

THE MODERN MARKETER'S PLAYBOOK

**STRATEGIC INSIGHTS YOU CAN USE
NOW FROM 35 OF TODAY'S
MOST INFLUENTIAL INDUSTRY LEADERS**

BY THE DRIFT MARKETING TEAM

**“BE NOT AFRAID
OF DISCOMFORT.
IF YOU CAN’T
PUT YOURSELF
IN A SITUATION
WHERE YOU ARE
UNCOMFORTABLE,
THEN YOU WILL
NEVER GROW.
YOU WILL NEVER
CHANGE. YOU’LL
NEVER LEARN.”**

—Jason Reynolds

FROM INDIVIDUAL CONTRIBUTORS TO CMOS, EVERYONE WORKING IN MARKETING TODAY FACES THE SAME UNDERLYING CHALLENGE: THE MARKETING LANDSCAPE IS CHANGING, AND IT'S CHANGING FAST.

The rise of smartphones, messaging, video streaming, artificial intelligence (AI), and a host of other innovations has led to a total transformation in the way people search for and purchase products. As a result, the traditional marketing playbook is quickly becoming obsolete.

If today's marketers want to achieve success in the long-term, they need to adapt. Over the past decade, marketers have gotten too comfortable using the same three channels: blogging, email, and social. And while these channels, when used properly, can still drive results, a lot of marketing teams are seeing diminishing returns. This has led many teams, including our own marketing team here at Drift, to ask the question: What's next?

That was the driving question behind the creation of this book. And instead of trying to answer that question ourselves, we turned to some of the world's most influential and well-respected marketing leaders from companies like Slack, LinkedIn, Okta, and Vimeo. The result is a collection of expert insights and best practices that you can incorporate into your own marketing efforts.

From brand building, to hiring, to using video more effectively, inside this book you'll find advice for bringing every aspect of your marketing operation into the modern era. And hopefully, some of what you read here will help nudge you outside of your marketing comfort zone.

Thanks for reading.

the drift marketing team

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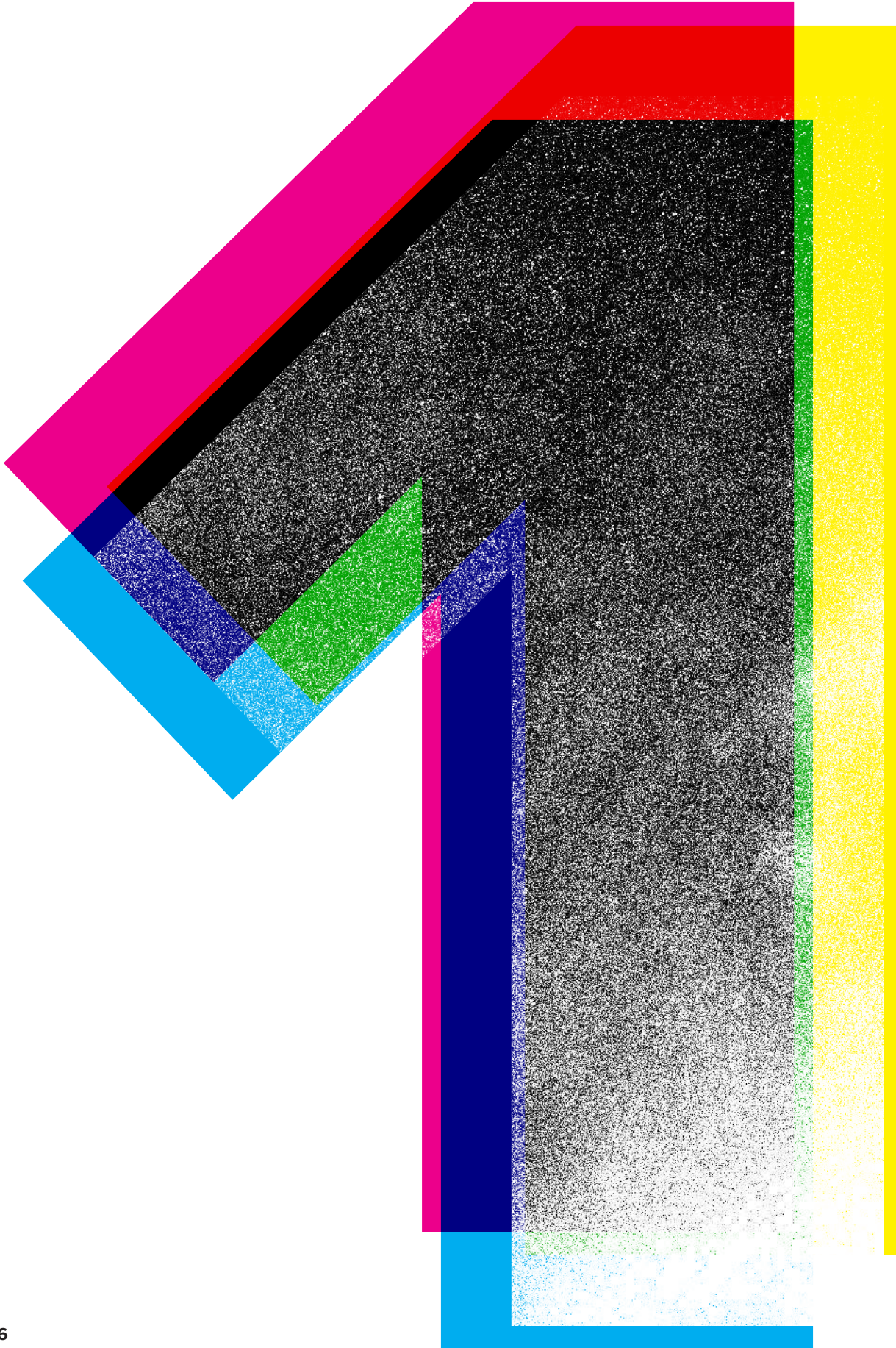
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BUILD YOUR BRAND

