



Marketing Wisdom for 2004: 99 Marketers & Agencies Share Real-Life Tips

by The Readers of MarketingSherpa

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Table of Contents

- Introduction: This year’s all about “in-person” marketing 6
- Part I: Real-life Campaign Stories 8
- Part II: Words of Wisdom on Marketing Tactics 23
- Part III: Office Politics, Teamwork, & Your Career 35
- Part IV: Business Building Advice for Marketing Consultants & Agencies 42
- About MarketingSherpa 49

Table of Contributors by first name with quote numbers

Alex Bernstein 85	David Smyth 24
Allan Sabo 3	Debbie Weil 50
Amy Kinney 82	Dee Merica Introduction
Anonymous 46	Dmitri Buterin 97
Anonymous 48	Donna Bowling 74
Anonymous 71	Ed Gazvoda 31
Anthony Sanchez Sr. 78	Ed Kohler 40
Arlene Rosen 58	Frank Grasso 44
Barbara Burbidge 99	Gail Howard 67
Bill Muller 30	Geoff Walker 39
Bob Floyd 21	Greg Jarboe 86
Bobby Burton 45	Halley Suitt 28
Brad Forsythe 68	Harry Hoover 95
Brian Carroll 54	Howard Goldberg 51
Carl Brown 14	Ivan Vega R. 96
Carlos Ladaria 25	Jana Gauvey 60
Carol Ann Waugh 64	Jason Ciment 36
Catherine Bracken 55	Jason Summerfield 43
Chris Boothe 63	Jeff Molander 53
Chuck Lennon 37	Jessica Albon 66
Corrine Solomon 76	Jim Crocker 84
Cory Whitehead 16	Joan Huyser-Honig 57
Curt Tueffert 26	John Girard 65
Dan Regan 89	John Taylor 12
Dave Etienne 10	Josh Aston 72
David Berkowitz 38	Julie and Colin 70
David Miller 9	Karen Gordon Goldfarb 91

Katherine Smith	8	Randy Weeks	93
Katherine Smith	83	Richard A. Rogers	69
Kent The Designer Nasstrom	15	Riggs Eckelberry	4
Kerry Colligan	32	Robert Peterson	20
Kevin W. Mahon	59	Roberta Carlton	18
Larry Brezenoff	61	Rod Balson	56
Larry Shiller	1	Ron Ragan	27
Linda C. Haneborg	80	Rose Valenti	75
Lynn Wheatcraft	19	Roy Young	81
Mario Pagnoni	13	Sally Saville Hodge	90
Mark Burris	94	Sally Stewart	22
Mark Carson	41	Scott A.	77
Mark Naples	87	Shawn Collins	52
Marlene Jensen	29	Sue Duris	2
Mary Beth Ellis	35	Susan Bratton	47
Matt Monarski	34	Susan Murad	23
Michael Beresford	6	Teri Ann Helfrich	79
Niall Booth	7	Terry White	11
Olivia Swinehart	88	Tim Smith	17
Paul Chaney	5	Tom Ranseen	62
Paul Jamieson	33	Tom Watkins	98
Peter Altschuler	92	Will Rowan	49
Philippe Borremans	73	William Siebler	42

Table of Companies with quote numbers

1-800 CONTACTS	72	Bonasource Inc.	97
AARDEX Corp.	31	Bright Side Inc.	19
Advantagecom Networks Inc.	82	BURRIS	94
AIS Market Research	24	Business Direct Marketing	27
AlmostGolf	20	Business Services	48
Alternate Response Associates	58	Champion Education Resources	26
ALTI Business Upgrade Consulting	3	Christianity Today International	16
American Family Association	5	Clickability Inc.	65
Amway Japan	11	ClubMom Inc.	52
Avatech Solutions	60	e-channel online	44
Becton Dickinson & Company	79	eBags.com	35
Biz Help Central	67	eMarketer	38

EncourageMentors	98	NetScope	6
Expertia	25	Network Online Limited	33
Express Personnel Services	80	New Horizons Computer Learning Centers.....	37
FavorWare Corporation	63	Northport Partnership Management	85
Floyd & Partners	21	NoSpin Marketing	62
Glasstree Inc.	14	Palmer Hargreaves Wallis Tomlinson	93
Global eXchange Services	7	PetFoodDirect.com	39
Halley's Comment	28	PropertyMall	9
Haystack In A Needle.....	40	Qinteraction	17
Hobart and William Smith Colleges	23	Real Branding	91
Hodge Communications Inc.	90	Resolve Marketing	42
Hoover Ink PR.....	95	Rivals.com	45
Human Service Solutions	43	ROKS Media	8
Huysen-Honig Creative Services	57	SA Stewart Communications	22
Indaba Inc.	88	SEO-PR	86
Interliance LLC.....	83	ShillerMath	1
Internet Billing Company	51	SMC Networks	2
InTouch.....	54	Soluciones Inteligentes S.A. de C.V.	96
iProspect.....	30	SparkSource Inc.	18
Jensen-Fann Publishers	29	TechTransform	4
Joe Percario Contractors Inc.	75	The Advertising Show	68
Joy of Bocce	13	The Burbidge Company.....	99
KEMP Technologies Inc.	59	The Cottage Discount Needlework	55
KN DATASERVICE	15	The Lightbulb Lab Inc.	89
KPMG LLP (US)	69	The Sales Board Inc.....	34
Lakeshost.com	12	The Write Exposure	66
Loren Casting	61	Time America Inc.	76
Magmall.com.....	36	ToyMagnets.com	41
Mailblocks Inc.	47	University Renal Research and Education Association.....	32
Making Marketing Matter	81	VocabVitamins	70
Marketing Communications	78	WIT Strategy LLC	87
Metro Transit Authority	10	WordBiz Report	50
Milwaukee Area Advertising Agency ...	46	Wordsworth & Company	92
Mindpower Inc.....	74	Xcellent Marketing	64
Molander & Associates Inc.	53		
Morning Papers.....	49		

Introduction: This year's all about "in-person" marketing

Welcome to our second annual Marketing Wisdom report — created by MarketingSherpa readers to help out fellow marketers, advertisers and PR pros.

There are two big changes this year — the first being that the name changed. Last year this report was called *Marketing Inspirations*. Our own marketer Carol Meinhart suggested this change. "Inspiration is what you need when the creative wells run dry — wisdom is what you need to get the good results continually."

The second change was based on your feedback. More than 100,000 of you downloaded last year's edition, but many felt it was just too darn long. Even if every page is useful, who has the time to read 136 pages of stories and quotes?

So when we received more than 350 submissions this year, I agonizingly cut, and cut, and then cut some more. It was painful because I believe everyone has something valuable to say, and I hate leaving contributions out of a group project. If your story or quote was one of the ones cut, please accept my apologies. I was trying to pick the stories with both the broadest appeal and the most practical use. Plus, if more than one story touched on the same point, I picked a single one to represent the idea.

One overwhelming trend definitely appeared through many, many contributions — this year it's all about personal relationships. Yes, search marketing, email, direct mail, etc. tactics all still work. Yes, metrics continue to rule. But, in the end, if you or your brand makes a personal connection, your marketing has profoundly greater impact.

I'm not talking about fancy 1-to-1 marketing with 21st century CRM systems interweaving with dynamically personalized email and/or Web pages. I'm not talking about technology at all in fact. It's about a human being meeting another human, preferably in person.

Here's a typical story, contributed by brand strategist Dee Merica:

"As marketers we spend a lot of money trying to capture that elusive 1:1 relationship with our customer. E-mails, newsletters, blogs, databases. My phone rang recently. It was a very dear friend who had taken me under his wing some twenty years ago and mentored me. He is now 76 and retired. He said, 'I was wondering if you have some time to have a bit of lunch, chat and discuss a business opportunity I've been considering.'

"It was a lovely lunch. And, I realized he continues to teach me. I learned that while technology is wonderful, and it has its place, lasting relationships come from facial expressions, the sound of the human voice, and the personal time invested to say I care about what you need."

Business-to-business marketers with limited niche audiences, and business-to-consumer marketers with heavily used customer service centers

will be able to maximize on this idea. It's a bit harder for marketers working for brands whose mass outgoing communications have few incoming channels — but not impossible.

Perhaps you should add candid photos of your management team to your site. Maybe send executives on the speaking circuit and also post streamed video clips for those who can't make it to see them. This may be the year to get execs, or brand representatives, onto radio or TV talk shows. Or at least personally tour to meet with your franchises, outside sales reps, distributors, and/or offshoot offices.

Schedule more business travel than you have in the past. Attend a few more trade shows. Have your CEO call a few partners in person to say thanks for being so great. Drop your sales pitch, and start to listen, to connect, to relax your guard.

I bet it will pay off with dividends.

My very best for your 2004 marketing campaigns, and thanks for your support,

Anne Holland, Managing Editor
MarketingSherpa

P.S. Thanks for the second year in a row to the folks at WebTrends whose support cover the production costs for this report so we can bring it to the marketing community free of charge.

Part I: Real-life Campaign Stories

1 Ruth Anne called yesterday to see if we were exhibiting at an upcoming Michigan conference; she was on a budget and wanted to save on shipping. I asked how she heard about ShillerMath and she didn't remember exactly but she did say that she's been wanting to buy for a year now. A recent ad in a homeschool magazine prompted her to call. We market to homeschoolers and it's a very seasonal business; 75% of our sales occur between March to August. It is tempting to save by cutting our advertising from September to February. But homeschoolers take their math curriculum very seriously and many, like Ruth Anne, research throughout the year. I'm really glad the marketing team decided to keep the ads going all year long. There's a lot of Ruth Annes out there!

Larry Shiller, President, ShillerMath,
www.shillermath.com/page1.php?src=sherpa

2 We recently conducted a text-based email campaign to value-added resellers who we hadn't contacted for a long time. While we had almost a 50% bounce rate (which we anticipated) and the usual 1-2% response rate for text-based emails, we learned a few things: the message really hit home with folks we hadn't contacted for a while and they became new resellers, and we found out about some customer service issues, fixed them and won the resellers back.

The point is: don't give up on the prospects who aren't your customers yet because they may convert down the road, and even though someone said no thanks to communications a year ago, don't count them out a year from now — they may now be in a position to buy from you!! Last, your communications might uncover some customer service issues. Fix them immediately and retain the customer!

Sue Duris, Channel Marketing Manager, SMC Networks, www.smc.com

3 We learned from some failures. I was retained by a client to send an e-mailing to about 2,300 names gathered from a trade show event. The campaign was a disaster. I had requested daily uploads of the prospect list (so our first email in a series of 6 emails would be waiting for people when they got back from the show). However, the client did not get me the list until a week AFTER the event. In addition, an overwhelming majority of the names had little, if any, contact with anyone at the booth. No memorable impression will not help other efforts! I scrambled to tweak the entire campaign, adding a sweepstakes for a flat panel monitor and giving away a few other cool prizes and free trials. The campaign as a whole pulled only a 1.67% click through with a peak of 3.2% on our second mailing. Oh, and total conversions... ZERO!

Allan Sabo, Marketing Strategist, ALTI Business Upgrade Consulting,
www.alticonsulting.com

4 This story dramatically underlines the value of your own product as a marketing asset. I was given the assignment this year of greatly increasing the US visibility and revenues of Panda Software, a strong European anti-virus developer. The thing about anti-virus is that it's a commodity space. Therefore, the service has some value even if unbranded. I took an internal suggestion and decided to test a controlled giveaway program. Our space was the Small to Medium Enterprise (SME) and our target was the overworked IT manager in those companies and institutions.

