are you? It's been about a month since we finished our onboarding session, so I thought I would do a quick check-in to see how you are doing and if you need any further assistance."*

If they do have any more requirements, make sure you document it and plan out an execution strategy for it.

**Order Check Touch Point:** 15 days before the next order

**Type:** Call

**Goal:** Confirm requirements of the next order. Make sure to get all the details here. In Una's case, this could mean:

- Order type
- Order segmentation such as gluten free, nut free, vegan, etc.
- Quantity for each order segment type
- Order due date
- Preferred time of delivery
- Point of Contact for the order pick-up and confirmation, etc.

The more effective and efficient your operations are, the more your client will feel at ease and trust you as a vendor. It is not only because of your professionalism but also because it is suicidal to ever assume that the client will be organized. The client has a ton of other priorities on his plate and has generally drifted off to other matters soon after you call.

**Feedback Touch Point:** Once in 3 months. Skip this step in the months when you do a renewal touch point.

**Type:** Email

**Goal:** Check whether they are happy with the quality of your products and service with a survey. Include a feedback section to the survey so they have the opportunity to tell you what they think you can improve on, etc. For example:

1. **How happy are you with our products?**  
(Extremely unhappy) 1 - 2 - 3 - 4 -5 (Extremely happy)
2. **If your choice was between 1 - 2 for the above question, please specify why.**
3. **How happy are you with our customer service?**  
(Extremely unhappy) 1 - 2 - 3 - 4 -5 (Extremely happy)
4. **If your choice was between 1 - 2 for the above question, please specify why.**
5. **What are the most in-demand products from our bakery?**  
(Assuming Una supplies varieties of breads and/or other bakes. Here, Una would list all her products with a priority scale.)

**6. Were all your orders delivered to you on time?**

Yes

No (Please specify)

**7. Was the delivery service friendly and easy to navigate?**

Yes

No (Please specify)

**8. Did the orders meet your expectations?**

Yes

No (Please specify)

**9. How do you think we can further improve our products?**

Involving customers in product design is always a win-win situation. It can help Una create exactly what they need, while ensuring their happiness and loyalty. More importantly, it makes the customers feel they have a stake in the product too. The only thing to watch out for is setting overly high expectations in terms of how far she can adapt to their custom demands, and the level of customization she can feasibly induce for each customer.

**10. Have we helped you achieve your desired outcomes? If not, why?**

**11. Would you recommend our bakery to others?**

Yes

No (Please specify why)

**12. What would you recommend we do to make your experience better?**

**13. Any other feedback?**

This will help Una understand how she can ensure the customers' loyalty and keep those orders coming! In each touch point, Una can also include educational material in the form of blog posts. Topics like "*How to better preserve baked goods*" or "*How to enhance baked good flavors right before serving them*" can help prove to be beneficial to her buyers and thus, leave them feeling like they got additional value from her service!

**Renewal Check Touch Point:** 90 days before contract renewal

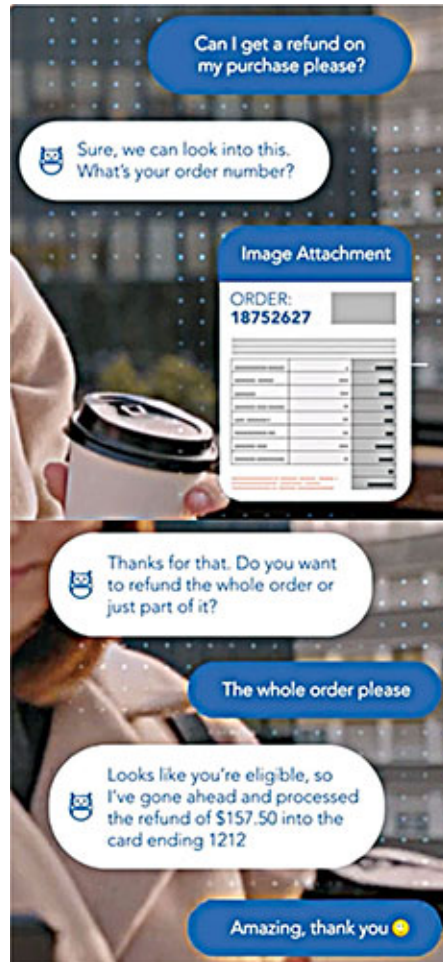
**Type:** Call

**Goal:** This would be similar to a feedback call but the goal here would be to assess how likely customers are to renew their deal. This is best understood in person since Una can track the body language and engage in a deeper discussion.

In a worst-case scenario where they've decided not to continue with her, she should make sure to have a customer cancellation survey in place to learn why they decided to cancel her services or what could've triggered this action. Most importantly, Una should never view the end of the deal as the end of the relationship; the latter must continue.

The above-mentioned touch points can be customized to meet the requirements of Una's other tiers. For example, she can do the feedback touch point once every 3 months for tier 2 clients and once every 6 months for tier 3 clients. She could even alternate between calls and emails depending on her client's preferred way of communication – this is something she would've figured out in the customer discovery call which was part of the onboarding process. In the case of email touch points, we would suggest having templates in place for Una or her team to use, just as she did for onboarding, with space for personalization!

AI can help set up a system to communicate with customers across channels, auto-address queries, and direct them to the right information or resource. For instance, DigitalGenius [\(16\)](#) optimizes customer support by understanding conversations and automating repeat processes, as shown in [Figure 15.5](#) for a case of refund being handled by AI:



*Figure 15.5: DigitalGenius in action (17).*

Tools like Freshworks (18), Acquire (19), or Zendesk (20), meanwhile, are great examples of an AI-based customer experience enabler that may not automate everything but can work across multiple channels and help in cross-functional coordination. Freshworks, in fact, houses a platform with solutions for multiple functions in-house, including a CRM! Meanwhile, a Zendesk conversation among a chatbot, an agent, and a customer is illustrated in [Figure 15.6](#):



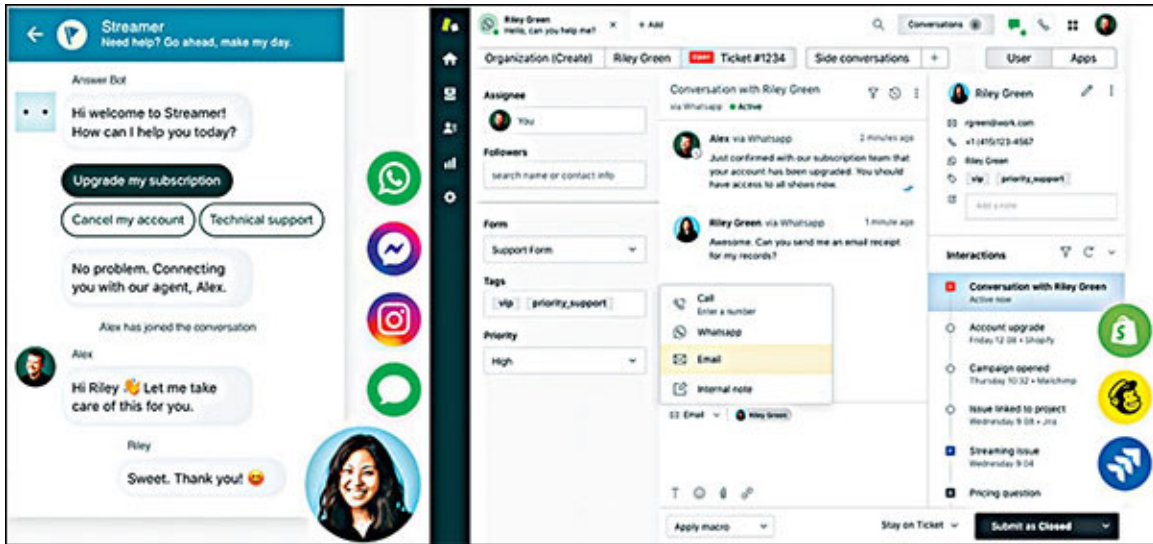


Figure 15.6: Zendesk in action (21).

## 15.3 Managing customer issues

A relationship cannot be sustained without properly dealing with its ugly moments. There will always be times when the seemingly cordial receptivity of a company and the loyalty of its customer get tested. There are examples galore to cite both successes and failures on this note, but the greatest story of them all belongs to the Taj Group of Hotels. A premium and leading hotel chain in India, the company faced its most difficult moment on November 26, 2008, when terrorists attacked the city of Mumbai, wreaking havoc in multiple destinations simultaneously, including at the iconic Taj Mumbai. 31 people died at the hotel alone, but it was a figure that could have easily run into hundreds over the many hours the hotel was under attack from within its walls, had it not been for the hotel staff and the company's exemplary training and culture. The key differentiator: Taj trained all its employees to be ambassadors to the customers, not the company. (22). That spirit saw the employees put their lives at stake to protect the guests. For the company, it saved the lives of over a thousand guests who were in the hotel at the time of the attack, even though it came at the cost of the lives of 11 of its own.