If you want to succeed as a business today, having the best product is no longer enough. Having the best price isn't even enough. These days, you can't differentiate yourself from the competition on product or price alone, because ultimately, those are things that your competitors can copy. Your brand, on the other hand, is something your competitors can't copy (no matter how hard they might try).

That's because a brand is more than just a logo or a tagline — it's an emotional connection between a customer and a company. And every single interaction a person has with a company, no matter how small or seemingly insignificant, has an impact on that connection. From seeing an advertisement, to reading a book (like this one), to having a conversation with a sales rep, all of these distinct experiences coalesce to form a person's perception of your brand.

In this section, our marketing experts explain why building a brand has become a cornerstone of modern marketing and share tips for how you can strengthen your company's brand.

Experts quoted in this section:

Kelly Watkins | VP of Global Marketing, Slack

Dave Gerhardt | VP of Marketing, Drift

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Bill Macaitis | Advisor & Board Member

Ryan Carlson | CMO, Okta

How Every Marketing Touchpoint Affects Your Brand

What we're seeing is an evolution in how a brand shows up in the world to now include every touchpoint that somebody might have with a company. Everything from what it looks like to show up in a physical office space to interacting with sales or speaking with customer support.

Marketing can be a powerful instrument to help align people around the mission, vision and story and enable everyone to think about using those as a lens for doing work.

SOURCE: forbes.com/sites/billeehoward/2018/05/20/kelly-watkins-on-not-being-cursed-by-knowledge-the-craftsmanship-behind-great-marketing



KELLY WATKINS

VP of Global Marketing, Slack



Forget About Hacks, Algorithms, and Formulas: Focus on Building a Brand

Every company has a blog and a podcast. Every company is making videos. Every company is spending money on AdWords, Facebook ads, and retargeting. And on top of that, there are hundreds (if not thousands) of competitors in every industry leaving more options for your potential customers than ever before.

We live in a world of infinite supply. And in this world, traditional marketing and demand generation just aren't working like they used to. Yet most marketers continue to play by the same old rules and that's why they keep getting the same old results.

But that doesn't mean that marketing doesn't work anymore. In fact, marketing today can be even easier, because you don't have to learn all of the tricks, algorithms, and formulas: you have to focus on being you and building a brand.

SOURCE: drift.com/blog/brand-building

DAVE GERHARDT

VP of Marketing, Drift

Why a Strong Brand Will Always Lead to More Revenue

If you own a market with your brand, then the revenue will come. Because people want to buy from people they like. They don't want to buy because they got a discount. And they might initially buy for a discount, but they will always pay more if they like you. And if your brand can tell that story and a Google Ad [is] where [you] can get them in, you have to have both.

... in a world where a VP of sales or a customer service leader, the people who we target, are getting emails and direct mail all the time, you've got to think of something other than 'Call me so I can demo my software?' because the last thing you or I want to do is demo somebody's software.

SOURCE: elementthree.com/blog/bold-story-brand-guru-kyle-lacy-on-life-leadership-and-a-quirky-llama

KYLE LACY

VP of Marketing, Lessonly

Focusing on What Makes You Different (Not Better)

It doesn't matter whether your objective is to mold a professional-services business on your own or to build a small venture that employs others who believe in your mission. Designing a unique and distinct category niche is the biggest step that any entrepreneur — whether she is going it alone or leading others — can take towards successfully carving out territory in the minds of the audience she wants to attract.

It comes down to leveraging the exponential value of what makes you or your venture “different” rather than leaning on the incremental value of what makes you “better.”

Your No. 1 goal on the path to legendary is to achieve a unique position, one with which your brand can become synonymous.

Imagine being so respected in your field that other people who do similar things are compared to you, because you are the category queen — the leader in mindshare.