Called IT @ Home and positioned under the Panda Challenge umbrella, our program was simple: if you were an IT Manager, we wanted you to have a full year of our professional AV product for your use at home, at no cost or obligation.

We rolled out the program initially through *W2Knews*, a publication strongly identified with the IT network manager audience. Interestingly, we found that the offers only had legs when made editorially. We expanded through other technology newsletters like *The Anchor Desk*. The response was instant — and all told we gave away over 10,000 of these products to a very focused audience. To ensure that these were mostly IT decision-makers, we made the offers through sharply focused IT publications and research orgs (never flat Web sites), and we took down the download links within a couple of days. We did tolerate a percentage of unqualifieds.

Now, in following up on these downloads we found that the audience greatly appreciated the gift. This made it easy to talk to them. A plus was that in many cases these managers found viruses on their own home machines — machines they *thought* were fully protected! This opened up the door to quoting Panda Av on their corporate networks. It became ridiculous — everyone, including the media, was finding viruses on their home machines! This became The Panda Challenge and it did wonders during the virus storms of late August.

I'm a strong believer in the popcorn-popper, which means that there has to be a whole process of following up individually on each lead. (This does mean you have to invest in sophisticated event-driven sequential autoresponders — as offered by Campaign from Arial Software, or by GetResponse.) So we devised a whole series of follow-up offers that followed the internal motto: Serving the Underserved.

The dirty secret in B2B software is that the big enterprises get all the benefits while the SMEs get underserved. So we made a specialty of identifying programs that our competition only pulled out for the biggest accounts, and made them available to virtually every business: Competitive Renewals, Employee Free Seats, Free Network Detox, Free Phone Support, etc. These were highly effective poppers.

Our campaign to leverage the resources we had actually delivered an effective positioning of the company as the SME IT Manager's friend. How effective was it? Well, after a couple agonizing months, the sales and

revenues took off, starting in the bottom of the summer, and eventually doubled in range. You can see the graph at www.techtransform.com/id344.htm. The ultimate test? After I wrapped up, Panda continued to use IT @ Home and has made this program and its positioning as its centerpiece for 2004. Which means that Symantec, McAfee, and Trend Micro had better watch their rears!

Riggs Eckelberry, Principal, TechTransform, www.techtransform.com

5 We are a nonprofit, pro-family advocacy organization. I've learned that using online polls and petitions dealing with relevant hot button issues can be a great way to build a mailing list. I've also learned that being the first one to hit the issue pays big dividends in terms of the number of responses you accrue.

Paul Chaney, Email List Administrator, American Family Association, www.afa.net

6 Our lesson learned was how to improve email marketing. Our challenge wasn't so much the opt-in database, but getting the folks in that base to read (open/click on) the newsletter and the stories in it. Our first move was to create a sense of involvement or empowerment for the recipients. We provided them an opportunity (raffle for five) for a discount on a significant service, which many of them already utilized, for those who responded with suggestions/requests for topics about which they'd like to read. We offered the respondents the chance to be credited with the topic suggestion, which would give their business promotion to our audience.

This improved our click through rates on the newsletters by more than 25% (a rate maintained after the second issue with these changes implemented). It improved our click through rates into the stories (usually two stories per issue) by more than 30%.

Our second move was to switch the TO line to be from the company, not an individual. This, implemented two issues after the above change, had an immediate impact with open rates improving another 15%.

Our third change was to the subject line, changing it to highlight the main story in the following format: NEWSLETTER TITLE: You asked for: TOPIC. From this, we saw another 8% increase.

Our fourth change was to follow up more thoroughly with those who clicked through and opened the newsletters and the stories. We were establishing patterns from the recipients that suggested additional services in which they'd be interested. We found that specific and personal emails to these people by email and phone resulted in improved customer service at a minimum. Some of the recipients did not necessarily jump at new offerings, but many had questions/concerns about existing services or even services they were getting from other vendors. Now they're more engaged and more satisfied/impressed.

Michael Beresford, President, NetScope, www.net-scope.com

7We introduced pre-populated response forms embedded into our HTML email campaigns, together with a submit button. Our response rates have increased over 100% since we adopted this simple change — load the deck in your favor! Make it easy for someone to get back to you — you don't need to send them to a Web site if you have already captured their interest!!!

Niall Booth, Global e-Campaign Manager, Global eXchange Services,
www.gxs.com

8We needed a marketing message that was brilliant, inexpensive, and targeted to IT professionals looking to increase their salaries through advanced certification in a small geographic area. I began by going to all the major IT sites I could find such as Tech Republic, TekCentral and so on, and reading articles on career recruitment for these professionals. After about seven articles, a common thread was visible as far as a problem that IT guys were having in getting further ahead. Using this info, I began to script it into a storyboard. I discussed a look and feel that would be appealing to this tech-savvy group with our programmer designer and a week later a mini e-mercial was born. After finding the appropriate email lists via PostMaster Direct, 10,000 messages went out. We had an 11% open and click through rate, as well as five new students signed after three months of running the campaign on a once-a-month basis.

The key to the client's satisfaction was being able to measure and manage his or her inquiries and click through rates via a landing page exclusively dedicated to campaign respondents and the dynamic statistics that we were able measure by tagging links in the message to measure their click through rates. These tags also enabled us to see what people typically were clicking on, such as the button at the top or bottom of the message so we could refine it over time. I found it fascinating that on little to no budget, with the proper due diligence, creativity and measurement methods, a campaign can be extremely successful. There was no real strike of brilliance that made this campaign successful, just doing the background research, investing some time in understanding the demographic, and customizing a message they were interested in.

Katherine Smith, Strategic Marketing Director, ROKS Media,
www.roksmedia.com

9For a conference that we were exhibiting at a few months ago we used a postcard-sized handout with a screenshot of our Web site on one side and a postage-paid enquiry form on the reverse. It was incredible watching the reaction to the card. People actually stopped in their tracks to examine the screenshot at length. I would definitely recommend this approach; the results have been fantastic.

David Miller, Director, PropertyMall, www.propertymall.com

10 This success story deals with two staples of the marketing world — free offers and direct mail. Our organization, the local transit authority in Cincinnati, OH, sent out 800,000 pieces to zip codes along targeted bus routes as part of a summer Clean Air ridership promotion designed to entice people to ride the bus, instead of driving, to reduce smog in our region. The mailing consisted of an oversized postcard that featured some facts about the bus and a free ride coupon. We only included one coupon for a reason: since most transit customers ride two ways, we were ensuring increased revenue from trial riders who used their coupons for one portion of their trips. None of us believed it when the coupons were counted at the end of the three-month promotion and the total redeemed — more than 42,000 — it was closer to a 5% response rate, which translated to about a 3% ridership increase when compared to budget. The secret we learned was no secret at all: direct mail done right with a meaningful offer gets results every time!

Dave Etienne, Supervisor of Communications, Metro Transit Authority,
www.sorta.com

11 I was reminded that it's all about segmentation — of course, we segment the audience but we often forget to segment the content. We learnt that if we go through the simple exercise of cutting up the content to make sure that we take advantage of the particular strength of each channel, we can add weight and impact to the overall campaign. When we tried this on a dog of an offer (that was going nowhere in the print channels) by making sure each channel pointed at and amplified each other, we increased sales by more than 1000%. Needless to say, content mapping against channels is now an SOP for us.

Terry White, Chief Communications Officer, Amway Japan, www.amway.co.jp

12 Embarrassing admission: When I first launched the Test-and-Track.com Web site my initial conversion rate was well below 1%. I soon got rid of the great graphics and “professional” looking design and changed the site to a simple sales letter. I then tested each individual element within the entire sales process and the site is now enjoying a conversion rate well over 3%. The moral of the story: Test everything, let your customers provide you with results and don't be afraid to make mistakes.

John Taylor, Marketing Adviser, Lakeshost.com, www.Test-and-Track.com

13 My ezine, *The Joy of Bocce Weekly* (8000 subscribers, HTML format), features info on the sport, tips on improving play, tournament listings, and bocce products. A regular Photos of the Week feature links to my Web site (joyofbocce.com) and gets hundreds of clicks every week. People love to see other people's bocce courts and venues. Once I learned that This Week's Photos was the most visited page on my site, I began posting some of the photos, then a pictorial reminder about the Bocce Product of the Week, and finally the rest of the photos. This new format

gave readers a second look at and reminder about the product I was featuring that week (first look was in the ezine itself) and subsequent sales increased by 30%.

Mario Pagnoni, Author, Publisher, Joy of Bocce, www.joyofbocce.com

14 Previously, our site was light on copy and used just enough to make people want to know more theory. The problem was, it really wasn't enough. People needed to know more in order to want more. We were afraid that people would not read our site. We got almost no leads from our Web site. We had used it as a great tool for putting information in the hands of prospects we gained in other methods but it wasn't bringing in any real business on its own. That has changed. In October, we redesigned completely and developed an information rich strategy that gives people large amounts of what we consider compelling copy. Not over the top sales copy but basic information about our product in a user focused conversational style. We use the idea that long copy works because it tells a dramatic story and plays to the reader's emotion. We focused on telling a good story on every page.

Since that time we have generated substantial new business because of the Web site. Conversion rate has improved dramatically as has our overall traffic. Most impressively, in the month of October alone the Web site led 49 new recruits into our national reseller program!

Carl Brown, Director of Marketing and Partnerships, Glasstree Inc.,
www.glasstree.com

15 Never assume anything! I have a site at www.zipey.com. After exchanging emails with several online friends in the online marketing business I received hints about my Web page trying to sell my software too hard. I thought, OK, let's try to redo the site into a more software-selling site, without the clear sell taste. Out came www.zipey.com/index2.html, (this URL is still alive for you to compare the look of the sites).

So what did I learn from using the more traditional software site look, compared with the more sell, sell, sell style of site? The results come from two months running each look. The normal site, explaining what the program does, how it works, and its features, www.zipey.com/index2.html, converted 1% of the visitors. My original site, www.zipey.com, built around a sell message, not directly the software, converted 2.5% of the visitors.

I actually like the more standard site better myself, but it just doesn't sell anything. So, never stay in the same place, nor leave your ad copy, site look or your life for that matter in the same place. Work it, move it forward and change as your journey brings you to new places where you never have been. Remember, you can always change your site back again!

Kent "The Designer" Nasstrom, CEO, KN DATASERVICE, The Designed Software Series, www.kndata.com

16 For two of our Web site channels, BuildingChurchLeaders.com and ChristianBibleStudies.com, we added a cross-selling feature into the shopping cart that gives three related downloads to what they're purchasing. This provides a service to customers because they don't have to spend time searching for other downloads. Also, it shows the breadth of resources we offer on topics they are most interested in. Since launching this new feature, cross-selling has represented 15-20% of our total sales!

Cory Whitehead, Senior Resources Marketing Coordinator, Christianity Today International, BuildingChurchLeaders.com and ChristianBibleStudies.com

17 Our previous Web site had a Contact Us page which listed our company contact details. However, we found that we were not getting a lot of calls or emails. In December, we enhanced our site to include our toll free telephone number and email address on each and every page of the Web site. Furthermore, the contact details are placed on a bright, attractive, colorful background, which immediately grabs the attention of the viewer.

As soon as we uploaded this new design, we began receiving many more customer inquiries and comments. In fact, I estimate our customer inquiries have increased by five times. The lesson we've learned is to make your company accessible. Tell your customers who you are and what you can do, but more importantly, tell them where you can be found! Don't keep them searching. Remind your customers of your contact details at every opportunity and the calls (and emails) will come in!