What's the cost of good customer service and what are its returns? We mentioned in [Section 1: Understanding the Brand Journey](#), of this book that customer success is one of the legs on which a brand stands; ethical, moral, and legal standards being the other. The Taj story helps us understand how it can strengthen or destroy a brand in moments of crisis. For most companies, however, crisis unfolds in little unseen ways with individual customers, mostly

over the phone, every day. That is why, like the brand equity itself, the damage or rewards of customer success is hardly ever apparent until it leads to something drastic.

Customer issues are inevitable. Managing them requires a mix of avoiding common mistakes and going out of the way. The objective is *to turn your employees into an ambassador for the customer first*. This policy takes training and practice ingrained into a company's culture. In case of Taj, for example, the staff put their lives at stake to protect the guests without question because they had not only been trained to tackle issues to the customer's satisfaction without the need of a supervisor but also to do so with the confidence that any action taken in a customer's best interest will be supported by everyone, right up to the CEO.

Any effective issue resolution involves two phases:

- Pacifying a frustrated customer
- Solving the problem in the eyes of the customer

Let us look at a few best practices that go into each:

1. **Pacifying a frustrated customer:** Good customer success is not so much about solving a problem than about making a customer feel better. A happy customer will forgive a brand's mistakes, but an unhappy one will find cracks even in the brand's successes. And the very purpose of customer support is to keep a customer satisfied. To achieve this satisfaction, one needs to keep the following points in mind:

- a. **Listen:** A no-brainer and yet, a rarity for most in our species. Customer success reps are busy handling multiple issues every day, most of which are repetitive. It is common for reps to listen to keywords and jump to conclusions on the problem. Listening involves more than just words. It includes the tonality, context, and little details that may be missed if we solely rely on the customer's ability to articulate his problems effectively. Most importantly, if a customer does not feel listened to, you have already made him feel alienated.
- b. **Minimize the standardization of responses:** A customer may not feel listened to, or appreciated, also if he receives a standard response that everyone else gets. It may simply be a matter of rephrasing that response to make it more personal, and it is not hard to do. In addition to "*listening*", this step goes a long way to opening

a customer up to your attempts at solving the problem and making a frustrated customer more understanding. More importantly, it preserves the achingly long process of customizing the brand experience that the marketers and sellers went through previously with the customer.

- c. **Take accountability:** Not only for the problem but also for your colleagues. How often have you heard a customer service rep tell you that he doesn't know who you spoke to the last time and cannot vouch for what that person may have told you? Not wanting to take accountability for how our colleague handled a problem previously comes naturally to us. At the very least, employees have to be understanding of the customer's plight at dealing with multiple individuals in their team. Companies have to take this tendency out of the equation in order to avoid the customer feeling helpless, exhausted, and distrustful of the brand.
- d. **Set the right expectations:** Another reason for customers to lose faith is to be underwhelmed with the resolution. Customer success reps are not magicians, and the customer is (generally) a reasonable human who also likely faces issues at work. In initial moments of anger, customers may claim that they do not care what it takes to solve their problem, but once they cool down, they almost always acknowledge the sincerity of effort put by the rep in solving a problem the best he could if it were apparent to him.

In addition to the automations discussed earlier, Sprout Social ([23](#)) can also help Una analyze the words and sentiment of a tweet, post, or message (similar to Infegy) and suggest a response to it. This automation will help her quicken the process related to sending quick messages or responses, particularly in case of a grievance. A handy build to this is SproutSocial's brand engagement summary, which can keep a brand in tune with the overall positivity or negativity of its performance:

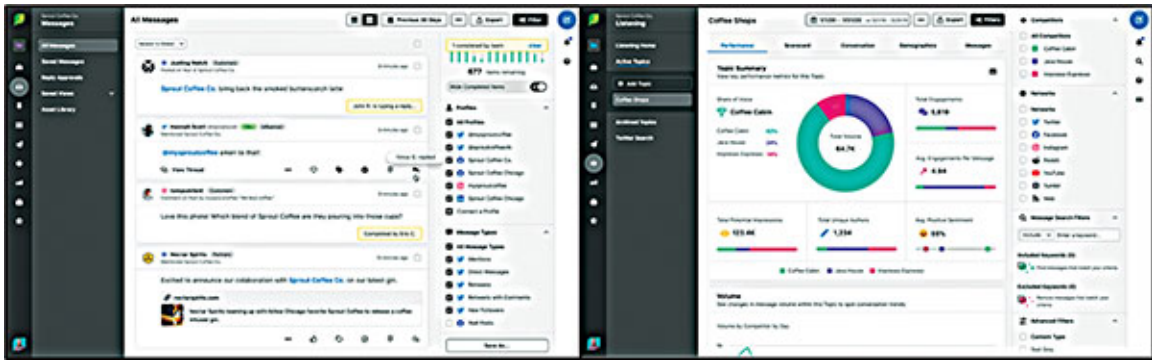


Figure 15.7: Tracking & managing brand engagement on SproutSocial (24)

For certain types of issues or products that require more deliberation, tools like SessionCam (25) can come in handy. This one records the interactive customer support session from the user’s point of view, mapping the clicks, scrolls, zooming, mobile gestures, and all other such behavior a user undertook on a page or during the session with customer support, thus allowing deep insights into an issue from the user’s point of view.

2. **Solving the problem in the eyes of the customer:** Not all problems can be solved quickly, easily, or at all. But a **problem is often not the main issue that does the damage; it is the way we react to it that makes it so.** So, it is important to understand that at most times, the objective of an issue resolution is to meet the customer’s satisfaction, and that may be different than what the organization considers to be the “best” resolution. The following points can help achieve this:

- a. **Take interest and ensure follow-up:** We learned that it is important to convince the customer of the sincerity of a company’s effort to address their issue. A great way to do so is by sounding interested in solving the problem and taking the initiative to follow-up with the status of the problem, via email or phone. That is enough for customers to rest easy that their issue is being genuinely looked into and prevents them from relapsing into the frustration zone.
- b. **Empower the employees to lead or escalate without fear:** Most employees are helpless in pacifying a customer because they feel limited in their power to address issues beyond a point. A hesitation to hand over the customer call to the supervisor is common if employees feel it will reflect their inability to deal with the situation. While proper training can ensure it is hardly ever needed, as in the case of Taj, proper training also implies that employees should be

able to escalate an issue if the root cause is a matter of a faulty company policy or practice that the leadership needs to look into.

- c. **Equip the employees with visibility across the organization to procure new information:** Even with the best intention, an employee can struggle with solving a problem if they do not have access to the right tools and the teams responsible for the issue. A company that is serious about customer success should ensure that all other teams prioritize inquiries from this team and support it without question. Remember that sustaining a company necessitates first ensuring that existing customers are not lost. So, any such threat should take precedence over the chase for new customers.
- d. **Choose the performance metrics wisely:** This one is meant more for the leadership. Suppose Una incentivizes her team more by the number of customer cases solved than the customer satisfaction levels with those solutions. This would be a classic mistake that leads to disgruntled customers as service teams become more concerned with closing the case as quickly as possible than waiting for customers to be satisfied with their handling of the case.

Large volumes in customer issues or requests can become a menace for an organization, which is why some foresight and planning to proactively address common needs or pain points becomes key for a growing company. That can bring a hefty price tag, which ties back to the need for the company to automate some solutions and forecast revenues accurately to plan the next moves. Tools like Anaplan ([26](#)) can help here, as they allow people enterprise-wide to access data and be aligned.

## **[15.4 Preparing for growth](#)**

Those who use Google (phone, Maps, and more) often get a prompt to post a review for places they have recently visited. In an industry where soliciting reviews is a tough job (unless the traveler wishes to vent out), Google has been remarkable in the reviews it manages to collect for places on its maps, strengthening the product and its authenticity more and more. There is a stickiness to the system that keeps most users from stopping, all thanks to Google's mastery in gamification.

Every reviewer is allocated points and badges for his ratings and reviews. He is also incentivized to keep rating places in order to climb up the "reviewer"

levels and receives regular encouraging updates on how well he is doing. And therein lies the secret sauce: Google manages to make almost everyone feel special and feel valued for rating places. For instance, many find themselves in the “Top 1%”, “Top 10%” or just “Top” of rankings in some way or another – from “top reviewer of Italian restaurants” to “top 10% reviewer in XYZ neighborhood”. Others receive notifications like “your reviews are getting noticed” or “your reviews have been seen by 10,000 people” – both of which are achievable, thanks to a network effect due to the sheer volume of people using Google Maps and looking at reviews every day. In the end, this feel-good dopamine-driven experience keeps the users engaged and keeps churn levels low.

As discussed, growth happens after the “leakage” of customers out of the company is effectively plugged. So, with a growing customer base, a growing team is sure to follow. But Una cannot rely on manual presence to support every customer 24X7. That necessitates automation, particularly with conversational AI tools we have seen in earlier chapters. Netomi (27) and Gamalon (28) are a couple of more examples. The latter can learn a company’s offering and conversational style within 1-2 days of only feeding it the company’s website domain! Once ready, it can not only engage incoming messages but also read the text of customer messages real-time to predict behavior for better customer experience.