SOURCE: marketingjournal.org/be-different-not-better-christopher-lochhead-and-heather-clancy

CHRISTOPHER LOCHHEAD

Author & Podcast Host

The 4 P's of Successful Brand Building

After many years of helping startups define their brands, here's what I believe the four P's of successful brand building are:

1. Personality

The best brands are those that have truly defined their traits, because a brand's genetic makeup does a beautiful job relating to the values and culture of its intended audiences.

2. Purpose-Built

As marketers, we never want to be in a place where our solution is searching for a problem to solve. It makes messaging and positioning incredibly difficult, pushing you toward promoting features and functions rather than the brand's value.

3. Promise

As with any relationship, trust is crucial to maintaining a connection, especially when it comes to brands and their customers. As marketers, it's easy to solely focus on acquiring new customers, rather than building loyalty and revenues with your existing base.

4. Patience

Last, and certainly not least, is the ability to maintain perseverance for the process of branding. Building a brand is not just time consuming, but mind consuming. It likely takes a few iterations of the brand before it's really "right." And even then, "right" is a relative term.

SOURCE: forbes.com/sites/forbescommunicationscouncil/2017/06/28/successful-brand-building-marketings-four-ps-revisited



ASHLEY DEIBERT

CMO, Videolicious

The Importance of Authenticity

Being true to your values is critical, but you need to choose those values. At Slack, we wanted to be human, empathetic, courteous and even funny. These values worked because they reflected who we really were and we made sure to stay true to them. You have to act like that, you have to be like that. I want a brand that I can have a connection with, and that starts with authenticity.

SOURCE: similarweb.com/blog/bill-macaitis-marketing

A black and white portrait of Bill Macaitis, a man with short dark hair and a beard, smiling. He is wearing a dark button-down shirt. The background is a solid grey.

BILL MACAITIS

Advisor & Board Member

A black and white portrait of Ryan Carlson, a man with short dark hair, smiling. He is wearing a checkered shirt under a dark jacket. The background is a solid grey.

RYAN CARLSON

CMO, Okta

Why You Should Write a “Brand Bible”

We realized that as we had grown to over 800 people, if you asked 20 people around the company, “Tell me about Okta,” you would likely get 20 great but very different answers. We spent something like five or six months generating 700 pages of interview transcripts with employees, with customers, with partners, trying to understand that story. We then had to distill that down into something that everybody could speak to in the same way. It was really very helpful for us.

We created a 300-page book that describes the origins of the company, why the founders started it, how we talk about us, how we visually represent us, and how we think about customer success. We give one to every new employee. On their first day of work I tell them about the branding story, the process we went through. We think of it as a field manual for how to talk about our company, and we measure the success of it in how often we hear it back from new employees.

SOURCE: hottopics.ht/24670/okta-cmo-ryan-carlson-b2b-marketing-to-a-1-2bn-valuation-and-beyond



DEVELOP YOUR MARKETING STRATEGY

While your company's brand is the most important differentiator when it comes to beating out competitors and winning a customer's business, it's important to remember that there is no magic lever you can pull. Ultimately, building a brand and growing a business requires the careful planning and directing of a variety of marketing activities. That's why it's essential that you develop a cohesive marketing strategy that holds these activities together and focuses your team around completing common goals.

To quote author and leadership professor Lee Bolman: "A vision without a strategy remains an illusion."

In this section, our experts share their tips for developing a well-defined marketing strategy. From building ideal customer profiles, to finding the perfect co-marketing partners, to creating a demand generation portfolio, you'll learn how to craft a detailed plan that guides you toward measurable and predictable growth.

Experts quoted in this section:

Steli Efti | CEO, Close.io

Blake Harris | Head of Growth Marketing, Formlabs

Tomasz Tunguz | Venture Capitalist, Redpoint

Scott Brazina | CMO, Impact

Guillaume Cabane | VP of Growth, Drift

Heidi Bullock | CMO, Engagio

Ellie Mirman | CMO, Crayon

This Is Why You Should Never Sell to the Wrong Customers

Especially in the early days, turning away sales is difficult.

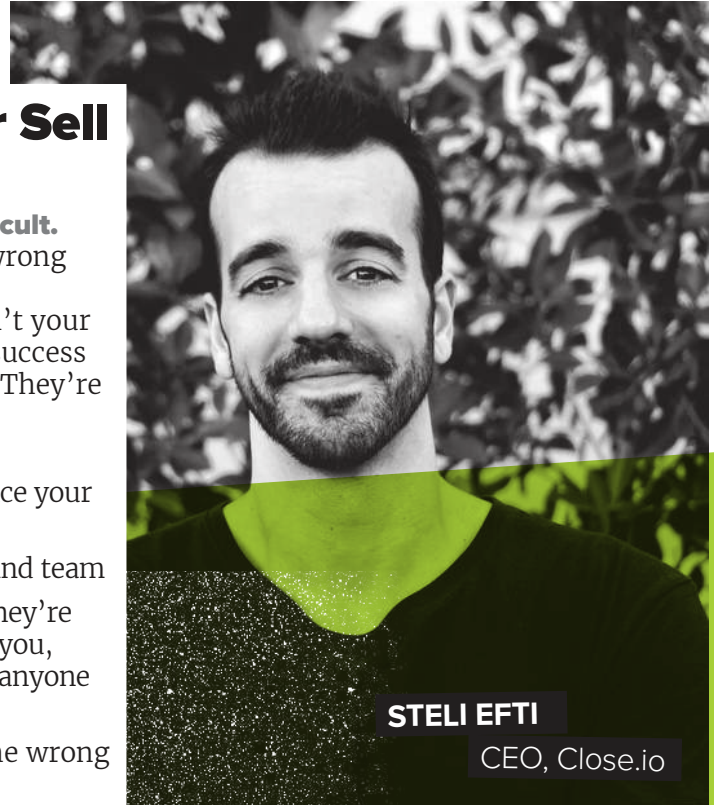
But no amount of cash can make up for selling to the wrong customers.