Tim Smith, Vice President Operations, Qinteraction, www.Qinteraction.com

18 Think Big. One of our clients celebrated their 20th anniversary this year. A \$20+ million software company, they had been making good progress on a more focused business plan but still remained one of the smaller players in the marketplace. They needed a seat at the table with the bigger players but were often left out of activities that the others were involved in. We needed a way to get them included.

Our first seat at the table activity was literally a seat at the table. We hosted an analyst dinner at a trade show, inviting the other vendors and asking each to bring a customer to meet with select analysts. A neutral party was asked to be the moderator for the evening's activities. A number of industry analysts were invited, and also attended. The dinner was held at a local upscale restaurant. At the end of the evening, a working group was formed by the participants to deliver a series of industry standard reports.

Our second seat at the table activity took more than seven months to pull off. Through contacts at the Governor's office, we managed to convince the Governor to open the Stock Market with the CEOs of three local companies (including our client). This event finally occurred this week and was a success for all involved, especially our client who was involved not only with the Governor but with the CEOs of other, much larger companies.

If you are judged by the company you keep, they have been judged much larger than they actually are. Like all PR, this is a slow process but we are already seeing signs that we are accomplishing our goals.

Roberta Carlton, Vice President, SparkSource, Inc., www.sparksource.com

19 I'm a seasoned marketing pro, but have little experience with the PR side of the business. In networking at a communications meeting, a woman who is a PR guru recommended submitting our CEO for prestigious awards as part of an overall PR campaign. I researched various industries that we wanted to enter, as well as fields in which we are known, and sent out for applications. This process was easy as most of it is online, and much of the same verbiage can be cut and pasted. Like much of sales, it was a matter of numbers — the more I sent out, the more likely the chance of winning an award. Also, I test marketed the copy — tweaking copy here and there to see what the best response rate was.

After several submissions, our CEO was awarded the most prestigious award we entered a submission for. This award not only includes a gala dinner for C-level business executives, but also includes a special pullout section in the area's major newspaper publication, a video, extensive press coverage of the event AND it really boosted our CEO's standing in the community — not to mention how great it made her feel. The secondary benefit is this is now something I can promote heavily in our literature and on our Web site.

So, I learned PR is not all about story pitches and press releases. Award nominations are a simple and time-efficient way to get extensive PR coverage.

Lynn Wheatcraft, Director of Marketing, Bright Side, Inc., www.bright-side.com

20 We are a one-year-old golf ball company called AlmostGolf with two PR agencies. One is an "insider" golf specific agency and the other a straightforward Dot.com type agency to cover the "outside world."

Our general lesson, after looking back over the year, is that if an agency is industry specific, and has more than one golf client, they are just like an ad agency; they have a built-in conflict of interest. This comes out in the form of a pecking order depending on client age, pay rate and relationship within their roster. Basically, they are forced to parse out their PR leads to their various inside media relationships. As a result we found that:

1. We began to not trust that our message had even reached targeted outlets through the insider agency.
2. We were not sure if we did or did not get placement because of the outlets' positive or negative relationship with our PR contact.
3. The insider niche agency seemed to base many of their article placements on the old methods of relationships, schmoozing, massaging etc. of the media outlet.

Finally the proof is in results. We found the dot.com agency significantly out-performed the niche company in and out of the golf industry. They simply took the relationship aspect out and focused on the merits of a powerful press release to a range of media outlets. In today's highly competitive PR environment, cutting to the chase seems to be the rule of thumb for our small company. No longer do media outlets, at least on our level, get gift baskets or trinkets. They just get hard news about our progress and programs... and news. And that seems to work great.

Robert Peterson, Founder, AlmostGolf, www.AlmostGolf.com

21 We recently did a pro bono campaign for Indiana's Safe Haven law, which is meant to prevent infant abandonments by permitting the parent of a newborn to legally relinquish that child at a hospital ER with no questions asked. As a poignant reminder of why we needed to raise awareness of the law, we had a press conference at the gravesite of a newborn who had been abandoned the year before. And to serve as an example of the happy ending we hope for with Safe Haven, we brought in a two-year-old girl who had been turned over through a similar program in New York. The press conference was a great success with extensive coverage in both print and broadcast. Furthermore, the TV and radio spots we developed were played broadly and extensively in the local media. More importantly, within days we received three calls from pregnant teenagers who had not told their parents of their condition. Here's the astonishing part: contrary to our assumptions about reaching teens through radio and TV, all three reported that they called the 800 number because they had read about it in the paper. Naturally the lesson here is don't underestimate the potential of the newspaper for reaching a female teen audience.

Bob Floyd, President, Floyd & Partners, bob@floydandpartners.com,
www.floydandpartners.com

22 As a former news reporter for major media (including nearly 15 years at USA Today), I used to think that paid PR opportunities were a waste of money and time because if the story was worthwhile, you shouldn't have to pay for exposure. But as my book neared its publication date, I took a gamble and bought an advertorial in a publication targeted to talk radio producers. The results have been nothing short of phenomenal. I also paid for an opinion column to be distributed on a paid syndicate. Again, great results. The bottom line is that these paid opportunities did shake loose traditional media opportunities and I won't be so quick to dismiss paid PR in the future.

Sally Stewart, Author, Media Training 101, SA Stewart Communications,
www.mediatraining101.com

23 At Hobart and William Smith Colleges we built a database to market our academic expertise. Now, when reporters are looking for experts, we have an informational base that includes the professors' academic achievements, community activities, research interests, professional affiliations, publications, and more. And since the media "business" is so spontaneous, when something happens in the world for which we have a professor who can offer insight, we have a full package of information to send to the media to let them know. Yes, we've learned that a database devoted to marketing the faculty pays off — we get many hits in print and broadcast arenas now that we would have missed before.

Susan Murad, Director of Communications, Hobart and William Smith Colleges, www.hws.edu

24 We needed to secure participation in an online market research survey among a highly specialized subset of a B2B software user population. Of course, no email list was available to reach this population so we did a telephone pre-recruit to the online link. The overall quota for the survey was 400 completes so we estimated a total of 550 pre-recruits would be necessary to account for break-offs, etc.

Well, we were wrong. We discovered that a 2:1 ratio was actually necessary (recruit 800 for 400 completes). This made a significant difference in overall cost of the project and length of time necessary to fill the survey quota. We have duplicated this same recruit technique several times over the course of the past year and have found the 2:1 ratio to hold true. We have implemented many multi-pronged methodologies over the last couple of years in an attempt to find a way to leverage online surveying into previously tough to reach audiences and our opinion is the telephone pre-recruit is the best bet, even at a 2:1 recruit cost.

David Smyth, VP Client Service, AIS Market Research, www.aismarketres.com

25 We conducted a good old B2B mail survey this year and got 25% response rate, up 15% over a very similar survey done two years ago. We made a very careful preparation, from envelope design to gifts included in the same post, a slight improvement over the previous edition, but nothing earth shattering. But the real breakthrough was achieved by a random telephone contact made ahead of the survey: 55% of those randomly selected phone contacts answered the survey and gave their contact details willingly!

Carlos Ladaria, Director, Expertia

26 My lesson learned was that embedded surveys to your client list really pay off. We provide training and speaking services. By sending secure surveys via email BEFORE and AFTER the event, we gain the competitive edge as to why they want to hear and what they liked and disliked after the event. This created increased loyalty and retention by providing extra value and professionalism with the client and with the people who attended the sessions. Huge Success!

Curt Tueffert, Speaker/Trainer, Champion Education Resources, www.teamcer.com

27 Recently, we were asked by a regional healthcare system to assist in marketing its owned, multi-location primary care physician group. We developed a one-to-one marketing solution whereby we variably imaged, printed and mailed cards introducing each doctor to the community. Cards were highly personalized and targeted to the receiving household by name and potential healthcare need.

For example, cards intended to market the pediatric portion of a doctor's practice were targeted to families with children. Those cards featured a photo of the doctor in a setting with kids (in one case fishing with two boys off a boat-launch; in another case with a small girl and her Raggedy Ann doll on a playground; in another case a doctor and a boy with a horse). All photography portrayed the doctor as warm and approachable. Where possible, copy points attempted to feature the doctor's actual personal interests. Photography also portrayed the doctor juxtaposition with a recognizable community landmark, if possible. Pull-quotes from the physician on the card fronts and backs were personalized to the recipient by first name and set in a script font, as if signed by the physician.

On one pediatric focused card, the pull-quote read: "Regina — Our clinic is located just down from Owens Elementary School, north of the Gresham four-way. We take same-day appointments and drop-ins. — Dr. Jim Durrett."

When marketing to the adult portion of a doctor's practice, cards from the same doctor were targeted to adults, with photography and pull quotes that emphasized adult healthcare issues. For example, we pictured the doctor fishing with an older man on cards aimed at geriatric patients. The pull-quotes changed to emphasize adult issues.

Each card is literally a personalized, "one-to-one" marketing experience for the doctor and recipient.

RESULTS: Outstanding! Appointment seekers began to call physician offices immediately following the cards dropping into homes. Because the cards featured giveaway items (umbrellas and calculators), the client was able to accurately track responses. With one doctor, 6,311 cards were mailed. Within 48 hours the clinic had made 42 appointments that could be specifically tracked to the cards. In another case, slightly fewer cards went out and the results were equally encouraging. While the numbers are not large by consumer/retail standards, they are striking in the world of healthcare where patients are counted by the tens and hundreds, not the thousands.

Ron Ragan, Vice President/General Manager, Business Direct Marketing,
www.businessdirect.com

28 I started my weblog Halley's Comment in January 2002 with a monthly average of about 100 page views. In January 2003 I was up to 10,000 and by August of 2003 over 50,000/month (although my average is closer to 40,000 now). I built my traffic the old fashioned way, generously promoting other webbloggers by linking to them, writing stuff that made people laugh and trying hard to put up fresh and unique content on a daily basis. I also try to listen to my very vocal email audience who tell me, within seconds of a posting, what they like and what they don't like. Weblogging is the most interactive medium I've ever worked in, being second only to stand-up comedy. So far the weblog audience has not figured out how to throw rotten virtual tomatoes at a bad post, but I'm sure they will.

Halley Suitt, Writer, Halley's Comment, www.halleyscomment.blogspot.com

29 It's funny how deep our prejudices can be that lowering prices will increase sales. I actively advise others that it is NOT necessarily the case, and yet... I was running an A/B/C split price test on some remnant hardcover books about cats through Google's AdWords. We wanted to see if there was a difference between \$1.93, \$1.96 and \$1.97. Because we were seeking lots of results, but were getting just 6-10 a week, I figured why not get more responses by lowering the prices to \$0.93, \$0.96 and \$0.97? The result? Zero sales. Because I couldn't believe it, I let the ads run at the lower prices for a full month — which would have generated 30-40 sales at the higher prices. Not one single order came in (except the test order I placed myself to make sure the links were working!). Just goes to show that when people can't see the quality of a product themselves (as in Internet sales), they use price to evaluate the quality. And while \$1.96 might be reasonable for a quality remnant book, our visitors apparently thought \$0.96 was not.

Marlene Jensen, CEO, Jensen-Fann Publishers, www.PricingPsychology.com

30 I had heard for years from colleagues at other companies, and in other lines of business, that webinars or online seminars could be very powerful lead generation and branding tools. And over the years I have attended some of these types of events that were done very well and some that were done very badly — so I was determined that when my organization stuck its toe in the water to test the effectiveness of this marketing channel, we were going to be one of those companies that did it right.