Now that Una has everything ready from a client focus, it’s time to make sure that she and her growing team are prepared with all the information and tools needed to:

- Ensure that the relationship is sustained
- Capitalize on upsell or cross-sell opportunities with the customers
- Solicit positive reviews or testimonials

The latter, in particular, is a vital bridge to the next step but the trick to these points can be summarized in one word: seamlessness. The more seamless a brand makes it for the customers to buy more of its product or buy other products it offers, the more likely they are to invest more in the brand. Likewise, the more seamless a brand makes for the customer to comfortably share his opinion, the more honest and clear his feedback would be and the more accurate the brand’s understanding of its perception and market will be. Let us dive into each point further.

## 15.4.1 Sustaining the relationship

The first thing Una wants to do is educate her team about her company, what it stands for, what its mission is, what her product is, what its benefits, strengths, weaknesses are, etc. She can create a training session for her team to aid this, particularly video training sessions, which work for clients too. This can come handy for new joinees over the long run.

She also needs to figure out a tracking system for her process, which tells her in a quick overview, things like:

- Which sales rep is assigned to which client?
- What stage is a client at and along which milestone/touch point?
- Are there any key takeaways from those specific steps?
- Are there any client comments to keep in mind for the long run?

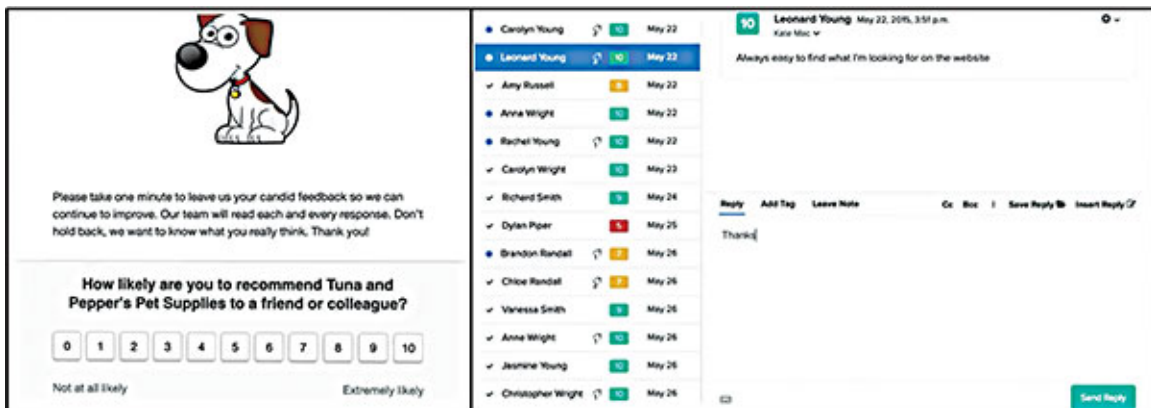
High-performing organizations swear by good and timely data. As discussed earlier, all data generated from the customer should be fed right back to the CRM system in place, so that each customer record contains all associated information in one place. A good tool will have workflows that will enable Una to automate a fair portion of this process. This would include setting up automated actions such as task reminders and email/survey send-outs based on criteria like the client enrolment date, response rate, tier, etc. It basically means that Una or her team would need to just do a quick check once in 2 weeks to make sure things are running smoothly for that part of the process and focus on the calling bit themselves. It really comes down to what level of control she wants over the process or what she is most comfortable with.

Una can create an excel sheet if she prefers an easy way to track metrics. The metrics differ by industry, product, and customer type. As an example, for Una's customers, she can track things like:

- The number of customer service inquiries per month.
- Average time it takes to respond to the customer.
- Average time it takes to resolve a customer's query.
- % of times the query is resolved with helpful information on the website or self-serve options.
- How complete the customer service data is for each customer, etc.

A great measure for customer experience is the **Net Promoter Score (NPS)**. It is essentially based on how likely your customer is to recommend your brand to someone else. On a scale of 1-10, those with a score of 9+ are Promoters, while those with a score of 6 and below are Detractors. NPS is the difference between % of Promoters and the % of Detractors a brand has. The score can range from -100 (if all customers are Detractors) to +100 (if all customers are Promoters). Many organizations consider a score of +100 as the ultimate goal of a brand and its customer journey. In many ways, that is true. However, an NPS score of +100 may still not be the same as absolute brand resonance. The former may reflect absolute loyalty, which may be due to convenience, familiarity or a host of other factors gone right. The latter, on the other hand, reflects passion and fandom, which is a much deeper personal connection.

Tools like Promoter (29) (by Medallia) can help companies understand the ‘voice of the customer’ by allowing them to build, launch, measure, engage, and take action on Net Promoter campaigns, all in one place. [Figure 15.8](#) shows an NPS survey on Promoter, followed by a summary of individual ratings which help it calculate the NPS, and one-on-one interaction capability:



*Figure 15.8: Promoter in action (30).*

## 15.4.2 Upselling and cross-selling

As we already know, the primary difference between B2C and B2B customers is that the latter generally requires deeper engagement-level data for every single customer. The former is higher in volume and may not require such data on every single customer. Let's bring in Amazon for a moment here. Like most enterprises, it has a separate division for its B2B cloud-based **Amazon Web Services (AWS)** and a different one for its mainstream ecommerce consumer business, despite the fact that the buyers involved may be the same individuals (or



business teams) on both sides. Amazon started off with its B2C vision of selling everything (A to Z, as its logo indicates) on its channel, open also to any business looking for, say, a new office furniture. But it soon diversified into also selling its own product: the Prime subscriptions. At first, Amazon tried to upsell its customers on Prime membership, which allowed free delivery. Gradually, Amazon moved to also cross-sell the customers on Prime's **over-the-top (OTT)** media service, competing with the likes of Netflix. Today, the common Prime brand allows the two products to work in tandem with mega discount "*Prime days*" and a slew of original movies and shows enabling all of upsell, cross-sell, and new customer acquisition each month.

Upselling is when you sell "*more of the same*" product to the same customer, whether by adding more features or adjacencies to the product or increasing the volume of product sold per order. Cross-selling is when you sell a different product to the same customer. The new product or service may not necessarily be related to the original item purchases. Both upselling and cross-selling are ways to:

- Increase the customer's share of wallet linked to your brand
- Add hooks to retain the customer and sustain repeat business

Both, therefore, result in increased revenues and deeper relationships. However, as discussed in the previous chapter, there is a proper time for it. The first step is to stop churn, that is stop the customer from going away in the first place, which is what customer success is primarily built to do. This is why the continued collaboration of sales and customer success teams is important. Otherwise, at this stage, it is the customer success rep that will have to do the selling!

The steps we saw in managing customer relationships and the data captured on customer status generally work together to indicate when it is an opportune time to attempt more selling to a given customer. For example, major network carriers in the US know that customers are generally on a two-year plan to buy out the phone they are using. As that term draws nearer to completion, companies jump in to either poach the customer from its competitor or to retain them with a better phone on offer with the network. This, in turn, should indicate to Una the importance of maintaining touch points and keeping a close eye on measures to track customer status. In time, the same restaurant may be open to larger orders of her breads or to procuring her desserts as well. Her average bakery customer may do the same.

For B2B accounts, tools like Gainsight can assimilate all data on an account to reveal not only churn risks and upsell/renewal opportunities in play but also the overall account health in terms of onboarding, adoption and of course, the NPS:

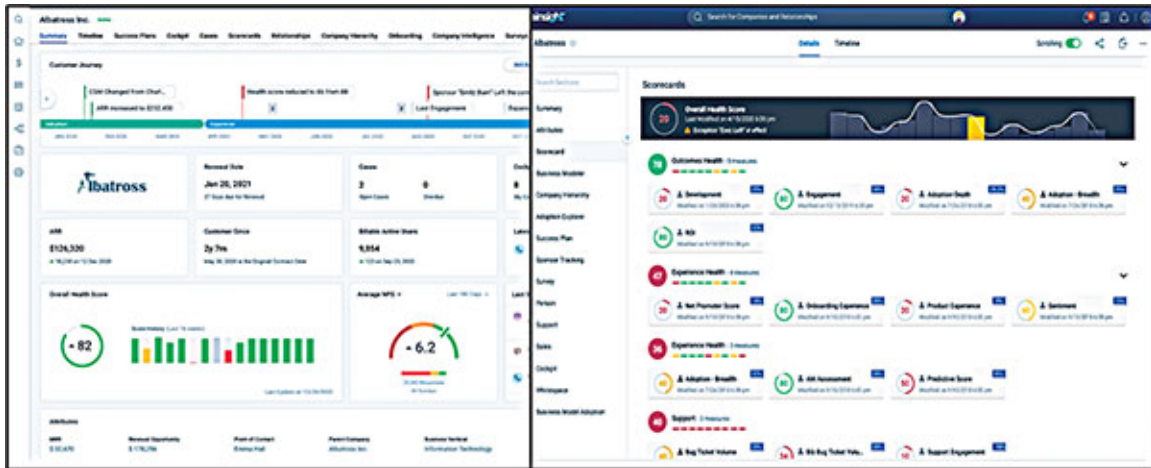


Figure 15.9: Gainsight dashboards (31)

### 15.4.3 Soliciting feedback and reviews

The third benefit and role that a brand's receptivity brings to a company's growth has to do with generating reviews. Some obvious reasons for it are: First, online reviews and testimonials can add to the brand credibility which can in turn influence new (and other existing) customers. Second, it can increase a brand's online visibility by adding to the chatter around it on websites or vertical aggregators for bots to catch. Third, it can allow customers to voice their opinion and be "listened to" by the brand, which is a crucial step to building loyalty by making the customers feel appreciated. But the reason that surpasses all these points is the role customer feedback plays in giving Una valuable insights she has waited so long for.