If you get someone to purchase your product who isn't your ideal customer—meaning they won't get value or see success from using it—they're going to destroy your business. They're going to:

- Create an insane amount of support needs and noise
- Bombard you with feature requests and try to influence your product roadmap in a direction you shouldn't take
- Complain and add a lot of negativity to your culture and team
- Inevitably, they're going to churn. And worst of all, they're not going to go quietly. They're going to tweet about you, write a blog post about their bad experience, and tell anyone who will listen how terrible your product is.

I feel like I need to say it again... Taking money from the wrong customer can kill your company and your brand.

SOURCE: blog.close.io/saas-startup-profile



STELI EFTI

CEO, Close.io

How to Find (and Win Over) the Perfect Marketing Partners

In any business relationship it's critical to be clear and consistent about your values and your vision, to know who you are and what you stand for, and to bring that "Big Idea" and conviction into the relationship.

In order to tell a bigger story that resonates, you need to treat the partnership like a sale, applying the same process you use to learn about your customers — their mindset, needs, goals, etc. You then need to find the points of alignment between those needs and the solution your partnership will provide.

Once you have their attention and sell them on the vision, it's time to provide prospective partners with more information to gain their trust.

In addition to sharing the front-facing story, it's important to address logistical and risk-mitigation concerns by sharing your company's back story, explaining in credible detail how you're building your business, and offering clear examples of how you add value. If you can tie all these pieces together, you can make a strong case for a partnership.

SOURCE: labs.openviewpartners.com/startup-biq-brand-partnership-socrata-velp



BLAKE HARRIS

Head of Growth

Marketing, Formlabs

Creating a Demand Generation Portfolio

After a startup establishes product market fit, scaling demand generation becomes the next major challenge. Doubling or tripling ARR each year for several consecutive years is not easy. The best marketers create a demand generation portfolio. There are four axes to measure this portfolio: scale of investment, sophistication, breadth and potential.

A demand generation portfolio might include search engine optimization, search engine marketing, social media marketing, influencer marketing, conferences/ events, referral marketing, branding, partnerships, reseller agreements, outbound sales development, channel activation, analyst relations, and so on.

How can one manage a broad and growing portfolio? By measuring them on those four axes.

1. **Sophistication**

How sophisticated is the organization in leveraging the channel? How much experimentation, insight, predictability has the team developed?

2. **Breadth**

How broad is the demand generation strategy? How many campaigns, how many creatives, how many partners, how many referrers?

3. **Potential**

How many customers and much revenue could this channel bring if successful?

4. **Scale of investment**

How large is the business' investment in the customer acquisition channel? What is the spend on the people, software and media?

SOURCE: tomtunguz.com/four-dimensions-of-demand-generation-portfolio/



The Importance of Marketing Partners

...when you look at the percent of revenue that comes from direct vs partners, based on data from the World Trade Organization (WTO) about all the revenue floating around the planet, it's really 75:25 from partners versus from direct. The vast majority of revenue comes from affiliates, influencers, brand-to-brand relationships.

Over the last 20–30 years, from a martech standpoint, the focus has been on optimization of the 25%. Starting with 10–15 years of CRM, then the recent 10 years of marketing automation. And now the third wave is that we're seeing a lot of companies saying, "okay, I've done a lot of optimization on that 25%. Now I need to do the 75%."

The 25% is easier. It's captive, it's in your control. It's your in-house team.

SOURCE: clickz.com/impact-mediarails-acquisition-grow-partner-marketing

SCOTT BRAZINA

CMO, Impact



Why Giving Away Porsches Isn't a Viable Growth Strategy

People who have huge budgets get great experiences.

And that's because sellers know that when you walk into that kind of shop, they predict that your fit is very high, and that you have the means, and so they are investing the time of those awesome salespeople — relationship managers — on you, because they know that about you.

And the problem is that in our world, or the internet world, we don't know anything, and so we're not investing anything. So the answer to marketing these past ten years hasn't been to improve the experience, it has been to decrease the cost — to massively decrease the cost so they can create yield.