And what that meant to me was that I was NOT going to try to manage the logistics of the webinar hosting, was not going to serve as the moderator, and was not going to even supply the content — but instead partner with an organization that has held dozens of webinars a year for several years, that had an experienced and professional moderator to manage the agenda and the logistics of the actual live event, that also had a speaker who could present content from an independent third-party

perspective that mirrored and supported what we would have said if we had presented ourselves, and finally, that had their own opt-in database and subscriber/client base, which was an order of magnitude larger than ours, to whom the event could be marketed.

Too good to be true? Almost sounds like it, but in actuality even paying top dollar to sponsor such an event and gain the professional impression, the third-party validation, without appearing to be presenting a sales pitch, the exposure to a much larger prospect base, and the leads (over 500 from a single event at last count) — is well worth it to someone who hasn't run developed and run one of these events themselves before. And based on my experience thus far, I may NEVER run one of my own so long as all the advantages I just detailed exist in sponsoring someone else's event.

Bill Muller, Director of Marketing, iProspect, www.iprospect.com

31 Mini-billboards tackle target audiences. Small contractors were our target audience for storage condos. To reach this market, we deployed mini-billboards at point of contractor: wholesale supply shops. Our marketing message was displayed on the mini-billboard with an enticement to ask us for a \$250 gift certificate good at the supplier's establishment with a purchase or rental of a storage condo. The mini-billboards were preprinted prior to asking for permission to display them in the establishments. We had a success rate of 80% getting placement in the point of contractors. The wholesalers loved the mini-billboards with their company's name prominently displayed. Nothing beats taking your message to your audience at a place where they frequent. Plus, the tie-in with the wholesalers gave us instant credibility. The merchants received no direct compensation for placing our advertising on their counters. Big impact. Small Cost. Huge success!

Ed Gazvoda, CMO, AARDEX Corp., www.storage-condos.com

32 For nonprofits, trying to manage a brand identity independent of funding sources can be a challenge. To build brand awareness and promote research findings from the DOPPS, the marketing team created a pre-show mailer (postal — in-house list), email reminder, response card, and CD-ROM giveaway for the American Society of Nephrology conference. Response cards were part of the pre-show mailer. CDs were only at the show, and included an online response form. The response rate for the cards (n=1000) was as expected (4-5%); response for the CD (n=900) was almost 0%. Further, the majority (~80%) of response cards indicated email/online as a preferred communication medium. Lesson (re)learned: paper compels action.

Kerry Colligan, Manager, Communications Strategy, University Renal Research and Education Association, www.urrea.org

33 We're a hosting company that caters for the business end of the hosting market. In the middle of 2003 we made some changes to our Web site, adding functionality that allowed potential customers to create their own hosting plan from a huge list of choices we made available. As they made their choices, the pricing changed immediately to reflect that choice. It even had automatic discounting built in so that the system provided discounts based on order-value and the amount of a particular item that was chosen. It was very sophisticated, took 4 months to build, and cost a lot of money.

When we spoke to people about what we were doing they all thought it was a great idea. We even added fancy features that allowed customers to build their basic hosting package, and then add additional services that they wanted. As they added items and services it was all stored in a shopping cart. Finally, they could go to the checkout and make their purchase. It was a GREAT system.

It was a disaster. Our new sales more than halved the day the new system went live. We put it down to it being a quiet day — then a quiet week. The second week was worse. At the end of the month we thought it must have been a bad month (our worse ever) but we put out some feelers and the rest of the market seemed to be as busy as usual. The statistics for our Web site showed that we were still attracting as many visitors as before but the number of pages people were viewing was down almost 60%. We started to suspect there was something fundamentally wrong with the Web site. By the 6th week we knew it. Our prices hadn't changed, our offers hadn't changed, but the way we were displaying them and offering them had changed enormously. We asked the few new customers who had signed up what they thought of the Web site.

Here's what we heard: it was too complicated, it took us ages to figure out how to place the order, we didn't know what choices to make so we went with the defaults, we didn't like the shopping cart, it was too technical, we didn't like the way some things were said. It made us realize a few things:

1. We were asking people to make choices when many weren't sure what they would need.
2. It took nine clicks to finalize an order.
3. A company's Web site and email is critical to them. They didn't want to entrust their hosting to a company that was treating hosting as a commodity purchased through a shopping cart. That's a strange one considering how orders are placed at the moment, but the shopping cart idea was frowned upon by almost everyone.
4. The language on the site had become too technical (it's difficult to make it friendly when the nature of the business is technical) but we went too far focusing on what we thought was important.
5. We didn't cater well for the different levels of experience potential customers had.

6. Our range of offers was too large.

7. Although we were involved in hosting, we were working in two quite distinct markets (general hosting and dedicated servers) with different customers with different technical expertise and knowledge. We treated all customers to the Web site in the same way, assuming they all had a reasonable grasp of what they needed.

A few weeks ago we released our newly designed Web site. We completely removed our fancy new system with the ability to make choices but we made it clear (I hope) that our plans were flexible. We designed it so people could complete an order within two clicks of entering the site. We kept the technical information within the site but we removed it to areas where it could be found but didn't need to be read. We keep general hosting, and dedicated servers completely separate by having two different sites (and domain names) for each service. Our new Web site isn't perfect, but we have a much clearer understanding of the impact the language, presentation, and the content have on our potential customers.

With our new Web site, sales have increased to beyond the levels they were before and enquiries about our service have increased enormously. It was an expensive lesson but we're glad we learned quickly enough to remedy it.

Paul Jamieson, Director, Network Online Limited, www.network-online.co.uk

Part II: Words of Wisdom on Marketing Tactics

34 One of the biggest lessons I can share from this past year is that when you conduct/launch email marketing, make sure you have the offline back-end systems and procedures covered. Making sure the links work, landing page is optimized, and your shopping cart is updated are no-brainers. But just as important is to ensure your offline systems (AKA customer service team) is properly trained and ready to do their job. Too often we think that automating campaigns and order functions are the most important things — build it and they will come.

2003 has shown me over and over again how important people still are in the equation. Recipients of your email may have questions about your offer, product delivery, method, etc. that a real person must answer. The sooner they get their answer, the sooner they make a purchase. Timing is very critical. Alert everyone when a campaign is going out so they are ready to jump on any calls or email questions that come in. Try to respond as quickly as possible. Believe it or not, most companies take hours or days to respond. In fact, some never do.

You can really differentiate yourself from the competition by doing something as simple as responding to a prospect's email within minutes, not hours. This is something they are not used to and they do not forget it. Think about the last time you were surprised by great service somewhere. Then think of how many people you've told the story to. Companies can't buy PR like that. Customer service is still key.

Matt Monarski, Director of Marketing, The Sales Board Inc.,
www.thesalesboard.com

35 Bigger isn't always better. Our customer database was at 2.1 million customers and prospects when I took over the email marketing position last year. Unfortunately a large segment of the members in the database were inactive prospects from online sweepstakes or co-registrations. As a result we discovered some of our email marketing efforts were being wasted. In an effort to cleanse our database, we sent a requalifying email to all inactive prospects and reduced the size of our database significantly. The results have been excellent: dollar per email has increased tenfold and response rates have increased by a magnitude of 8%. In addition, our blacklist and spam complaints have plummeted. The lesson we learned is that a smaller qualified database is superior to an enormous unqualified one.

Mary Beth Ellis, Email Marketing Manager, eBags.com, www.ebags.com

36 We had been sending out magazine subscription savings offers and renewal notices to existing subscribers for weeks with pathetic click throughs and more pathetic opens of our emails. After checking our logs yet again we realized that our emails were being routed through our Internet connection provider and that their IP addresses were blacklisted by organizations. I never would have suspected that a company as large as our national carrier would not be monitoring their

bandwidth. So my recommendation is to check the route of your email and make sure it is totally clean or else switch your route. Check your logs as well to find other problems like this with delivery.

Jason Ciment, CEO, Magmall.com, www.magmall.com

37 In conducting a series of email marketing campaigns in 2003 we learned the hard (and expensive) way that the real value of this vehicle is to contact, market to, and sell more to EXISTING customers. It has, however, proven to be fruitless and almost a tad damaging if used to try to reach and sell product to NEW customers. Gear your emails for the purposes of customer retention and customer cross- and up-sell and don't waste time and effort on using it to introduce your brand services or products to an unknown market.

Chuck Lennon, VP of Marketing, New Horizons Computer Learning Centers, www.newhorizons.com

38 This year for me marked a year where I became enthralled with and potentially addicted to online networking. This new generation of sites — including LinkedIn, Ryze and ZeroDegrees — offers a great way to stay in touch with contacts and meet others. I've been able to use these sites to reach out to someone in the media who was interested in the research we provide. What excites me even more is that these are all fairly new and they're improving constantly. Next year their own entrepreneurialism and the competition out there should lead to improvements that will make them even more useful.

David Berkowitz, Director of Media Relations Editor, eMarketer, www.emarketer.com

39 Most Internet companies fail to optimize the frequency with which they profitably solicit their customer base. Therefore, no less than once each quarter, marketing should test a frequency campaign to assure the optimization of this important source of revenue. You should test frequencies of once a month vs. once a week vs. twice a month and twice a week, thereby determining how best to harvest your customer file

Geoff Walker, CEO, PetFoodDirect.com, www.petfooddirect.com

40 2003 has definitely been a big year for search engine marketing through search engine optimization and pay per click advertising. And anyone who has spent even five minutes studying search engine marketing understands the importance of targeting the right keywords and search phrases to drive appropriate traffic to their Web sites. However, a common trend I've seen consistently throughout 2003 is a slipshod job of search phrase brainstorming. Any business should be able to think of WAY more than a dozen ways to describe their business, their services, products, etc. Go beyond your industry jargon and think about what your prospective customers might type into a search engine to find you. There's gold in them thar terms in 2004.

Ed Kohler, President, Haystack In A Needle, www.haystackinaneedle.com

41 Though it can easily be said about any marketing, it's critical to take a long-term view of Pay Per Click (PPC) advertising. Many variables can affect ROI during a small time frame. A single rogue bidder can run up the bids at any time. Seasonal market demands can skew bids up or down. Sometimes PPC bidding can be downright counter-intuitive.

I had been consistently bidding in a select niche market for almost a year, seeing minor fluctuations in bidding but generally staying in the range of \$.75 to \$1.00. In the month leading up to the holiday season I saw two competitors run up the bids to \$4.25. At that rate I knew I couldn't make money. However, I kept up the pressure because I knew they couldn't sustain that kind of price per click during a peak season. Sure enough, after a couple weeks they not only lowered their bids but one actually stopped bidding outright. My guess is they had a certain budget and when that was depleted, they had to slow their ads or drop them completely.

When the peak season finally rolled around I was bidding in the top at less than \$.40 even though the traffic and conversion were at the highest point in the season. Lesson learned: Watch a market for an extended period and then come up with a consistent bidding strategy based on ROI, not simply budget. Stick to it for the long term.

Mark Carson, Owner, ToyMagnets.com, www.ToyMagnets.com

42 November 2003. The Google ranking algorithm range. The SEO world went into a spin. The loudest noise came from those who dropped ranking places. Some very valuable lessons emerged from this.

Firstly, it is vital that you have a diverse range of traffic generating methods for your Web site. That way if one stops working, the others continue to work. Next, a sound optimization strategy is based on supplying useful content to searchers and search engines. You can build a page to rank well at a point in time but if the page does not contain useful content it won't do you any long-term good. If it gets a high ranking and doesn't offer what the surfer wants, they'll click away in a blink of the eye. However, if you have useful content, the page will attract interest and links even if the search engine positions change. For example, a "how to" article is always going to be useful and of interest.

Lastly, you need to have contingency plans for when things change. So, if you depend on Google for most of your traffic, develop a plan of what you would do if you were suddenly removed from their index altogether. It's a scary thought, but not as scary as it happening and not having a plan to cope.