The insights we speak of here correspond to a validation of her original decisions around the brand identity, specifically the target market and the positioning. Those decisions have informed every action Una has taken since the beginning of her journey. But what if she missed something? Despite rigorous research, surveys and focus groups, the final cog in this wheel rests with customers who have now experienced Una's brand and have found it to reliably align (or not align) with what they desire. Without a perfect alignment between the brand and that elusive, invisible "desire", brand resonance is not possible.

Have the in-store customers taken to Una's idea of personalizing breads? Have there been enough orders to indicate strong future margins based on this

differentiation? Are the bulk of customers walking into Una's store simply looking there due to a convenient location, and would be fine even with lower quality bakes? Have there been sufficient cross-selling between Una's bakery product and her online classes, or are the two groups of customers entirely different? Have the orders increased in size or frequency by the existing customers? Have the restaurant managers Una has partnered with seen better customer appreciation for fresher breads? Or has Una targeted the wrong restaurants? What is it that Una's current set of customers are coming back to her for, if at all?

These are all questions that Una can now answer through her own use of analytics and more importantly, directly through the voice of the customer. It is not only a matter of dedicated focus groups with existing customers – not many may be ready to participate. Soliciting reviews, short videos, or written testimonials (even if on little post-it's on a fun-looking "*customer wall*" in the bakery), and feedback are all valuable ingredients to help paint the full picture.

Naturally, this step is where marketers can and should help, as they are the primary recipients of customer voice, from a brand journey perspective. Just the way the sales team has a supporting role to play in upselling and cross-selling, marketing has a role to play in dealing with customer opinions. Organizations may decide to have these teams play a supporting role to customer success, or vice versa. The procedure to get these opinions is the same as one followed for reviews and referrals, as are the tools, which have already been discussed earlier. Una can directly request the customer for it online or in-person or incentivize them with anything ranging from a sincere note of thanks to a more tangible value. At this moment, Una is eagled-eyed and hunting for the kind of epiphany the founders of Slack experienced in their gaming software. And she is about to stumble onto one.

## **15.5 Conclusion**

Brand receptivity is important because it helps build loyalty between your brand and its customers. After all, feeling heard and appreciated always makes people happy. It also opens up opportunities for more business from the customer and helps strengthen brand credibility through positive reviews. Often, it boils down to effectively managing issues. That is achieved by pacifying the customer and solving his problem in a way that he feels satisfied. These can be ensured by establishing proper training systems and culture that teach employees to represent the customer instead of the company first.

A brand can be made receptive by establishing certain processes and metrics that help track customer status regularly. While the process can be standardized to an extent, the metrics have to be chosen more carefully and focused on customer satisfaction. The NPS is a great way to find out where your customers stand with your brand. While such data centricity is important at every stage, in the receptivity stage, it has to be combined with subjective feedback. These two together offer cues for upsell or cross-sell opportunities for the company to increase repeat revenue from the same customer, besides directing the brand in its intended vs. actual direction.

Perhaps the greatest contribution of receptivity is in helping a brand achieve resonance. That is because receptive brands manage to meet two criteria:

- In analyzing customer feedback, they can validate original assumptions and understanding of the market-product fit and innate customer desires.
- In incorporating the customer feedback, they can make the customer feel he has a personal stake in the brand.

As we will see in the next chapter, these two elements are crucial to the stage of brand resonance.

## Questions

1. Which of the following are benefits of brand receptivity?
  - a. It can turn customers towards fandom.
  - b. It can result in changes to the brand positioning.
  - c. It can make the customer feel they have a personal stake in the brand.
  - d. It can pave the way for more revenue from the customer.
2. A brand bears the sole burden of managing customer relationships until the receptivity stage because the client has a ton of other priorities on his plate and has generally drifted off to other matters soon after engaging with the brand. That is also why getting to the resonance stage is important. Is this statement true or false?
3. Which of the following helps decide/plan the frequency of customer touch points?
  - a. Product/Service offering
  - b. Brand receptivity

- c. Operational feasibility
  - d. Client preference
4. A key to effective customer success is to train employees to represent the customer before the company. Is this statement true or false?
  5. A great measure for customer experience is the \_\_\_\_\_.
  6. On a scale of 1-10, those with a score of 5+ are Promoters. Is this statement true or false?
  7. In upselling, you sell more of the \_\_\_\_\_ products to the same customer while in cross-selling, you sell \_\_\_\_\_ products to the same customer.
  8. Cross-selling is at its most seamless only when they are both executed by a company under the same brand. Is this statement true or false?
  9. Which of the following are true about upsells and cross-sells?
    - a. They help increase revenue from the same customer.
    - b. They help add hooks to sustain longer customer relationships.
    - c. They help solicit positive feedback from the customer.
    - d. They are the natural next target for a sales team for a given customer.
  10. Brand receptivity is a stage that can have a direct impact on each of the other stages in a brand journey. Is this statement true or false?

## Answers

1. B, C, and D  
Receptivity can move customers towards loyalty, but it is resonance that takes them to fandom.
2. True
3. A, C, and D
4. True
5. Net Promoter Score
6. False  
9+ are promoters
7. Same, Different

8. False

While helpful, it is not the only way to make the cross-sell experience seamless. In fact, if there is no clear connection between two products, it can lead to confusion around the brand identity.

9. A and B

Upsells and cross-sells may be indicative of a willing customer but if at all, it is positive feedback that helps open such opportunities, and not vice versa. Also, while most sales are naturally directed to acquiring more or repeat business from a customer over time, any scope for upsells or cross-sells specifically can also depend on the nature of the product, market and the customer, and is not a given.

10. True

# CHAPTER 16

## Brand Resonance

Brand resonance is where the brand becomes a part of its customers. They start to identify a part of themselves with some aspect of the brand. They feel they have a personal stake in the brand and strongly defend and endorse it to others. There is almost a sense of pride in talking about the brand. That is tantamount to fandom. Think about the soccer fans and their passion for their teams!

Everything we have discussed around a brand has been somewhat “mechanical” in retrospect – clear actions that achieve clear outcomes, as customers move from one stage to another. Resonance, though, exists in the heart. How does a brand manage to truly get there? The receptivity stage starts to move a brand to more subjective considerations in its logical progress, but by the time it arrives at the doorstep of resonance, it enters the domain of sentiment. In this chapter, we look at how to achieve this elusive stage of resonance.

### Structure

In this chapter, we will discuss the following topics:

- Importance of resonance
- Una’s moment of truth
- Recipe for resonance
  - Create a cherished memory
  - Create a ritual
  - Create a resonant mission
  - Create a resonant personality
- Financial impact of brand equity

## **Objectives**

This chapter connects the dots to a brand achieving resonance with its customers in order to sustain its growth. By the end of this chapter, you will be able to understand how brand resonance helps drive customer loyalty, find out how Una sets her brand up to reach resonance, learn the ways to create a state of resonance among your customers towards your brand, and appreciate the financial value of the end goal – maximum brand equity.

### **16.1 Importance of resonance**

Maggi is an immensely popular brand in India, and is owned by the Swiss company Nestle. Their Maggi line spans a range of products – the most popular of which, for decades, has been their instant noodles. It was the undisputed market leader and like the Salesforce example discussed earlier in the book, it had spawned its own economy with tons of restaurants and street vendors selling Maggi noodles-based dishes. Then, in 2015, the product was completely banned for its alleged excessive use of chemicals. For five months, Maggi completely vanished from the shelves, leaving the door wide open for its competitors to take over with ample time in hand.

Over the decades before its ban, Maggi had built a resonance with generations of Indians who grew up licking off their bowls of Maggi noodles as a kid. When the ban was eventually lifted, Maggi came back to the shelves now stocked with competing brands its customers had resorted to. The executives in the company were bracing themselves for a long road back to recovering the former market share. To achieve that, they resorted to memories. They launched advertisements that heavily focused on reliving memories for its consumers who had enjoyed the noodles as a kid. Little did they know that the promotions may not have been needed at all, for the memories and brand resonance were so strong that customers had no hesitation switching to the brand the moment they saw it back on shelves. Within a year, Maggi noodles had sprung back to market leadership!

The difference between resonant fans and loyal customers is that the latter can be lured away. Listening to customers and ensuring that, at the very least, they get what they expect from the product or service can help retain customers and keep them loyal. The ease with which they can be lured away by competitors largely depends on the nature of the product. This is because



not all products serve the same need. Customers are more likely to get swayed by artistic variations in a product they consume for pleasure, and by functional enhancements in a product they consume for its function. For instance, despite Una's skills in the finer art of baking bread, a casual bread eater will also be susceptible to being drawn to another baker for a host of other reasons. His loyalty may simply be a matter of convenience, affordability or even just a habit of stopping by to pick up the bread somewhere else on his way home from office.