But here's the thing: My job isn't to generate a ton of leads, it's not to generate a ton of sales whatever the cost. Because I can offer a Porsche to every person who comes to Drift — this is not happening, I'm not offering a Porsche — but say that I did. Of course people would convert and I'd have sales. But the yield would be negative. My job is to generate the max yield, in dollars, that's my job.

And the answer from people like me in these past years has been to decrease the cost to improve that yield. The problem is that decreasing the cost creates awful, sh*tty experiences. That's the problem.

SOURCE: drift.com/blog/future-of-sales-email

GUILLAUME CABANE

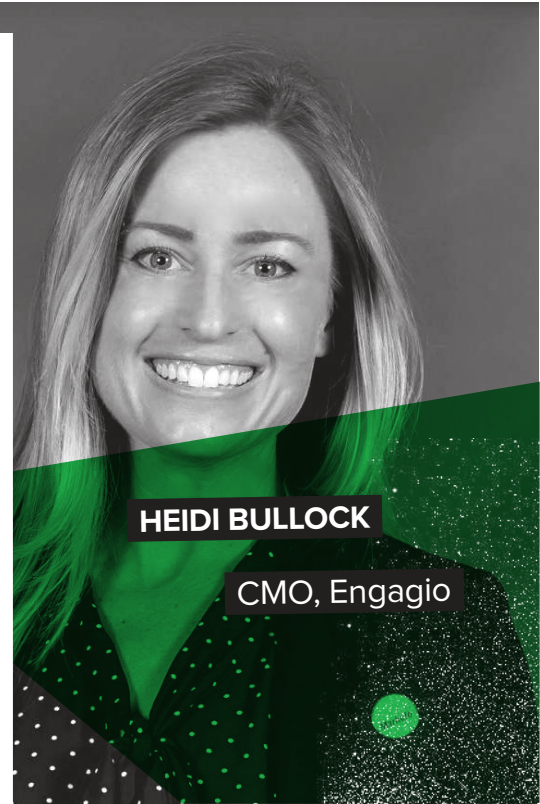
VP of Growth, Drift



Drive the right business impact with customer marketing

- 1. Set up a framework for your organization.** How are you organizing customer marketing? It shouldn't just be advocacy. For example, at many organizations advocacy exists but there is no dedicated marketing energy to adoption, retention, and expansion. Understand what moves the needle the MOST for your business and make sure there is focus on it. Advocacy is great, but not if adoption is broken.
- 2. Have clear goals for customer marketing.** For example, say your company is introducing a new product. As part of your Plan of Record (POR) there should be a cross-sell goal that that team is incentivized to hit (marketing and sales).
- 3. Segment and prioritize your customers – they are not all the same.** Marketers do a nice job with segmentation for acquisition, but this same discipline sometimes drops off with customers. Segment based on health, company size, role.

SOURCE: [linkedin.com/pulse/how-structure-your-marketing-organization-success-heidi-bullock](https://www.linkedin.com/pulse/how-structure-your-marketing-organization-success-heidi-bullock)



HEIDI BULLOCK

CMO, Engagio

The Biggest Mistake Marketing Teams Make When Launching New Programs

The biggest mistake I see is not thinking through the goals of the launch itself. Each type of program launch – from an ebook campaign to a customer advocacy program – can serve a variety of goals. Without articulating the aim of each program, you lose the needed direction for the campaign and won't know if the campaign was a success.

Each program rollout should include a planning phase where the goals, action items, and milestones, are set out at the start. Then, at the end of the campaign (or at least a pre-defined checkpoint), there should be a recap phase where the team reports on the results and does a retrospective on what worked and what didn't. This helps marketing teams be a lot more intentional about their efforts and make the best use of their most important resource: time.

SOURCE: contentmarketingworld.com/cmworld-interview-coloring-white-spaces-crayons-ellie-mirman



ELLIE MIRMAN

CMO, Crayon



GROW A MARKETING TEAM

For any team that's focused on long-term growth, having a well-defined marketing strategy is certainly important. However, what's even more important is having the right team in place to execute that strategy. To quote LinkedIn co-founder Reid Hoffman: "No matter how brilliant your mind or strategy, if you're playing a solo game, you'll always lose out to a team."

Remember: Marketing is a team sport, and everyone at your company who interacts with leads and customers plays a role. Members of the marketing team, however, are the standard-bearers of your brand. They set the tone for the rest of the company. As a result, hiring the right marketers, and creating a culture and environment in which the marketing team can flourish, are crucial.

In this section, our experts unveil the skills, qualities, and types of work experience hiring managers should look for in new marketing hires. They also explore the importance of shared team values and internal communication.