William Siebler, CEO, Resolve Marketing, www.themarketingmentor.com

43 Internet marketing is often a matter of quality over quantity in terms of the audiences you reach. We had one SEO client (a small specialty real estate consulting firm) whom we were initially concerned about due to their relatively low site traffic in the months following their SEO campaign — that is until we contacted them to check in and they

excitedly told us how pleased they were with the results (which also underscores the importance of post-project client communication). It turns out they had landed several high-paying consulting jobs from individuals who found them on search engines using some of the more obscure niche terms that had been targeted. At their rates they made their ROI ten times over with their first online client!

Jason Summerfield, Principal, Human Service Solutions, www.hswsolutions.com

44 Does search engine traffic lead to conversions and if so, what is the minimum conversion rate we should expect? After three months of tracking a sample of 10 Web sites, I was able to conclude that search engine marketing did lead to conversions. The conversion rates across the 10 sites varied between 1.5% and 3% from the entire search engine traffic with some individual keywords and pay per click campaigns reaching as high as 60%. At a glance this looks great; these conversion rates are better than many other direct marketing activities. But when we scratch the surface, we can see that these figures are not as good as they seem for all Web sites, particularly in the pay per click search engines.

The next question stood out like a sore thumb. What is the lifetime value of a customer acquired via a search engine? To simplify the task I first split my customers' Web sites into two market segments — subscription markets and repertoire markets. In a subscription market, customers generally subscribe to a product or service for an extended period of time, for example, a financial loan or sales lead in a service industry. In a subscription market, the customer will typically enter into a contractual agreement with their supplier and, in some cases, invest some of their own time into developing a strong working relationship. I spoke to all our customers in subscription markets and found that return on investment was at acceptable to high levels.

In a repertoire market, the customer will buy from a repertoire of brands (more than one brand). Each time they enter the market they are free to shop around again. An example of a repertoire market is a travel Web site or an online DVD retailer. Here the customer is not contractually locked in beyond the initial purchase and is free to make their next purchase wherever they please. It is also possible that a customer may include a search engine in their repertoire and use it to find the best deals. It is in repertoire type markets that I found return on investment was low to negative on the initial purchase, so if a repeat purchase does not occur you will be losing money from your pay per click search engine traffic. This means it is crucial that you know your repeat purchase rate if you are selling in a repertoire market and purchasing pay per click search engine traffic.

I can honestly say that getting the traffic is undoubtedly the easy part. The next challenge facing this business is learning to turn this traffic into loyal, satisfied repeat customers. The lesson here is not to jump straight into search engine optimization and search engine marketing — the free ride is over. It is expensive to get good exposure in search en-

gines. Before you start, make sure you are absolutely clear on what your marketing objectives are. Do not undertake any kind of search campaign without adequate tracking measurement and advice. Don't waste time and bandwidth on repetitive ranking reports — it is not a valid measurement. Work out how many clicks it takes to get a sales lead and how many leads convert to a sale. When you work this out you will know exactly how much you should pay per click.

Frank Grasso, Managing Director, e-channel online, www.e-channel.com.au

45 The one thing that we didn't necessarily learn but rather was reinforced over and over this year is that getting overly creative with your marketing offers on the Web, in a medium where you're competing for the time used by an individual more so than any other medium, tells us that usually the most simple, clearly communicated offer works the best for us. Every time you introduce a new element to a subscription offer or sales offer, it's another element that can take just as many people away from the purchase decision as has led them to it in the first place. On the Web, the user is always only a click away from no longer giving you the attention.

Bobby Burton, Executive VP, Rivals.com, www.rivals.com

46 This year we negotiated a large multimedia package with a couple industry publications on behalf of a client of ours. The package contained traditional print and direct mail but also offered several Internet tactics. Having not utilized the Internet in the past (outside of common company Web pages) we, and the client, were excited about the opportunity. However, we ran into some problems with our Internet banner ads. When the first month reports came in, the click numbers were incredibly low. Well, it's the first month we were told. Then reports came in for the next month — incredibly low numbers again. Now we were getting concerned.

After much discussion with the Web site owners and with our internal agency team, we realized there was no reason for viewers to click on our banner ads. They were attractive ads, well designed and well built. But they were simply banner-sized product ads that outlined FABs. We apparently didn't think strategically about these ads. So back to the drawing board. Our internal team met to discuss the problem and designed several new ads with some sort of pull (reason to click). It can be argued that the initial ads were still making impressions but we really wanted to see click throughs. After a month of running the new banner ads the reports confirmed our thoughts. The numbers were much better and considered a success. This experience led us to a few realizations:

1. All ads need to be thought out strategically, no matter how simple or unimportant they may seem. If we wanted click through numbers then we needed to give viewers a reason to do so.
2. Ads for different media need to be handled differently. Revising print ads into banner ad size and format may not work.

3. We're not always right and don't always create the perfect ad every time. But it is important to step back, examine the problem, and create a solution.

Learning Account Exec., Milwaukee Area Advertising Agency

47 Ask any site on which you run advertising what the average click rate is for the places you'll be putting your ads. There's a huge difference in response in different areas of every site that can make a difference in success of your campaign. Also ask that site what their overall average rate is — this is important if you're buying CPM!

Susan Bratton, VP Sales & Marketing, Mailblocks Inc., www.mailblocks.com

48 The main quote for the year is "You get what you pay for." As a major advertiser on the B2B side I have taken great amounts of time, effort, and expense to strike the perfect deal. Always trying to drive down cost and improve my ROI. The perfect low cost deal is not always the light at the end of the tunnel. Low cost doesn't always mean great reward. Most of the time low cost means low quality. The good brokers in the industry will find a good fit. The one-timer brokers will take the low cost buy and find the perfect fit on a porn site or an incentivized section of jokes-r-us. Lesson learned for 2003: know your brokers, study the properties being reviewed, request full site lists from property networks, don't be scammed by the term Network, and be flexible on the cost. If they beg off showing ALL the sites, be flexible on the cost.

Anonymous, VP Advertising, Business Services

49 Bandwidth is no substitute for great creative. Simple Web pages load fast. That's obvious. Less visible is the time, craft, and inspiration that goes into simplifying a page to make it fast — fast to load and fast to understand. And it's hard work. You might think that broadband takes away some of the pressure to build fast, easy-to-understand pages. It doesn't — it just makes designers, writers, and marketers lazy when they start to think that way. There's no substitute for great creative.

Will Rowan, Director, Morning Papers, www.MorningPapers.com

50 Long vs. short sales copy online is always a hot button topic. I've learned three essential lessons through testing:

1. Long vs. short is in the eye of the reader.
2. Long copy provokes more emotion, particularly when the reader doesn't like it.
3. Long copy sells even when people say they don't like it.

In two different surveys of Web sales pages, 60% of my readers said they preferred short copy; 40% opted for long copy. Pressed for details, those who chose short admitted the persuasiveness in long copy of lots of testimonials, lots of details that allow you to scan, lots of action, and places to click. (Direct quotes from the survey.) The take-home? Know

your audience. Adjust your copy length and style to your audience's motivation and state of mind. Keep testing... And realize that, as in real life, readers on the Web may say one thing and do another.

Debbie Weil, Publisher & Editor, WordBiz Report, www.wordbiz.com

51 I learned that in an impulse-buy/subscription environment, conversions can skyrocket if you can do the following:

1. Dynamically appeal to your traffic.
2. Streamline your offer as much as possible.
3. Get that customer to click the join button and enter their credit card info with as few barriers as possible while reinforcing membership benefits all the way through.

Howard Goldberg, Major Accounts Exec/E-Commerce Consultant, Internet Billing Company, www.ibill.com

52 I've long thought the best approach to managing an affiliate program was to have a smaller base of affiliates in order to better manage the program, reduce the probability of fraud, and communicate with the affiliates. In 2003, it became clear that the quality over quantity approach is downright essential. With more and more affiliate programs stipulating how their affiliates can utilize PPC search engines to promote affiliate links, as well as the potential liabilities of affiliate spam, it's imperative that affiliate managers know how each and every affiliate is promoting them.

Shawn Collins, Director of Affiliate Marketing, ClubMom Inc., www.clubmom.com

53 Ninety percent of what's going on inside the world of affiliate marketing is simply gaming the system. It's shocking how few marketers understand the mechanics behind HOW affiliates send traffic and the resulting sales or business leads. Not only is there a sales at any cost mentality involved here in terms of objectives, inherently the affiliate marketing mechanism itself encourages marketers to be ultra-aggressive in giving affiliates "search engine carte blanche"... thus polluting the very waters in which they swim. Those who pollute the best stand to benefit (financially) the most — short term. As a result, we as marketers risk failing in our stewardship of long-term concerns such as brand development and customer experience.

Jeff Molander, President, Molander & Associates Inc., www.molanderassoc.com

54 I've talked with at least 100 companies in the last six months and 90% of them don't have a clear and universal definition of what a sales lead means. These companies (the ones I've talked to anyway) are crippling ROI by not asking this essential question. What is a lead? Steps to defining a lead...

1. Meet. Get those who are helping your company gain more customer relationships in a room or conference call. You need a lead who has street credibility and will set the tone that we're in this battle together.
2. Ask the question, What do you consider a qualified lead? Now shut up and listen. Everybody must play.
3. Don't stop there with one meeting. Summarize the notes from your meeting and have another meeting. Is everyone satisfied with the definition? You need a strong consensus.
4. Publish the Universal Lead Definition everywhere so people know.
5. Close the loop. Sales/Marketing should meet bi-weekly to review if the lead definition is accurate. Ask questions like this... Was X a lead? Did they enter the sales process? Why/Why not? What else would you like to have known about this lead? How can we improve? What should we stop doing? What should we start doing?

Brian Carroll, CEO, InTouch, www.startwithalead.com

55 My lesson learned was to start tracking a bit more closely the effects of my marketing efforts so I could focus energy and funds on the areas that had the best return on investment. But I try not to let the numbers run the show. One of my marketing efforts has greatly increased my sales of expensive wooden floor frames. But these people don't buy the first time they visit the site and my tracking isn't sophisticated enough to pick up those people who buy on their second or third visit to the site. If I had cut this ad campaign strictly based on reported ROI, I would have lost sales. So I make sure to temper my decisions with some practical judgment. If I'm selling a lot of floor frames I'm going to assume my marketing had something to do with it, even if the numbers suggest otherwise. However, certain other campaigns, like my tapestry push, have been surprisingly ineffective from a sales standpoint. If I hadn't been tracking results I would have continued pouring time and/or ad money into those efforts

Catherine Bracken, Owner, The Cottage Discount Needlework,
www.discountneedlework.com

56 When evaluating quantitative data expressed in percentage (terms) be sure to convert these percentages into absolute numbers. What can appear to be a very small percentage can sometimes translate into a large impact on the number of actual clients.

Rod Balson, Director

57 As specialists in helping nonprofits that struggle to get people to care about their cause, we've learned a secret for boosting media coverage. You probably already know that media stories about an organization's challenges and successes can touch people's hearts and move them to action. But what makes reporters respond to news releases? Distinctive photo ops. While on retainer for a school system we produced 22 newsworthy releases. Though most resulted in newspaper, TV or radio

coverage, releases that described photo opportunities were 55% more successful in attracting reporters and yielding multiple media mentions. Follow these photo op tips to get reporters' attention:

- Put words such as "NEWS RELEASE — PHOTO OP" above your headline.
- End the release with your photo possibility.
- Highlight this section with bold type and/or borders.
- Describe who will be doing what — when and where.
- Designate a clear time frame, usually half an hour.
- Consider adding a sentence such as "Alternate photo times may be arranged from..."
- Make sure you have your photo subjects' permission ahead of time.