Resonance is needed to guarantee customers, come rain or shine. As we will see later in this chapter, resonance can be about growth or survivability. Generally, it ensures the former in good times and the latter in poorer times. But as any business that has faced a recession will testify, that is the best-case scenario a business can expect. So, before we find out how brands cross the chasm from loyalty to fandom, let us set the stage with Una's example.

## **16.2 Una's moment of truth**

What turns loyal customers into fans? The first step is to find the precise target audience who appreciates the benefits of Una's bread. We had started off with some level of assumptions and then refined it as we went along, based on real customer data. In assessing her customers' behavior, Una noticed that her website traffic tends to spike around midnight every day, oddly enough. Since she couldn't entirely explain this trend, she decided to add this question in her surveys.

In deciding who to send out the surveys to, Una started with the more affluent shoppers who came to her store, as well as the baking enthusiasts from her classes. Una's appeal to these two segments had become clear to her over the course of her brand journey. The former led her to also talk to her partner restaurant managers. The reviews were largely good, with few improvement areas popping up here and there, which she duly took note of. The only surprise, one she particularly appreciated, was that her store visitors were far more vocal about how they loved watching her and her colleagues' bake – something her own online students did not voice as much. It took her one-on-one conversations to discover that the fascination was with how her machinery churned the dough, and the beauty of watching the bakers sprinkle the sugar or personalize the breads, all under the regal glow of indirect

yellow lights. None of it, however, still explained the midnight interest in her business.

Una decided to talk to another group of her store customers – these were younger, even though neither baking enthusiasts nor affluent. Sure enough, the beauty of watching the desserts get baked topped their charts. But it was also these casual customers – who were neither very loyal so far nor identified as Una’s core target – who were also the ones looking for her bakery at odd hours.

Given the nearby clubs, fast food joints, and restaurants, these night owls usually craved Una’s desserts after visiting those other joints. More interesting to Una was that couples in particular found her bakery a great ending spot for a date night, given how mesmerizing and rich it felt to be entertained watching fresh baking in process with their partner. And of course, there was the convenience of treating their partner to Una’s little cookies with sweet messages!

The revelation brought Una to an opportunity that was knocking at her door – the potential to tap into an entirely new segment of audience without any effort, except remaining open at late hours. While the baking enthusiasts and the affluent were appreciating the valuable lessons and quality Una offered, it was this segment of untapped late-night visitors that Una was inadvertently creating precious memories and rituals for. If this were a race, the brand would surely reach resonance with the latter group first. In catering to this new audience, Una would be able to make her bakery an intimate part of her new customers’ lives and memories. All it needed was a little push and creativity at nurturing them and making their experience extra special. How Una would tweak her business model was up to her. Her task was now to ensure any change was sustainable in terms of capitalizing on the new business from potential fans while retaining her original group of loyalists.

Such multi-positioning is not new. Consider *Tim Hortons*, a café chain in Canada popular for giving generations of Canadians their morning start to a workday with its doughnuts and coffee. While it is positioned firmly in Canadian culture as the budget-friendly neighborhood café, it opened its first store in Dubai in 2011 on the posh end of the city’s *Sheikh Zayed Road*, (1), and was flooded by nostalgic Canadian expatriates. They were possibly the company’s initial target market in Dubai, but ones that also fell on the higher end of the wealth spectrum there. Over the years, *Tim Hortons* has retained

its promise of value pricing but understands that there is a difference in how it is perceived and therefore, consumed. As a result, while it enjoys the lion's share of the Canadian coffee market (2) with its 'local favorite' position in the country, it has prospered with its 'expat' positioning on the other side of the world – so much that the café even offered a \$870 five-course meal on New Year's Eve, (3) complete with a premium seating by the water to enjoy the fireworks at Burj Khalifa!

## **16.3 Recipe for resonance**

So, what turns loyal customers into fans? It is the intimacy a brand manages to create with them. And that usually happens in one of four ways:

- Creating a cherished memory
- Creating a cherished ritual
- Creating a resonant mission
- Creating a resonant personality

### **16.3.1 Create a cherished memory**

Una enabling a couple's first date night would be a classic example here. A more proven case belongs to Maggi as seen earlier, as well as the example of Pepsi vs. Coke we saw under consumer neuroscience. Remember that corner ice cream shop your parents used to take you to every Sunday! That is a sweet memory-induced resonance with that shop, if it still exists. That last choice of words is where the caveat is. Memory-based resonance often capitalizes on nostalgia and that always occurs in the future. A memory, by definition, corresponds to a brand experience that occurred in the past. In effect, memory-based resonance poses a few issues:

- It is difficult to create or control.
- It cannot always be planned, as we do not know which moments or experiences will stick in the minds of the customers in the future.
- It takes time to build as memories cannot be established in the present.

Despite these challenges, many brands do try to create memories. Disney and Lego would be great examples of brands that resonate on the power of memories its former customers (parents) have and pass on to current or future

customers (children). Children experience Disney characters and content because they are trusted to be safe and reliable experiences for kids by their parents. The same is with the choice of buying Lego toys for the kids. Likewise, while a kid may only wish to visit Disney World, it is the parents who remember, understand, and resonate with the experience and its value for the kids.

The preceding examples also indicate how memories are generally the way to go for brands that have been around long enough to have created those for its customers (current or former). But surely, there are ways to enable resonance in the present? As it turns out, yes there are.

### **16.3.2 Create a ritual**

Unlike memories, rituals exist in the present and can be created here and now. But they, too, take time and repetitive conditioning to form. Going back to the example of childhood family visits to the ice cream shop, that was a ritual. Over time, it turned into a cherished memory as you grew older, but during the years when it was happening, its value was ritualistic. We read earlier about Coca Cola's strong memory-induced resonance. But "*ritual*" is something the company has intentionally tried to create with all its advertisements that show Coke as a great family drink to cheer with during Christmas, or even every time one orders pizza. Heineken, meanwhile, has focused on creating a ritual linking the consumption of its beer to soccer games.

Rituals correlate with and directly leverage memories. Once formed, rituals are very tough to break, as situations feel almost incomplete unless all the ritual's components are present for an individual. That is the reason they work so well. Imagine a romantic dinner without candle lights or wine. Picture yourself visiting Venice without riding on its Gondolas at all.

Creating a ritual, similar to other resonance techniques, will require Una to think about her positioning and target customers too. It could be a ritual ranging from birthdays-only to every late night. Creativity abounds. Una's job, though, is not to force rituals on her customers but to tap into indications from the customers themselves on what has potential to become a regular thing, and to encourage it and make it more special. A slow process, but one with returns in the present time.

Since it is not possible for every brand to create a ritual or memory with its customers one-on-one in person, online channels often help. But even that can be a slow process. Both rituals and memories take time to be truly appreciated. If neither is possible, this is when brands focus on creating an emotional association to themselves by appealing to the customer's innate or desired personality or values, which is quicker.

### **16.3.3 Create a resonant mission**

Japan, the land of the rising sun, may as well be called the land of centuries-old businesses. The country boasts 40% of the world's known businesses that are over 100 years old, with 19 operating since the first millennium! (4). Those are 19 organizations that have survived much worse than the pandemic we are facing today, in sharp contrast to the tens of thousands that have gone bankrupt due to Covid-19. If the objective behind achieving brand resonance is a certain sense of immortality, then surely there are no better examples than these Japanese legends. What is their secret?

A New York Times article that covered this story was very clear in that these businesses have certain common themes:

- They believe in doing one thing really well.
- They believe in tradition and stability over unending profits.
- They have a strong, clear mission that drives them each day.

The first point aligns with what we discussed during the brand identity formulation. A strong, clear positioning can only be built to satisfy a specific need or desire of a specific target customer. The clearer that focus is, the easier to achieve resonance with that target. That level of specificity, though, can also limit a business' growth and market share. We recommended ensuring a balance here. For the Japanese, the choice seems to be very clear though.

Contrary to the implied and assumed objective of a business looking to survive, the millennia-old businesses are generally not chasing continual profits over a focused value. For instance, one of the shops covered in the article has only ever sold one product: rice flour cakes. Each shop owner's aim is to successfully pass over the reins of the shop to the next generation. That makes them more risk averse, which results in greater weightage given

to increasing cash reserves versus debt or investment. But as we know, that can keep the size of the business limited. So, what's the point? That is where the drive comes in.

The particular shop mentioned earlier was opened to serve the tired pilgrims visiting a neighboring shrine. In that mission, the owners haven't flinched. It is a mission tied to a constant stream of a very real need day in and day out. And it's one every visiting customer, exhausted and starving, can resonate with.