Experts quoted in this section:

Pat Grady | Partner, Sequoia

Mike Volpe | CEO, Lola.com

Tim Kopp | Partner, Hyde Park Venture Partners

Heather Zynczak | CMO, Pluralsight

Blair Shane | CMO, Sequoia

Shannon Stubo Brayton | CMO, LinkedIn



When It Comes to Hiring, Stick To First Principles

Stick to first principles, because if your employees actually care about your mission and if your customers are going to buy your products regardless of whether or not their budget is big or small, you're in a good spot.

We would actually encourage people in most cases to raise less money as opposed to more, to be very deliberate about the hiring and try to stay away from the people who respond to the line, 'We're a fast-growing company' and go after the people who respond to the line, 'We care about solving this problem. It's hard but we think it's worthwhile. If you agree, you should join us.'

SOURCE: drift.com/blog/lessons-from-pat-grady

The Two Must-Have Qualities of a Successful Marketing Team

First, when it comes to marketing, it's hard to have long-term plans, and it's difficult to map out all the moving parts ahead of time. It's important to stay responsive to what's going on in sales, the market, and the world as a whole for your strategies to succeed. For this reason, it's critical to stay agile.

Second, I don't favor the belief that smaller teams should be made up of one or two generalists, while bigger teams should be comprised of a lot of people who are specialists. Instead, I prefer to bring on folks with 't-shaped' skills – or personalities comfortable with becoming both generalists and specialist. If you comprise your team of folks who excel at something broad as well as have deeper knowledge in specific categories, then collaboration flows better, projects need fewer people involved, teams move more quickly, and you ultimately get better results. For example, if someone has expertise in blogging, I would like for that person to also know something about analytics, email, and social media. So, in the process of growing your team, try not to make the mistake of bringing on (only) specialists.

SOURCE: smallbiztrends.com/2018/09/cmo-to-ceo



Why Leadership, Problem-solving, and Communication Skills Are More Important Than Marketing Degrees

I don't know that hiring somebody out of school with a marketing degree is super helpful, to be honest, at least for the way I think about marketing.

I think they're still teaching a lot of the five P's. And it's not the professor's fault. How would you know any better unless you're doing the work?

But the thing is, [marketing] can be taught. I mean it really can be taught. And I think I've tried to prove that out in every role, but ExactTarget was really the case study.

On my team, there were teachers, people who were officers in the military, people who were creative, strategists, and stay-at-home moms coming back into the workforce. In some ways, it would seem like a ragtag bunch if you looked at the resumes. But I always say I recruited for leadership, problem-solving, and communication skills.

If you can find somebody who knows how to do all of those things, teaching marketing is not that hard. I mean it's really strategy. And if you can understand those things, I can teach you the softer pieces.

SOURCE: elementthree.com/blog/bold-story-interviews-vc-tim-kopp-leadership



TIM KOPP
Partner, Hyde Park Venture Partners

3 Secrets for Hiring a Talented Team

One thing that has become abundantly clear to me as I've worked my way up the corporate ladder is that hiring a talented team is the key to success as a senior executive. Some of the most successful CEOs I know would argue this is their BEST skill. If a founder or CEO has an amazing vision but can't hire a team to execute on that vision, he/she will fail.

If you aspire to the top executive ranks, or simply are looking for a promotion, it is critical to successfully put a talented team in place to support you. From my experience, here are a few suggestions for how to do that:

1. Hire team members with expertise you don't have. This will make your team stronger and your likelihood of success higher.
2. Hire people smarter than you. It will challenge your thinking in critical areas. You will make better decisions and more importantly, it will up every team member's game.
3. Hire a successor. Succession planning is important. Try to hire one person (but preferably more) who you can envision taking your role – and doing a better job at it – in the next few years. Without a successor, you are going to find it hard to be promoted and grow in your career.

Once you hire this amazing, talented team, empower them. Give them the resources and support they need and get out of their way.

SOURCE: [linkedin.com/pulse/its-all-team-hiring-right-talent-heather-zynczak](https://www.linkedin.com/pulse/its-all-team-hiring-right-talent-heather-zynczak)



The Importance of Openness and Appreciation

Openness to me means being curious and listening to different perspectives and ideas. It's about embracing not knowing, and seeking context whenever I join a meeting or a project to understand the different angles and inputs that can inform my decisions. I tend to be a pretty fast-paced thinker and decision maker, so I remind myself not to close out options too quickly.

Appreciation is about people and teams. I'm a big believer that you can't do everything on your own. Appreciating individuals sincerely and frequently has helped me grow really successful teams. Today, that might mean simply thanking a team member in detail for giving her all as she launches a new program. Or it could be thanking my husband tonight for taking our son to baseball so I could work late.

SOURCE: sequoiacap.com/newsletter/2018-10-10-blair-shane



BLAIR SHANE

CMO, Sequoia

Why You Should Pay Attention to Internal Communications Early in the Hiring Process

During the recruiting process, the internal comms team should already be involved in what that experience looks and feels like—everything from the emails you get from the hiring manager or the recruiter to what kind of paperwork you get before you come in. You want candidates to experience a consistent brand from the very beginning, whether you hire them or not.