Joan Huyser-Honig, Partner, Huyser-Honig Creative Services: Telling your stories advancing your cause, www.hhcreatives.com

58 In the Hispanic market there is a big difference between advertising in Spanish Newspapers, which are either home delivered or on newsstands, and other Hispanic insert media. A book publisher can place an all-Spanish piece into newspapers in the top Hispanic markets and get very high responses on their solo insert. For insert media in a shared environment, the same rule doesn't apply. The advertisers with the highest responses in the co-op programs use a bilingual piece. Obviously, the same person is not seeing the offer. One of the Hispanic papers states that 71% prefer to, or can only, communicate in Spanish and 87% speak Spanish at home. The lesson learned is that specific targeting to an ethnic market is key. Just because an advertiser mails to an ethnic name doesn't mean that all members of that household speak or read that language. If an advertiser goes into an ethnic newspaper they can be more confident that the audience wants to see their offer in the same language as the paper.

Arlene Rosen, President, Alternate Response Associates,
www.alternateresponse.com

59 What we learned in 2003:

1. Although somewhat diminished, email is still the best marketing tool to generate leads.
2. Second best method is the use of voice mail. We telemarket our customers during off hours trying to get their voice mail. Like email, it always gets personal attention and can be easily handled. Like the subject line in email, the first five words spoken to a voice mail are critical.
3. If reselling another company's products, begin by selling the value of your company, then the other company's product. When selling the other company, you are opening yourself up to encouraging the customer to call that company who may or may not recommend you for the sale.

4. Regardless of the state of the economy, there is always money being spent. Getting our rightful share is the challenge, not the economy.

5. Don't be afraid to recommend someone else's product when necessary. Integrity still works and is often rewarded.

Kevin W. Mahon, Sales & Engineering, KEMP Technologies Inc.,
www.mastersolutions-us.com

60 This year we've done a lot of different types of marketing campaigns. Some successful, some not so much. The biggest lesson learned is something we've known but had continued to put on the back burner — data cleanliness is key to a successful campaign. It does not matter if you are talking about direct mail, email, fax or telemarketing. Without knowing the right person to contact or what that organization does, the message cannot be targeted or personal enough to make a difference. In 2004, our main initiative will be to clean our databases and streamline our direct marketing processes.

Jana Gauvey, Production Manager, Avatech Solutions, www.avatechsolutions.com

61 We must look at the Web site and the online ordering process as a simplification of the sales transaction and not the only motivating factor for the customer buying decisions.

When selling traditional retailers B2B online, one must reach them through traditional advertising mediums, in addition to SEO. Once you have effectively created the perception that you are the company they should do business with, they will use whatever means is easiest to buy.

Larry Brezenoff, Vice President, Loren Casting, www.loren.com

62 It's about blocking and tackling — and doing it over and over. Sure, I love to develop new marketing strategies and I do come up with a few wiz-bang, cool, highly creative ideas off and on. But results come from staying on my clients to do the blocking and tackling day in and day out. It's hard work — not magic — and not about perfection.

My client is in the process of doubling their office space — not bad for a software company in Nashville, TN. This company's marketing is not just about their site — it's about the regularity in doing multiple marketing things competently and coordinating those efforts to play off one another. You reap what you sow in the world of marketing like elsewhere — and it rarely happens overnight. It takes work and discipline on a consistent basis using multiple vehicles, whether those are Web site and online related marketing (search engine optimization, banners, etc.) email campaigns, direct mail, print ads, other media, trade shows, telemarketing or others.

Although there's always an exception, it's almost never a matter of doing that single penultimate creative thing or spending hundreds of thousands of dollars a campaign on expensive media. Rather, it is a matter of providing clear, consistent, interesting messages and marketing regularly versus sporadically and halfheartedly; monitoring results over

reasonable time frames (that may often be at least six months if sales cycles take that long); and adjusting the mix continually — and having patience and perseverance. Personally, I now try to avoid one-time marketing “projects” because they are too often ineffective and a waste of a client’s money — when done in a vacuum. I’ll look bad and the client will be disappointed.

Tom Ranseen, Principal, NoSpin Marketing, www.nospinmarketing.com

63 We have found that in our campaigns for 2003, a multi-campaign model works best. Online marketing can only go so far and since we try to target nearby business, it is harder to conduct online. However, we cannot pass up the power of Web analytics and tracking the offline results. Therefore we set up landing pages for magazine and postcard ads. The ads were the same but the copy was changed to appeal to the audience. The offer was ultimately the same. It worked quite well.

Chris Boothe, Managing Partner, FavorWare Corporation, www.favorware.com

64 Follow the Money. I teach this lesson every day to publishers who want to sell products and services to K-12 schools. Usually follow the money means targeting the mid- to large-sized schools because funding flows according to the number of kids attending that school. The more kids, the more money. But this year I learned that you need to keep an eye on the bigger picture as well. A new education law not only changed the amount of overall K-12 funding, but it also changed where that funding was to be spent. The effect of this change meant that certain types of products would sell better than others — regardless of the total amount of money available to purchase. So if you are following the money, be sure to track the entire funding chain so you can see the broad picture as well as the day-to-day effect it has on the ability of your customers and prospects to purchase your goods and services.

Carol Ann Waugh, President, Xcellent Marketing, www.xcellentmarketing.com

65 Customers attribute human qualities to the businesses they interact with. We often hear businesses themselves referred to as friendly or stuffy or complicated or hardcore. This became incredibly clear during a re-branding exercise that we engaged in during 2003. Managing a brand after all is really an attempt to define the human qualities that interactions with the company should conjure up. Our experience was powerful — we decided who we wanted to be and how we wanted the world to think of us and are now building a new brand around those ideas. What made this all come together for the team members participating in the project was a simple trick: think of the company as a person. It is the feelings that customers and prospects have towards that person that define what the brand is.

John Girard, CEO, Clickability Inc., www.clickability.com

66 A long-term business relationship is like a marriage. Over time it's the little things that chip away at it — the way no one answers your call when you call at 4:45, the way your orders always take the maximum amount of time to arrive. Those minor annoyances add up over time — compounding until customers say enough! Sure, we all know going with the competition will only be great for that initial honeymoon period, but after a certain point we don't even care — we just want to get out of the old relationship.

This year, one of our best customers decided to put a stop to the customer attrition that comes from those little details slipping through the cracks. Together we put together a campaign to demonstrate the company's core values and they worked on the little details that they'd let slip over the years. The results? They've lost 35% fewer customers overall this year and each month the numbers look more promising. What's been most surprising, though, is that those customers they've kept have been their best source of new business.

They didn't start the campaign to increase referrals and yet that's precisely what happened. Turns out those customers who are most apathetic about a business can be transformed into a company's best evangelists.

On a recent survey, 92% of the customers who indicated they had been considering the competition at the start of the year said they not only had no plans to take their business elsewhere now, but would recommend (or highly recommend) the company to a friend. And of that same group (of customers with intentions to leave) 82% said they already had recommended the company to at least one other prospect. In the end rescuing a company's relationships with its customers is much like rescuing a marriage. Rebuild the foundation, pay special attention to your values (and make sure to communicate them) and attend to the details.

The lesson I learned (or perhaps relearned) from this campaign was when you stop focusing on the honeymoon period with new business and focus on strengthening your relationship with existing clients, you'll find you do business with more of both.

Jessica Albon, Focusing Chief, The Write Exposure, www.designdoodles.com

67 Care more for the customer than you do for your dollar. The money doesn't matter if the customer is not joyous for having dealt with you. This means all touches, and there should be many, should be about helping the customer solve the problem of the moment or the future, whether it relates directly to the sale or not.

Gail Howard, Founder, Biz Help Central, www.bizhelpcentral.com

Part III: Office Politics, Teamwork, & Your Career

68 On The Advertising Show we've had the pleasure of interviewing the industry's most high profile and influential marketing communication executives. And if there's one recurring theme I keep hearing, it is the following: Marketing is too important to be handled by the Marketing Department. To successfully advertise and brand a company's products or services requires the involvement of the people at the top. Without the CEO and other C-level executive participation, your company's advertising/branding campaign will not be effective because the advertising/branding promises will not be successfully delivered by the rank and file of your company. Your customer, not your advertising, decides whether their experience matches your marketing communications. If it does, then your advertising/branding effort was effective in growing or reinforcing your brand. If not, you just wasted your money.

Brad Forsythe, Creator & Co-Host, The Advertising Show,
www.theadvertisingshow.com

69 Lesson: there is no point in changing customer behavior if you don't also change sales team behavior. In my last five years at a one of the large software companies, we ran campaign after campaign that brought in thousands of "contact me now" responses. And we found sales still only followed up on the names already in their Rolodex.

Everyone knew the way to fix this behavior was to engage marketing and sales in the design of the program: with sales handing over the names they already knew and working with marketing to design programs to reach them. We had some successes in the mid-market around this but little with the lead sales reps on our most important accounts.

I have since moved on to work for one of the big four tax and assurance firms where we have that level and agreement, and the effect on marketing that comes from it is significant. CxOs show up at your events; the quality and depth of your collateral becomes, by necessity, more in depth and useful to your audience; and you find suddenly that you don't have to chase sales people to be part of your programs; they chase you.

In the new year, here are some suggestions: discuss with your manager proactive ways that marketing can reach out — team individual people with lead reps on major accounts to build relationships and do whatever you can to track actual sales response per lead to your programs to find gaps, even if you need to use an outside agency with your own marketing budget to do so. When it becomes possible to do so, use that same resource to track the actual financial gain from the marketing activity.

Over time you may find the programs you run to be a lot more rewarding, both mentally and financially for you and your company.

Richard A. Rogers, Director Software and Services Marketing, KPMG LLP (US),
www.kpmg.com

70 As tempting as it is to keep yourself sealed up in some hole to slave away on various projects, true progress results from explaining concepts and ideas to people around you who can both challenge your thinking and offer avenues of support. Success is idea execution and frequent brain dumping!

Julie and Colin, VocabVitamins, www.vocabvitamins.com

71 We were working in conjunction with a much larger firm to market our software. They had primary marketing responsibility for our combined software package. Their marketing budget and infrastructure were much larger than ours. After product launch we felt like there was not enough dynamic follow-up (i.e. inquiring phone calls, emails, etc.) and offered to do the work for them with our limited resources. They were hesitant because of company policies but then relented and offered to help fund the effort at their facility. We accepted the offer. In the meantime our partner notified us that they had decided to perform a formal follow-up to the product distribution. We are still part of that equation.

LESSON: Always maintain open/honest communication with all of your team, whether they are in your organization or part of a virtual team effort. I've left off all identity to respect the sanctity of our relationship.

Anonymous, Vice-President

72 Shortly after becoming the 1-800 CONTACTS Affiliate Manager, I realized that Utah had a large number of non-competing large online companies and felt that forming an association had amazing potential. I began contacting the affiliate managers for each of the Utah-based online companies and we began formally meeting in November of 2003. I believed it would create a good channel for sharing valuable information and I learned that this concept was universally accepted by all of the affiliate managers I had contacted (most of them were eagerly awaiting the creation of this type of group). We quickly established a monthly meeting and already have a large number of participating companies.

In our first meeting we discussed the goals of the association and established a few guidelines. A few of these guidelines were:

- In order to keep the group productive and manageable, we agreed to limit attendees to just one representative from each of the participating companies.
- Meetings are structured to be similar to a discussion forum with one mediator overseeing the discussion.
- Each meeting has a general agenda, which helps us fulfill a purpose but the agenda's main purpose is to ensure the meeting is productive and has a basic structure.