A clear and resonant goal to work towards is one of the strongest ways to build resonance quickly. That is why almost all companies have a mission and vision statement on their websites today. Yet, few employees at these companies ever remember these. These statements are carefully thought out and worded impeccably and reflect what a company wants to believe in and work towards. They are strong and important, and yet, they may not resonate. The difference between a strong and resonant mission is that the latter is authentic and truly matters to the target customer. And like with everything that deals with resonance, authenticity cannot be made up.

Mission is the route most non-profits, politicians, and historical leaders have gone with in garnering support for their cause. It is because it's powerful, immediately recognizable, and easily understood. A mission-based resonance can be quick to yield results but for all its benefits, it has certain limitations too:

- It is often temporary. Once the mission is achieved, the resonance may not hold.
- It is also not always linked to a value that focuses on increasing profits, as seen in the preceding example.
- It is also very difficult to create artificially.

That is where we come to the fourth option of facilitating resonance – one that is quicker and also often without a time stamp.

### **16.3.4 Create a resonant personality**

You may find some of those holding a cup of Starbucks do so with a very subtle sense of pride that other coffee drinkers won't. Similar has been the case with iPhones. It's because Starbucks appears to reflect the good taste

and an eye for quality for its customers, and iPhones appear to reflect how cool the customers are.

Which emotion or unmet need a brand decides to appeal to depends on its own identity and its target, but it must adhere to it consistently. That emotion also needs to be endorsed by existing customers to those who are not. Ideally, the former should do it on their own, but the brand can certainly facilitate it. If I could bake a bread with my name on it, or someone gifted one to me, I would certainly feel compelled to share its picture with my friends. Una's job is to ensure that I like her and feel gratitude for her teaching me how to do this, so that I credit her. For her affluent customers, the more Una emphasizes and educates them on the details of her fine bread, the more they are enabled to express it as a reflection of their good taste. Soon enough, they will also come to associate a restaurant carrying Una's bread with high quality. And that is how Una will start to get a better negotiating power with the restaurant managers.

In B2B too, such word-of-mouth works, though on a different level. There are a few brands that executives almost feel a sense of pride in using and talking about, even if it's mainly to reflect how tech savvy they are. Think about Blackberry phones in their heyday. In B2B, a little more push may be needed. For instance, it can be delivered with a subtle hook or feeling where customers may feel intelligent in talking about you – either because they are the first movers on a newly discovered way of doing something, or because you have educated them to be able to explain the differentiation of doing something your way versus the traditional way and therefore, appear to be in the know.

Each of these are ways to appeal to one's personality. They are quicker in terms of impact and are long-lasting as one's personality does not change every day. However, when done right, they also result in one of the strongest forms of resonance. Harley Davidson and American Girl are cases in point. They thrive because they tie themselves to their customer's identities and are preserved by them, as nothing makes a person feel more insecure and turn protective as a potential threat to his or her identity does. Personality-based resonance has led Apple to become the world's most valuable brand – something no other technique can boast of.

A feeling of exclusivity goes a long way in enriching resonance. This is why many companies have exclusive groups that are invitation-only. Think about the American Express Centurion Cards (the Amex Black Cards) which are invitation-only. Being a holder is an instant matter of prestige, one that the customer would not easily let go of. Is this resonance? Yes and no. The exclusivity certainly elicits a form of loyalty in its members and makes them appreciate the recognition. But for true brand resonance, Amex will have to invariably make them feel individually special in a way that other credit card brands may not. Otherwise, the customer may be willing to jump to another exclusive credit card from a competing brand.

As mentioned earlier, the trick to resonance is to meet the specific unmet need or desire of the customer. It all boils down to uncovering that need or desire in an unbiased manner. As we learnt in the chapter on sales and then in customer success, uncovering this need or desire can take asking the right questions and listening more. This is why both sales and customer success become so crucial to helping marketers achieve brand resonance. So, for any company that sees and treats these functions in silos, think about the opportunity they have been missing out on. In fact, for any marketer who has happily strayed away from the other two functions, think about how limited his effectiveness may be in comparison to what they could be.

## **16.4 Financial impact of brand equity**

Sports is an arena where passion runs strong. Clubs thrive on their ability to gain and resonate with fans. In this industry, fans can be gained for a host of reasons and with varying degrees of effort involved. Local supporters can join simply on account of the team being located in the neighborhood. Global fans are likely to come as a result of a string of successes and having an asset (that is, player) that those supporters are fans of. For such teams, resonance does not necessarily come with fandom. In fact, there can be quite a disconnect if the brand's core promise does not hold true.

Arsenal, the North London football club – one of the biggest in Europe – found this the hard way when a significant bunch of its supporters turned on the management in the absence of trophies and an apparent lack of investment in match-winning players for a number of years. Arsenal's marketing team had been one of the most successful in the world, having amassed a vast pool



of global supporters or “*fans*” with strategic presence and partnerships. But while that marketing effort showed results on Arsenal’s books in terms of attendance and merchandise sales, it failed to reflect the resonance levels. These supporters had committed to the club on account of an implied promise of success that a “*big club*” ensures, which is often defined by trophies. So, when the club performance failed to meet it, these fans turned on the club with regular protests.

Exciting football and trophies need not be the default promise of a soccer club. If that were so, the likes of Manchester City and Liverpool would have lost fans many years – even decades – before they won their recent Premier League championships. And smaller clubs would have no fans at all. The point of the story is that resonance rests in the heart and can come for far more obscure reasons than financial or industrial performance. And a brand should never confuse the temporary fans from sustainable ones. The former can create a smokescreen of high brand equity showing on the financial books, which is not bad for short-term growth but does not help create long-term value.

Brand resonance is not the prerogative of only the customer-oriented functions in a company. It is equally of interest from a purely financial perspective that goes beyond simply customer acquisition and retention. Think about how it helped Maggi noodles tackle a complete absence from one of its largest markets to become a leader again or how it helps Tim Horton’s command a premium despite its value pricing position.

In leading a brand to the stage of resonance, Una has also effectively created an asset, measured by Brand Equity. If you’d recall, it is the measure of the value of a brand. To put it simply, it is equal to the additional monetary value that a customer associates to breads that are baked by Una, just because of their brand. That can be directly proportional to the enhanced sensory pleasure that customers experience and acknowledge when having Una’s bread. And that pleasure is part fact, part perception. True, the initial understanding and taste of Una’s bread lends the first impression of high quality, but as a brand gradually approaches resonance, the customers at that stage as well as those around them start to build a fixation around that perception. That results in Una’s breads tasting better even in comparison to another more flavorful bread. Improvement in the brand equity makes a tremendous difference at the time of asset valuation.

Recalling the comment on Una's exit strategy, whether in partnership, merger, or acquisition, Una's returns or share will be directly influenced by her assets. For a truly resonant brand, the asset value is exponentially increased. In other words, building brand equity is Una's way of increasing the valuation of her hard work - her breads and desserts. If she is really good at something, branding helps her maximize its value.

That brings us to the end of our brand journey. The business, the brand, the consumer – Una has merged these into one entity, intertwined with its own connected ecosystem. The brand could be her personal brand or her company's. Depending on the choices she has made along the way, she may as well have made them synonymous with each other. Her only learning curve now remains the nuances of specific new technologies that she decides to bring in to help her operationally. But she can feel secure with the fundamental pillars of the brand journey in place.

## **16.5 Conclusion**

Brand resonance is the state of maximum brand equity, a stage at which loyal customers become fans and are nearly ensured of staying with a brand over time. That is because in this stage, customers begin to have a personal stake in the brand. That intimacy is difficult to part with.

There are several ways in which resonance can be achieved, but in every case, it is best achieved with focus and adherence to the brand positioning that perfectly meets the specific desires of a specific target audience. A brand's task is to balance such specificity with a target market big enough to sustainably grow – or survive. Brands can achieve resonance by creating a cherished memory or ritual. The latter can be quicker to create than the former. However, the more immediate ways to achieve resonance are to create a mission or personality that resonates with the target audience; both require a thorough understanding of the chosen target audience.

Brand resonance is an important ongoing consideration because increasing the brand equity has a direct impact on a company's financials – both its revenues and its valuation in the event of investment, merger, or acquisition. But organizational impact aside, what remains now is for us to decipher the personal impact. How much impact can the use of modern-day tools in a brand journey have on those who execute it? That pertains to a question everyone is asking today. Given its abilities, how will AI impact jobs in

marketing, sales, and customer success? Is there a way – a formula – that can help answer that? That will be our focus in the last chapter.