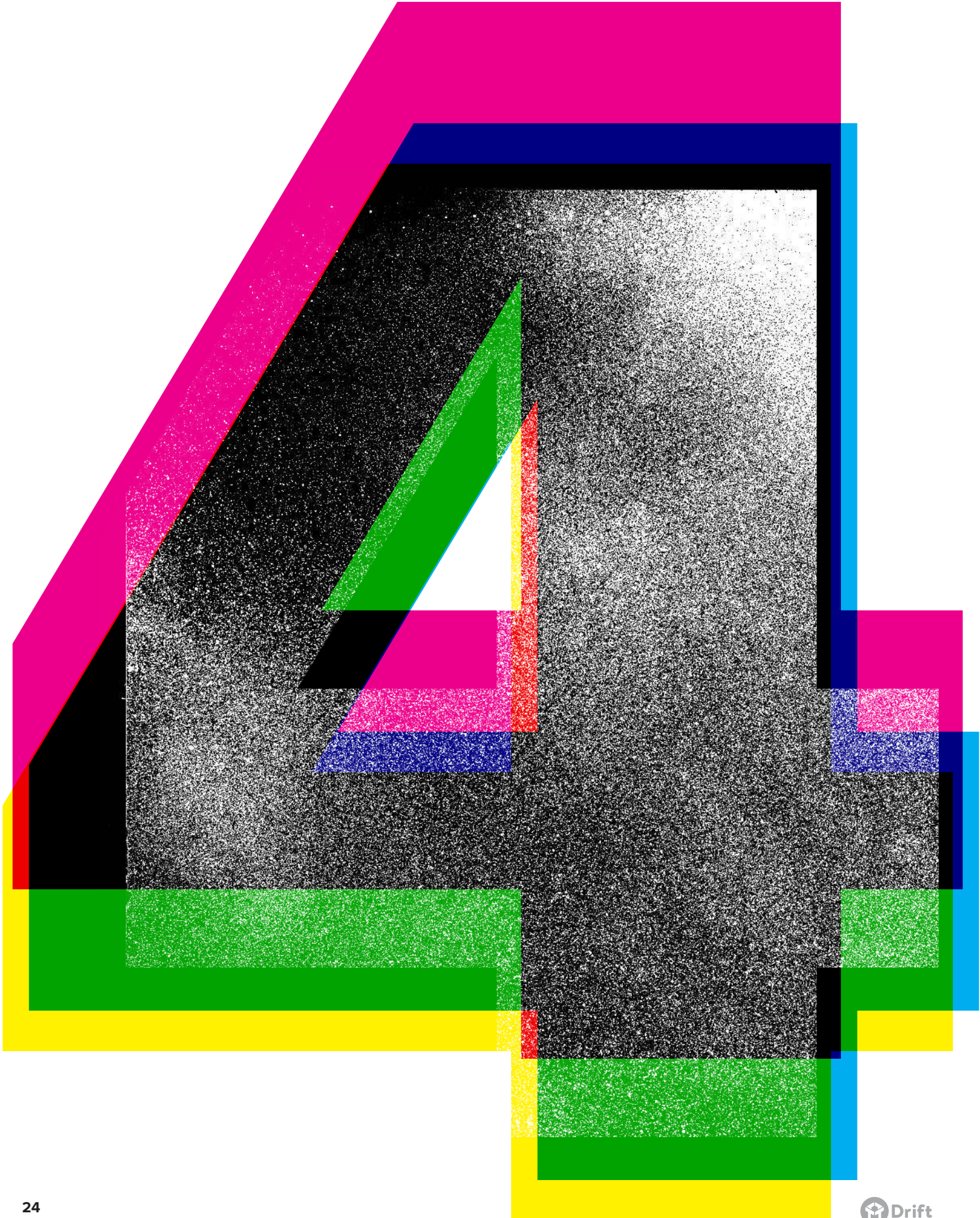
It's super important that employees have a great experience from week one and that includes everything, from making sure the laptop actually works to making sure they are invited to the right meetings. All the little things really do add up at this stage. Internal comms is playing a much bigger role in employee engagement and satisfaction than it ever has.

No offense to young male founders, but that special-touches thing is not something that is always their sweet spot. An experienced internal comms person will help make that a reality.

SOURCE: growth.eladgil.com/book/chapter-6-marketing-and-pr/building-a-marketing-and-communications-org-that-can-weather-the-storm-an-interview-with-shannon-stubo-brayton

SHANNON STUBO BRAYTON
CMO, LinkedIn





OPTIMIZE YOUR MARKETING CHANNELS

Once you have a marketing process up and running that's producing leads and creating real revenue opportunities for your sales team, you might be tempted to think that the marketing team's job is finished...

It's not.

The reality is that marketing's job is never done, because marketing teams should always be measuring, analyzing, improving upon their existing efforts. By failing to spend time on optimization, marketing teams are essentially leaving money on the table, and they're missing out on a huge opportunity to learn and improve. As advertising pioneer David Ogilvy once put it:

"Never stop testing, and your advertising will never stop improving."