Despite its infancy, RMAMA (Rocky Mountain Affiliate Marketing Association) has already experienced amazing results. Meetings start at 1:00 and by 1:10 we are already deep into the heart of discussion topics

which are vital to rev-share marketing. We have found the group to be beneficial, especially because we have created an environment of trust (backed by NDA's). It allows us to share:

- Information specific to commission structures or incentive programs that are working.
- Help when evaluating the performance of available Affiliate Solution Providers (CJ, Linkshare, Performics, Befree).
- Reviews on software or methods, which allow us to manage and grow our programs.
- Keeping members informed of legislation that may impact our partners or programs (spam, etc.).

The association is very helpful because we each have constant access to feedback from 10-15 other reputable online companies. Chances are that if a member is interested in trying something new, another member of the association already has some experience with that subject. We can therefore bypass the under-performing ideas and go immediately to the proven material. In my opinion the benefits of this type of association are priceless.

Josh Aston, Affiliate Manager, 1-800 CONTACTS, www.1800contacts.com

73 Starting my own blog was the beginning of several other things; I met — virtually — with other PR people from around the globe, discovered yet another technology called RSS, and became involved in a kind of European anti-spin movement. The ultimate result from my blogging and RSS experience is that I am now part of a workgroup (at the company I work for) responsible for rethinking our online PR approach on a worldwide basis. Above anything else, I learned to express myself online with a true voice and will certainly continue to do so in my daily job.

Philippe Borremans, PR Manager, Anonymous,
<http://philspplace.blogs.com/philspplace/>

74 You never actually hire the person you meet in an interview.
Donna Bowling, Partner, Mindpower Inc., www.mindpowerinc.com

75 In 2003 I have learned that the amount of money you make really doesn't matter when you're working for a firm that doesn't appreciate or acknowledge your contributions or talent, no matter how much it is. Therefore, I know now that the money isn't everything, as I believed before. I'm currently employed by a firm that appreciates and recognizes not just mine but also all employee contributions. It may not pay as much but I couldn't be happier. When someone recognizes your hard work and compliments you on it, there's no better feeling!

Rose Valenti, Marketing Coordinator, Joe Percario Contractors Inc.,
www.percario.com

76 When it comes to career choices, trust your instincts. In January of last year I left the agency side of marketing to re-enter the corporate world. Company stability was a priority on my list. When a friend asked me to join him at his start-up software company I was hesitant. While funded at the time, some of the executive management had a history of starting tech companies and selling them off. However, my friend assured me that this company was on a track of managed growth and I was impressed with the company's president, who had a track record of growing successful companies.

Two months into the job there was a sudden change in regime. The board replaced the president and within two weeks the company direction turned 180 degrees. I saw red flags and started exploring other employment opportunities. My friend implored me not to leave, promising that even if the company were sold, I would make plenty of money. The idea of possibly riding out the slow economy on the potential money I could make was appealing, but my instincts told me it was too good to be true.

So I forged on with my job search and was fortunate to land another job offer in a few weeks with a company that had been around for 15+ years and had managed to be successful while remaining small — real managed growth. I was at a crossroads where I could ride out the wave at the start-up or take a safe route with the other job. I decided to take the safe route and accept the other job.

Shortly thereafter the start-up company secured millions of dollars of additional funding. I immediately questioned if I had made the right decision. I was happy with my new position but also wondered if my aversion to risk taking had been a mistake.

A few months ago my former company went under. No one made the fast dollar they had been banking on. I was relieved that I trusted my instincts and remembered that the economy, while improving, is still not what it used to be. I'm glad I followed my instincts to safer pastures.

Corrine Solomon, Marketing and Communications Manager, Time America Inc.

77 If you're going to relocate for a job, get a binding agreement that it is for a specified time before either party can nullify the agreement.

Scott A., No Title, No Job, Nothing to Show

78 Marketing metrics are hard to implement from scratch, but very powerful when finally implemented. In just about one year we changed from having no ability to measure how many leads were produced from our Web site email campaigns or print ads. We also could not measure which campaigns contributed to sales opportunities or revenue.

Over the last year we implemented a marketing automation software solution (Pivotal MarketFirst), integrated it with our CRM system (Onyx), and deployed MarketFirst-generated forms on our Web pages to collect leads. Because we now track every lead to a Campaign code we can run

reports on leads and where they come from every week. We can tell how many came from which campaigns, what sales status they are, and even how much revenue by campaign.

Because we can report on all these metrics, it's no longer some soft, vague, ambiguous notion of what the marketing department contributes to the company. We have a newfound respect from upper management, sales staff, and product management. Coincidentally (?) I have more control over budget dollars and I just got a promotion.

Anthony Sanchez, Sr. Manager Marketing Communications

79 Metrics don't lie! After trying to teach our business Web-best practices, we implemented a new metrics program for our online campaigns. The new metrics graphically illustrate what links visitors clicked on and give us a funnel analysis of where users dropped off the conversion path. Backed by hard data, our business was ready to listen and reevaluate the way they design their campaign landing pages.

Teri Ann Helfrich, Internet Marketing Manager, Becton Dickinson & Company, www.bd.com

80 As predicted, email has engulfed all of our lives and can be a detour to getting things accomplished on a timely basis... Best lesson I have learned this year is to discipline myself to answer/address email only twice daily. I may miss an important media opportunity or timely marketing tip but, overall, it is helping me to take better control of my life and operate on my time frame, not everyone else's.

Linda C. Haneborg, Sr VP Marketing/Communications, Express Personnel Services, www.expresspersonnel.com

81 It is the equity that marketing builds within the organization rather than the equity that marketing builds with customers that often makes the difference between the CEO appointing marketing to a seat at the strategy table on the one hand — and powerlessness and marginality on the other. Therefore, I have learned that it is critical to develop the marketing brand within the organization.

Roy Young, Principal, Making Marketing Matter, www.makingmarketingmatter.com

82 One of the best ways I've found to keep my staff motivated is to set company wide goals and individual goals with appropriate rewards for when the goal(s) is met. This not only helps motivation, but also keeps the company on track with our marketing plan.

For example, our current company-wide goal is to sell a certain number of a particular service we offer. I've made sure everyone knows what their role is in meeting the goal, whether it be directly working with customers or an indirect supporting role, and how it relates to making the sale. Once the goal is met, all staff will receive a pay raise, which seems to have piqued their interest. It's quite common to overhear staff talking about the reward to each other.

So far this goal/reward technique has worked well and we plan to continue this indefinitely. One thing I have learned so far is to have a lesser reward lined up if the goal is not quite met to acknowledge the amount of effort they put into reaching the goal.

Amy Kinney, Chief Operations Officer, Advantagecom Networks Inc.,
www.simplywebhosting.com

83 In the past year I changed jobs from an interactive agency Project Manager and copywriter to a Marketing Communications Manager in a global management consulting company. I remember, when I applied for the job, wondering what the firm did. I just knew the job description fit and they paid well.

Creating our brand definition was key and, once all the executives agreed that we were a global management, consulting, and investment advisory firm, we were ready to move on toward flushing out the good stuff. Now we have a uniform description that allows us the freedom to switch vertical campaigns at random. We are also overhauling our Web and have a program to manage and measure things like keywords, link popularity, etc.

The main thing is by implementing programs that helped us define our brand and measure the success of various campaigns, people are excited about marketing the company now. It has actually become common for the executives to contribute new ideas, events to attend, the success or progress of a speaking engagement, and so on, that they previously didn't because now we are all on the same page.

Katherine Smith, Marketing Communications Manager, Interliance LLC,
www.interliance.com

84 Employee confidence building is not often ever identified as a marketing strategy. This year reinforces why it should be.

Background: survival mode network software company with innovative products and good people. Issue: survival mode strategies retarding business — low-ball pricing; low-end customers; selling customer wishes, not developed products; do anything for an order. Solution: outside perspective, bit of market research, and confidence-building leadership — literally reinforcing through actions and words that “we are good; we are worth every penny; we will do good business with customers who value us; we are prepared to lose orders from those who don't.”

Impact: average deal size increase of 300%; out of survival mode in six months; profitable; cash in the bank; Fortune 500 customers. Not just a survival mode strategy. Will work for any good company trying to get to the next level.

Jim Crocker

85 At the start of 2003 my firm, a midsize private equity administrative outsource, had reservations about performing any kind of marketing. We had no in-place “Marketing Strategy” and all marketing and PR was performed on a project-by-project basis. Still, my team (three people) believed that if we could develop strong, consistent branding (brochures, ads, demos, collateral, direct mail) over the course of the year we might be in a position to exhibit in the fourth quarter. By September we’d gotten the green light to exhibit at a national conference. Bolstered by the materials we’d created, as well as a full-page trade ad, our exhibit performed beyond our expectations. We returned home with 14 solid prospects and compliments from our competitors. Our success at the conference led to approval of a full-blown marketing strategy and good-sized budget for 2004.

Alex Bernstein, Associate Director of Business Development, Northport Partnership Management LLC, www.northportpm.com

Part IV: Business Building Advice for Marketing Consultants & Agencies

86 I learned that success, while necessary, isn't sufficient to convince many skeptical business executives and college administrators that 20% to 30% of their marketing budgets should be earmarked for search engine marketing. To achieve this lofty goal we need relevant benchmarks.

For example, our pilot program tripled applications to SIS in under a year. This prompted the Provost to invite us to address a meeting of all the deans and most of the administration.

This helped to make the case for search engine marketing, but it didn't convince anyone else in the room to start programs of their own. However, the light bulb went off when we presented two slides from the university's own WebTrends reports. The first showed that search engines had generated 24% of the visits in November to the pages about SIS on their site. The second slide showed that search engines had generated just 3% of the visits in November to the University of the Pacific's entire site. In fact, just 20 optimized pages about SIS were generating 39% of the university's total search engine traffic while SIS represents just 4% of the university's student body.

Following the meeting, the Dean of the Eberhardt School of Business also hired us and the University of the Pacific's Associate Provost for Enrollment asked us for a proposal. What did I learn from this? Early success got us in the door, but a relevant benchmark sealed the deal!

Greg Jarboe, President and cofounder, SEO-PR, www.seo-pr.com

87 There is an education curve at the beginning of a client relationship. Very few people understand what goes into meaningful media placement. When a client wants clips NOW and they just hired you last week, they are not just being impatient. They are demonstrating that they do not understand what goes into making news (like having something to talk about with reporters).

The tip is to educate clients on the need for empiricism in order to develop a new kind of credibility with the reporters you need to reach for them. Clients in almost any vertical will think they're buying your Rolodex — that's not a new idiom. But you'll really add value for them if you educate them on WHY they need to provide hard hooks as media fodder. It'll enable you to get better results for them while educating them and making it easier in the long run for them to give you what you need to be successful on their behalf.

This may seem like a no-brainer to veteran PR types. But the juice is in the education part. Now I make this step very clear in every proposal and won't work with clients who don't get it.

Mark Naples, Managing Partner, WIT Strategy LLC, www.witstrategy.com

88 One thing I came to realize about the field of public relations is it does not matter where you are located or what organization you are working for to receive attention from the media. After leaving an internship for a major PR firm in New York City and going to work for an independent author and private company in the Philadelphia market, I was worried I would not have the credibility to get the bookings that I would want. I quickly learned that the media actually were much more pleasant and willing to listen to what I had to sell them because I was working on my own and not from a firm in which they hear from ten different publicists a day. All you need is self-confidence and determination to get the media to listen to what you have to say and you don't have to be calling from a major city to receive any type of acknowledgment.