## Questions

1. Brand resonance is the state of maximum \_\_\_\_\_.
2. The difference between fans and loyal customers is that \_\_\_\_\_ can be lured away.
3. Brand resonance is needed to ensure survivability before growth, even though it can help both. Is this statement true or false?
4. Which of these can help build brand resonance:
  - a. Imparting a feeling of exclusivity to the customer.
  - b. Meeting an unmet need or desire for the customer.
  - c. Reaffirming a customer's choice in a brand through relevant success stories.
  - d. Creating a sense of pride in the customer in associating with the brand.
5. Intimacy with a brand can be created in which of the following ways:
  - a. Turning customer loyal
  - b. Creating a cherished ritual
  - c. Creating a cherished memory
  - d. Procuring readymade fans, as in case of sports teams
6. Which two of the following ways are quicker to build brand resonance:
  - a. Creating a cherished memory
  - b. Creating a cherished ritual
  - c. Creating a resonant mission
  - d. Creating a resonant personality
7. Which two of the following ways generally lead to stronger brand resonance levels?
  - a. Creating a cherished memory
  - b. Creating a cherished ritual

- c. Creating a resonant mission
  - d. Creating a resonant personality
8. In terms of the time taken by the following ways, what is the order in which they can usually be accomplished by brands looking to achieve resonance:
- a. Creating a cherished memory
  - b. Creating a cherished ritual
  - c. Creating a resonant mission
  - d. Creating a resonant personality
9. Memories are different from other techniques to achieve resonance in that they cannot be created in the present, nor can they always be pre-planned or controlled. Is this statement true or false?
10. Missions are different from other techniques to achieve resonance in that they can often be temporary and not oriented towards sustaining increased profits. Is this statement true or false?
11. Brand resonance should be the focus only for the customer-oriented functions in a company. Is this statement true or false?

## Answers

- 1. Brand Equity
- 2. Loyal customers
- 3. True
- 4. A, B, C, and D
- 5. B and C
- 6. C and D
- 7. A and C
- 8.  $C > D > B > A$
- 9. True
- 10. True
- 11. False

Brand resonance is equally of interest to, say, human resource looking for passionate employees, or finance looking to weigh in the financial risk in case of a recession.

# CHAPTER 17

## How to Prepare for the AI Era

A brand journey is an inevitable part of any entity – individual or organization. Any person you or an institution interacts with will form a perception, harbor a feeling, and make a choice. This is a journey because brands can go both up and down a customer’s priority and preference list. It is important because it reflects the subjective reality of how each one of us makes decisions about something and because that rarely ever reflects on a company’s financials directly and immediately.

Understanding the brand journey helps us understand what we are trying to achieve, and which initiatives to take and when. The depth of psychology it operates in is one of the main reasons why AI solutions have become so important to its successful execution. But the more AI advances, the better it can do things humans used to do previously. That is true of any new technology. In this chapter, we will recap the brand journey before formulating how you can reduce the level of risk AI faces to a particular job at any particular time, now or in the future.

### Structure

In this chapter, we will discuss the following topics:

- Recap of the brand journey
- The impact of AI on jobs in marketing, sales, and customer success
  - AI job threat assessment
  - Status of current jobs in the AI era
- Final words

### Objectives

This chapter draws our attention to the impact of AI not only on the field of marketing, sales and customer success but also on us personally, as a result. By the end of this chapter, you will be able to recall the highlights of the brand journey discussed in this book, understand where AI is at and where it is headed, learn how to gauge the threat to any particular job due to AI at a given time, determine the threat to some of the current jobs due to AI, and take away an action step to get ahead of the AI era.

## **17.1 Recap of the brand journey**

Let's do a quick recap of all that we have learned so far. We began with an understanding of what a brand journey looks like. The objective is always to increase the brand equity: the perceived additional value one attaches to something because of its brand. Brand equity is maximized when brand resonance is achieved - a state where the brand "*can do nothing wrong*". That state should be valid for the majority of target customers. Ideally, this majority is a robust, growing population that only requires a company to maintain its brand identity in order to command its fandom. But to reach this point requires marketing, sales, and customer success to come together.

Brand is a natural association that accompanies any individual, product, or service, which is why a clear brand identity is an essential first step. We create it by following a two-tiered strategy. Tier I strategy sees us segment our potential customers and decide who to target. The latter is informed by the segments that will most appreciate our differentiation. How we differentiate ourselves in a given category for our specific target segment defines our brand positioning. That positioning guides our Tier II strategy where we finalize the form and nature of our product that will best reflect the positioning and facilitate its adoption by the target customers. It also determines the pricing, the channels, and the promotion style and content. Once again, brand equity can help improve price elasticity, allowing Una to raise the ceiling.

The first customer-facing stage of a brand journey is building awareness, to a point where customers can easily recognize it and can even recall the brand at other times. Both must be in a positive manner though. Websites, SEO, social media channels, and vertical aggregators are all platforms that prove useful here. Once established, Una can aim to start leveraging basic awards or recognitions as well as online or virtual ads.

All of this information, and more yet to come, goes into a central system or database that serves as the backbone of our technology stack. And that brings us to look at our operational alignment and automation. Brand operations help apply best practices and set procedures to the activities in these functions, measure and keep track of their performance and effectiveness, and manage the technology stack in place to support these functions. Besides the central system – usually a CRM – operations also deal with software customizations, appropriate insights reporting, utilizing advanced or supporting tech, careful stack planning to avoid stack fatigue, performance measurement of the tools and the people, and of course, avoiding the misuse of technology.

Establishing credibility among those who are aware of a brand comes next. Trustworthiness is best achieved by associating with entities that the target audience already trusts. These include bloggers, influencers, media and popular recognitions, to name a few, often covered under a branch called influencer marketing. Trust is also delivered by credible and reassuring experiences. For instance, a smooth, professional, and rich website experience, coupled with connected channels with equally robust content, will always leave the visitor with a perception of having encountered a brand worth its salt.

Trusting individuals are ready to engage with a brand. Your job is to make sure that process is as smooth as possible, directly or indirectly. The latter generally implies leveraging channels where the customers may visit you, which generally falls under the purview of channel marketing. Channels are also essential to connect your ecosystem with other ecosystems that the target customers inhabit. It can take creativity to find the right partners. Some things to consider on the way are the business and customer location or presence, the type and mode of product/service offering, complementarity (of the offering, business, customers, or goals), the target customer group, the non-target customer group with collateral benefits, the business vision or growth objectives, and the assets available to the company that can be useful to other parties. Affiliate marketing is another growing stream that allows companies to generate leads through promoters called affiliates.

B2B customers in particular require extended selling cycles which in turn require careful conversational approach and information gathering. The former dictates that we warm the buyer into the conversation to help him or



her share their problem and dig deeper to realize the underlying need and its potential impact. The discussions should also allow us to retrieve information that helps us qualify the buyer based on their fit and readiness, understand the buyer's motivations and purchase process, and our odds at winning the deal.

Nurturing your customers into loyal fans stems from their first experience with the brand as a customer. This starts with their onboarding process and interactions. The customer wants to first understand the value of your product and how to use it, recognize how and when they can expect to get returns on their investment, and feel like they can trust you or your company to handle all their needs efficiently and effectively. Doing this well can help you build a relationship with them while allowing them to buy into your product value. A planned and strategic onboarding process, ideally one that is milestone-based, can make this an easy and user-friendly process. It also has an added advantage of preparing customers for future referrals, managed under Referral Marketing. Perhaps most importantly, this stage allows modern-era organizations to start leveraging consumer neuroscience to begin factually establishing what works with the consumer and what doesn't when it comes to the brand – especially since many of the gadgets used today in this field require willing participants.

Once the customer has been onboarded, it's time to build loyalty and this comes from brand receptivity, that is, ability to make the customer feel heard. A Net Promoter Score is a great indicator of loyalty, based on the customers' inclination to refer you to their friends or colleagues. This can be achieved successfully by having a proper communication schedule with your client in place. The touch points are usually based on operational feasibility, client preference, and product. Occasional customer satisfaction surveys with strategic questions can help you learn how happy they are or where you can improve, all of which can help reduce customer churn risks, create upselling or cross-selling opportunities, and get valuable insights to get to the next stage.

Loyal customers are primed to become fans if our branding foundations have been solid, and if marketing, sales, and customer success have been working as a well-oiled machine. This conversion is needed because loyal fans may still be lured away by a competitor, but fans won't. Brand resonance is a matter of the intimacy a brand manages to create with someone. And that

usually happens in one of four ways: creating a cherished ritual, creating a cherished memory, creating a resonant mission, or creating a resonant personality for the brand. The idea is to exclusively meet a specific unmet need or desire of the customer. A state of resonance will have allowed a brand to maximize its equity and therefore realize the highest value possible, which can have tremendous impact on the company's present valuation and future survivability.

## **17.2 Impact of AI on jobs in marketing, sales, and customer success**

All through the brand journey, we discussed the innumerable software options that are available today. With a tool to aid or execute just about every task in marketing, sales, or customer success, AI is also shaping the way we do our jobs. If data collection and analysis is overtaken by AI in a 24X7 role, what remains is acting on that analysis. AI is making inroads there as well, with its capability to hold a conversation with the customer or create social media content. But it's still very rough at the edges for now. Yet, what does that mean for the future of these jobs?

With more and more of marketers' and sellers' tasks getting automated, the natural question is how long it would take for the entire function to become completely AI-driven. In other words, can AI replace marketing, sales, and customer success jobs – as we know them – anytime soon?

To reiterate the growing importance of AI from the first section, the technology is sought after because it can analyze far larger volumes of data to uncover truly relevant and hidden insights and perform certain tasks both quicker and cheaper than we manually can. In many cases, we as customers even demand it from a company. Our expectation of Netflix to provide us with good movie recommendations is one such example. Our expectation of customer service to have all historical purchase information and to process our issues or requests quickly and without much hassle is another. For all our discomfort with the idea of being profiled or monitored, we strongly appreciate and lean towards companies that provide us with seamless, hassle-free experiences. In doing so, we only serve to further the cause of AI.