Olivia Swinehart, Director of PR & Communication, Indaba Inc.,
www.21laws.com

89 For those of you who, like me, are riding the range as independents/freelancers/business owners, I urge you to stick by your guns financially speaking. Case in point: I have (or maybe by now it's had) a small client in late '03 for whom I wrote a monthly HTML newsletter. Good project, good profitability, etc. I got a signed contract and a down payment before beginning the first issue — really did all the right things.

The problem came later when I loosened up my contractual terms and began releasing finished issues without being paid first as my own contract stipulated. By the time of only the second issue it was becoming obvious that this client would be a slow payer. I continued nonetheless. By the third issue it was already too late to stand on principle.

Bottom line: I'm out almost \$5,000 right now and even after a recent heart to heart with the President of the company, don't feel particularly confident that I will EVER see that money. Worse yet, I can never get back the time that I spent doing work for free. If that happens, I have nobody but myself to blame. Contracts and agreements exist for a reason. It isn't mean to enforce them. Just fair.

Dan Regan, Vice President, The Lightbulb Lab Inc., danregan@comcast.net

90 In a lackluster economy one of the biggest challenges any organization faces is retaining the business it has when growth is hard to come by. For boutique agencies like mine, it's particularly important because we operate on much thinner margins.

As we moved into 2003, we realized we were in a difficult position with a client who had been with us for five years. The client was increasingly nonresponsive and we were no longer being kept in the information loop — essential if we were to continue to provide value as part of their communications team. They were moving in a strategic direction that was difficult for us to support on the PR front without their input. The nonprofits internal marketing team was increasingly bowing to the

squeakiest wheel on the board of directors, who had unrealistic expectations of PR's ability on its own to fuel growth of a fledgling new business unit. And despite increased responsibilities, the client hadn't agreed to an increase in our monthly retainer in three years.

I was reluctant to give up a client whose check came in like clockwork but finally, in March, decided our sanity required we resign the account. An advantage of business ownership is the greater ability to take a risk. I weighed it and decided that losing my executive on the account was a greater risk than losing the client — and I valued the executive more than the client.

It was the right move. I learned that the stress of trying to satisfy a client who couldn't be satisfied had created substantial negative energy that was depleting our ability to focus on bringing in other business. I learned that showing loyalty to employees is one of the things that sets boutique agencies like mine apart from the big guys and I needed to demonstrate it. I learned to cut my losses without looking back. And the way new business has flowed in ever since, these lessons were my most important takeaways in 2003.

Sally Saville Hodge, President, Hodge Communications Inc.,
www.hodgecommunications.com

91 I learned that the greatest barrier to integration between offline and online agencies is not fiscal budgetary or agency size. It is, without doubt, psychological. Any agency wishing to achieve true integration must find a way to break through the us/them mindset, particularly in creative. Nothing will kill your chances faster than team members who don't respect what each party brings to the table.

You don't even need to understand what the other guys do — at least not at first — just respect that what they do is valuable. Then be open to and insistent that all parties be at the table from the get-go. Any divas who think they're too good to work on such-and-such or with so-and-so need to have their attitude adjusted. And that needs to come from the top. As my first Creative Director used to say, a good idea doesn't care who has it.

Karen Gordon Goldfarb, Creative Director, Real Branding,
www.realbranding.com

92 Agencies shouldn't win accounts. They should decide to accept victory. That means, of course, that they can also decide to decline. We pitched and won a promising industrial business to business client in 2003 and it seemed peculiar from the start. No matter how many assurances we got that the founder and CEO who had run the business for 40 years was entrusting a new generation to carry on, our gut instinct told us that the emperor indeed had no clothes.

Our pitch was greeted with universal acclaim. Executives and line managers all agreed that our vision was perfect for the company (and it was). Yet every time the CEO asked a question about strategy and tactics

and who would do what, it suggested that everything would have to pass muster with him... not his managers.

That's when we should have decided to thank them and let someone else claim the win. We didn't. We proceeded to do a comprehensive market study among current and former customers, which clearly identified the firm's strengths and weaknesses. We examined the competition to determine all the points of distinction. And we included economic indicators and trade conditions to ensure that our conclusions were valid.

When we presented our findings we knew we were doomed. The company's view was so out of touch with the customers' that it would have been impossible to implement anything that contradicted the client's point-of-view. After two rounds of modifications to satisfy specific requests from the CEO, we bowed out.

So, in your next pitch, be sure to exercise as much due diligence in understanding the company culture (and the true source of authority) as you do in grasping the market situation and the possible solutions to the client's problems. That means spending more time with line management and hearing (not just listening to) what they're really saying. As soon as you get an inkling that they have an overabundance of RNA (Responsibility No Authority) either make sure that you'll be working with the boss or gracefully decline to pursue the opportunity. You'll save money for everyone — for the client by ensuring that your efforts will have the right focus and for the agency by avoiding an unprofitable account.

Peter Altschuler, VP Marketing Strategy and Creative Services, Wordsworth & Company, www.wordsworthandco.com

93 If a major client falls on hard times and is forced to cut back budgets and cancel projects, it's important that you handle the situation sensitively if you want to carry on working with them. Make sure they know — tell them directly, don't assume they know — that you empathize and are happy to share some of their pain until they make it through to the other side. Sometimes pride and a sense of failure can lead to clients deciding that they would rather work with another agency than stick with the agency that knew them in their former glory.

Randy Weeks, Director, Palmer Hargreaves Wallis Tomlinson, www.ph-wt.com

94 The year served as an object lesson for me that nothing is given, there are no certainties, and it is absolutely necessary in our business to stay as nimble and flexible as you possibly can. And whatever you do, don't count on what's rational winning out.

We lost a long-time client, the foundation of our business, because the new CEO wanted his last agency (at his last company) to work with him again. Our performance record was exceptional, our costs lower, and our relations with our primary contacts locked down. Yet we lost the business.

We saw our second largest client move to follow one of our departing employees — a single staffer — because, as that client said, we don't want to raise a red flag to corporate. So the client moved the primary relationship to continue working with a recognized face, albeit a new name.

So we swallowed our pride, finished both relationships with our best work, and vowed to work with new clients without trying to build long-standing relationships. In and out becomes our mantra, not so much for survival reasons, but rather because — like jilted lovers — we don't want to get involved again; the potential for heartbreak is too great.

Mark Burris, Firestarter, BURRIS, www.burris.com

95 I was reminded this year that PR is more than media relations and publicity. It is the long-term development, management, and maintenance of relationships that can affect your business. How did I relearn this important lesson? Recently the phone rang with a new business opportunity. The prospect was interested in talking with me about handling PR for his company. He heard about me from someone who once worked for me years ago. I had lost touch with her but she apparently still thought highly enough of me to refer me to this prospect. I located her and thanked her for her referral. The real lesson is this: treat everyone with respect and manage your relationships because you never know where the people you touch will turn up. And you'll probably never hear about the bad things being said about you. By the way, I got the business.

Harry Hoover, Managing Principal, Hoover Ink PR, www.hoover-ink.com

96 When we started our Web design company we all had our hopes high, given our experience and skills. Then we learned the hard way that no matter how good our product was, we needed a LOT of effort to sell it. So we thought of a strategy to help us in the process, especially in cold calling. A lot of businesses give year-end gifts to their clients, some only to their best clients (and most of the time they're dull items). So we decided to take it just a little bit further and sent a creative gift to prospects prior to calling. It has worked wonders. The last gift we sent was a small, handmade wooden box filled with seasonal fruit packaged very visually attractive and a small card with relevant info for the prospect. The prospect (now a client) loved it. We now have in mind sending traditional stuff from our culture, like homemade chiles curados. We are being taken as very creative people, which we are indeed. ;-) So what I learned is that personal relationships are very powerful, especially when you take good care in nourishing them. Investigate your prospects and clients, their likes and dislikes and those of their families, the values of their company, and you can get great ideas for creative gifts (and don't forget to take into account your own company, your values and the message you want to give).

Ivan Vega R., Director General, Soluciones Inteligentes S.A. de C.V.,
www.soluciones.cx

97 Lesson learned: if you are really sure that you can deliver, tie your project compensation to client results, it makes the decision process much easier.

We have been talking to a company about redesigning their Web site, implementing a content management system. Company in case was Toronto Service Center — www.moving-storage.ca. Their old Web site did not deliver the results promised to them (and it was clear why — it did not look professional, was not optimized for search engines, was hard to update). So they wanted to take another shot at it but were very cautious.

We had to take a bit of a gamble to convince them. You cannot quantify a lot of things for a Web site redesign — like the improved perception from the better visual design. So we took one parameter we could easily quantify and said: You currently have X annual visitors.

If your new site does not deliver X visitors monthly within 3 months after the project completion, we will refund you 50% of the project cost. In a way it was an easy gamble — looking at the poorly designed old site and low usage statistics. On the other hand, we could only deliver if client would go along with our ideas and suggestions, and cooperate fully.

After that, the client signed off on the proposal. A lot of thinking and hard work went into the design content and interactive applications (online moving, quote request, online catalog, content management system). Now we are happy to report that site usage is at six times a month (72 times higher than the old Web site!). But now the client is a firm believer in the power of the Web as a business tool and is making plans for new applications to put up on the Web site, including e-commerce.

Dmitri Buterin, President, Bonasource Inc., www.bonasource.ca

98 A family bereavement in October led to a six-week virtual shut-down of the push-push-push marketing I'd been doing all year in my one-person business up until then. During that period, I put more effort than I had done for a while into daily practices of focusing on my personal Bigger Picture, on stilling my mind, on nurturing friendships and myself, on creating a space in which I might become aware of and be led to unrealised potential.

I eventually became very calm, focused, and contemplative. I achieved a better work-personal life balance. I slept better, stopped trying to create new ways of gaining business, and trusted more often that I'd done enough. I doubted myself less and valued my inner wisdom more. It felt like I'd begun to shine.

Within three weeks I began to attract creative events and creative people. New clients I'd never heard of and to whom I'd never marketed myself began contacting me. All kinds of people I'd never met wanted to

join my business make networking suggestions, offer support and encouragement, collaborate on books and projects, and learn from my own experience.

Old clients I'd not heard from for months or, in some cases, years suddenly decided they needed my skills and services, and most surprisingly, other services I'd designed but never promoted. How come?

(I've learned this before many times; why do I forget it so often?)

The river never needs pushing. Getting anxious about its flow does nothing to increase it. When I do try too hard to make things happen and become anxious about the possibility that they won't, my creative energy becomes dull and blocked. Somehow I swear this is transmitted to unconscious processes in the hearts and minds of prospective clients and my business dwindles. When, instead, I focus on my fundamental purpose and on giving service rather than seeking business; on polishing up my inner self; when I keep my personal energy bright; when I remain open to possibilities I cannot dream of or plan for; when I allow the space for the unknown potential and direction to unfold so that I can learn what life is trying to teach me and lead me towards; when I trust that if I prepare myself in these ways, opportunities will become available... they do!

Tom Watkins, Professional Coach and Mentor, EncourageMentors,
www.EncourageMentors.com

99 To do my work well I've learned it's my responsibility to earn my clients' trust; to partner with them; learn their businesses; respect the nuances of their industries. I learned that I am a marketing advisor; I am not a consultant. I've learned that just because you can (with the help of technology) create an ad or Web site or TV spot in 24 hours or less doesn't mean you should. It's my responsibility to make sure the message hits the mark by taking the time to take that critical second or even third look.

I've also learned that all advertising, no matter how beautiful and cutting edge, is pretty much worthless unless it advances the client's business.

Barbara Burbidge, Principal, The Burbidge Company,
www.theburbidgecompany.com

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