AI's proliferation, coupled to its obvious business benefits, is why the World Economic Forum predicted that by 2025, humans may conduct only 48% of

the current workforce tasks. In other words, machines may do more of the currently existing tasks than humans. (1) The report also stated, however, that 58 million net new jobs would be created in the next five years. Of course, that was in the pre-Covid climate. The key to note here is that AI's impact on jobs of the future is similar to the impact other technologies have had since inception: take over some of the old ones and create new ones. Think about the job of typewriters that were replaced by computers. The overall disruption is measured by how well balanced the replacement of old human-driven jobs with new ones is. And that is where AI departs from the norm.

There are three questions to answer:

- How quickly will AI replace the current jobs?
- Which current jobs will AI replace?
- Which new jobs will AI create for humans?

In order to predict AI's impact on jobs, there is one more thing to understand: the difference between Narrow AI and General AI. What most of us assume AI to be is the latter – a software program that operates in different contexts just as well as humans can. However, most AI today really is the former – a software program designed to perform specific tasks under specific situations. To put in context, imagine talking to Alexa or Google Home or Siri. Today, they can reliably understand and act only on relatively straightforward commands, but begin to falter at the inclusion of sentiment, sarcasm, or humor in what we say. This is why “*Play something romantic on Spotify*” is more likely to give us the song “*Something*” by Romantica versus a romantic playlist. The more advanced AI gets, the more it moves towards General AI capability, also defined by Singularity or the state when machine intelligence surpasses human intelligence. *Ray Kurzweil*, American futurist, predicts that we'll reach that stage by 2045. (2) He also talks about AI's likelihood of meeting human intelligence much sooner by 2029. That should address the first question of how much progressively AI will replace the current human jobs.

Coming to the next one: how to identify which jobs will AI take over? The “formula” has to be adapted to AI's evolution. In its current state, it relies on the fact that what most AI organizations implement at work is Narrow AI. That means we have to remember that it is specific tasks within a job that an AI model is created to replace. The risk to a job, therefore, is determined by

how many tasks within that job can be reliably performed by AI. With that in mind, there is a two-step approach we need to undertake, with each step answering two questions. This is the AI Job Threat Assessment.

## **17.2.1 AI job threat assessment**

As you go through the following four questions, think about the primary tasks that are critical to your job in question.

In the first step, for her customer-facing tasks, Una would answer the following questions to decide if she should consider AI tools:

1. **Are these tasks rule-based?** In other words, are these tasks performed as per certain specific predefined rules?
2. **Do these tasks deal with predictable situations?** As mentioned earlier, an unpredictable command can throw Alexa off. How many of such unpredictable situations can crop up while performing those tasks?

From a job security perspective, the ideal state is for both answers to be a “no”. The degree of security a job has depends on how many tasks handled by it are not rule-based or dealing with predictable situations. Some examples of tasks that are threatened in this regard would include data entry in CRM, lead sourcing and reach outs, follow-up emails, prospect/candidate qualification, expense audits, market investment, and forecasting.

In the second step, Una would now answer the following questions:

1. **Do these tasks involve critical decision making?** It is certainly more acceptable if AI played the wrong song on Spotify than if it misdiagnosed a patient. In Una’s case, predicting future cash flow to plan near-term investments may be more critical at one point of time than another. Decisions that are critical to business would need human intervention and supervision even if AI becomes accurate in its tasks.
2. **Do the tasks require intuition or sentiment?** This is more of a grey area. If a robot is sent in to negotiate terms in a hostage situation, even the most logical conversationalist can backfire horribly. Having said that, robots are being employed to act as nurses that can keep seniors company in old age homes! (3). In Una’s case, a basic situation would be responding to customer complaints online.

From a job security perspective, the ideal state is for both answers to be a “yes”. The degree of security a job has depends on how many tasks handled by it involve critical decision making and intuition or sentiment. Some examples of tasks that comply with these conditions include persuasion/negotiation with a buyer, hiring/letting go, personal assistants, influencer marketing, customer success, or forecasting in the Covid era.

## 17.2.2 Status of current jobs in the AI era

Where do some of the more common current jobs fall on this scale that may impact the kind of roles Una hires for as her business grows?

Based on the parameters we saw in the AI job threat assessment, on one side we have the jobs of email marketers, sales business development representatives (BDR’s), SEO specialists, content manager, social media marketer, and even some market researchers – all of which are being taken over by AI to an extent that the remaining tasks can well be performed by other roles. The managerial roles of channel, brand, and product marketing is next in line along with, believe it or not, the role of a marketing board advisor. The task of looking at the facts of company and market performance and recommending a strategic direction with an eye on financial value can be automated to a large extent. The entire board won’t be replaced by AI, but seats within the team could. Hong Kong-based **Deep Knowledge Ventures (DKV)** not only gave an AI algorithm, Vital, a seat on its board but also credited it with pulling the company back from the brink of bankruptcy. (4).

The traditional sales, marketing, and PR managers are safer, given their multi-tasking or people-oriented roles. CMOs fall in the same bucket, but neither look as safe as the VPs of marketing, who occupy a perfectly balanced executive position while being accountable for the execution of strategies. Accompanying them are influencers since people are less likely to “follow” a robot than a human influencer. And joining the list are personal assistants – because executives are also less likely to have a robot manage their schedules and priorities without any room for contextual judgments.

It is easy to see how the rules of AI-human work tug-of-war are defined by parameters quite different from hierarchy or pay. Instead, it has to do with the parameters discussed earlier, including how personable or critical the tasks are to us on a human (and organizational) level. But as mentioned earlier, the

odds are continuously changing as AI evolves. The AI job threat assessment is a handy tool to keep checking AI's threat level to a job from time to time. To try this assessment yourself, you can check out the online calculator at **[AIJobRiskCalculator.com](http://AIJobRiskCalculator.com)**.

Of course, to remedy a growing risk of AI to your job, you first need to understand what AI is, how to use it, and what its latest developments are. While new technology threatens existing systems, it also offers a once-in-generations opportunity for first movers to lead in the new system. For marketers, the choice today is between being the one that an AI system replaces, or the one who an organization looks towards to manage that new AI system. That was the genesis of the AI management series when we first took it up, and the focus of its first book: *Artificial Intelligence for Managers*. This book is the third instalment in the series.

An understanding and awareness of AI tools – without getting into the coding aspects of it – will help you arrive at the answer to the third question: which new jobs will AI create?

## **17.3 Final words**

Any function, once it becomes complex with expanding human knowledge, inevitably requires its own set of specialists. However, an organization cannot let that distract it from the big picture – the entire cycle that leads to happy customers and allows the organization to maximize its worth, responsibly. This is why the co-existence and co-dependence of the three functions of marketing, sales, and customer success with regards to the overall journey a company undertakes with its brand is so important for you to understand. Only then can you be truly effective in your objective at work and assume some level of leadership in guiding the company in the right direction. This knowledge is also what allows you to be ready to lead your own journey as an entrepreneur. What you need is to adapt to the present times and if possible, envision where we are headed so that you can prepare and get ahead.

With that, our job is now done. Thank you for having accompanied Una through this process. Hopefully, you now have a better appreciation of how to become a brand that people love, and how marketing, sales, and customer success work to help achieve that. Any information you may need to execute

the specifics of a brand journey is just a search away. We would be more than happy to answer your questions or to guide you at any time in supporting the journey in your company. If you would like to master your technology readiness to automate and manage brand journeys with high tech software out there, you can check out the first book in the series: *Artificial Intelligence for Managers*. It can serve as an excellent way to help you differentiate and position your personal brand as future-ready, career wise.

You can also visit us at [TheUpadhyays.com](http://TheUpadhyays.com) to find other helpful material or to connect with us.

Wish you the very best for your future. Stay happy and stay productive.

## Questions

1. AI is unique and unprecedented in being a technology automating jobs or replacing human workers. Is this statement true or false?
2. The prediction that by 2025, humans will conduct only 48% of the current workforce tasks means that 52% of the workforce in 2025 will be AI. Is this statement true or false?
3. General AI is a state where AI can understand and operate in different contexts, just the way our intelligence allows us to do. According to one prediction, it may be a reality in \_\_\_\_\_.
4. Most AI tools in use today is \_\_\_\_\_, which is designed to perform specific tasks versus operate with human-level intelligence.
5. Which of these indicate a job is at risk with current AI technologies:
  - a. It primarily involves tasks that are rule-based.
  - b. It primarily involves tasks that deal with predictable situations.
  - c. It primarily involves critical decision making.
  - d. It primarily involves the use of intuition or sentiment.

## Answers

1. False

Technologies are built to make a task easier to accomplish, and in that, they often replace manual labor. The degree of disruption depends on

how many jobs the new technology creates versus removes.

2. False

The prediction refers to current jobs and does not take into account jobs that will be created by 2025.

3. 2045

4. Narrow AI

5. A and B



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