That same principle holds true not just for advertising, but for all of your marketing channels. In this section, our experts share their optimization secrets and explore how, with a few tweaks, you can increase conversion rates and improve overall performance.

Experts quoted in this section:

Hiten Shah | Co-founder, FYI, Product Habits

Sara Strobe | Executive Director, Marketing, IBM

Ashley Minogue | Director of Growth, OpenView

Gar Smyth | Senior Director of Enterprise Marketing, Drift

Clair Byrd | Sr. Director, Enterprise Go-to-market & Customer Programs, Twilio

A Framework for Figuring Out What's Working (And What Isn't)

Break down all of your marketing channels, landing pages, and content along the following two dimensions: traffic and conversion rate. Then, categorize them all into one of four quadrants:

High traffic, high conversions: You're winning along both dimensions. Your only worry is losing it. So monitor both your traffic and conversion rate to make sure that it's not declining, and constantly run tests to see if you can optimize either dimension.

High traffic, low conversions: You have traffic exceeding 100,000 visitors, but you need to increase conversion. You have enough traffic to A/B test and execute on standard best practices to drive up your conversion rate.

Low traffic, high conversions: You're getting conversions, but not many of them. You need to increase your top-of-funnel to turn your high conversion rate into a significant number of new signups.

Low traffic, low conversions: You're struggling along both dimensions. Your path to success goes in order of first getting more traffic so that you can A/B test, and then increasing your conversion rate.

Fundamentally, this framework helps you break down your marketing problem so that you can employ one of the most basic rules of marketing:

Figure out what's working and then do more of it.

SOURCE: hitenism.com/focus-youre-overwhelmed-marketing-options



HITEN SHAH

Co-founder, FYI, Product Habits

3 Keys to Improving Performance

I've logged over 300 miles in running races over 8 years, and just in this past year started to see some small improvements in my 5ks and half marathons. Suddenly, I started asking, "How much faster could I run a half marathon? Could I translate these improvements to longer distances?"

According to Derek Bouchard-Hall, CEO of USA Cycling, 'At the elite level a 3% performance improvement in 12 months is attainable but very difficult. For the USA Women's Team Pursuit Team, they had only 11 months and needed 4.5% improvement which would require them to perform at a new world record time (4.12 / 15.4 Lap Average). The coach could account for the 3% in physiological improvement but needed technology to bring the other 1.5%. He focused in two area: Equipment (Bike/Tire, Wind Tunnel training) and Real-Time Analytic Training Insights.'

As you consider how to improve an area of your business, keep in mind these three things from the USA Cycling project with IBM Bluemix:

Set well-defined goals. Or, as business expert Stephen Covey would say, "always begin with the end in mind." USA cycling clearly articulated they needed to increase performance by 4.5%, and that would take more than a coach.

Choice and implementation of technology matters. Choose the tools that will not only deliver data and insights, but do so in a timely and relevant manner for your business.

Data alone doesn't equal guidance. You must review the data, and with your colleagues, your coach, your running buddy – set clear, executable actions.

SOURCE: ibm.com/blogs/bluemix/2016/11/conquering-impossible-goals-with-real-time-analytics



SARA STROPE

Executive Director, Marketing, IBM

Learning From High-Growth Companies

This past June we released the results of a survey of more than 500 marketing leaders covering marketing metrics, demand gen channel strategy and its effectiveness, tech stack, organizational structure and more. The respondents ranged from seed to growth stage executives, but the vast majority were expansion stage software leaders.

Taking a deeper look at our survey results, we uncovered key attributes shared by respondents from the fastest growing companies – among which revenue grew by more than 50% year over year.

So what exactly did we find? These companies were statistically significantly more likely to:

Leverage attribution to track marketing spend:

Attribution – identifying a marketing campaign's impact on customer acquisition – is the key to unlocking smart growth. The fastest growing companies are 30% more likely to leverage attribution models to understand the effectiveness of their spend.

Implement lead scoring based on two or more attributes:

Lead scoring is almost always born out of necessity. At the expansion stage, as companies shift from product development to customer development, they experience a surge of leads, but have limited resources to move these leads through the funnel.

Run continuous marketing experiments: The majority of the fastest growing companies we surveyed have run at least 3 marketing experiments in the past 3 months. The takeaway here isn't that 3 is the magic number (although some marketers may argue it is). The point is, the fastest growing companies adopt a 'test and learn culture'.

SOURCE: labs.openviewpartners.com/how-the-fastest-growing-saas-companies-approach-marketing



ASHLEY MINOGUE

Director of Growth, OpenView

The Limitations of Closed Advertising Ecosystems (Like Facebook)

The strategic and operational downside of closed ecosystems is that they increase costs and prevent brands from reaching consumers across channels. They leave marketers with a dangerous blind spot... Advertisers are unable to reconcile their own data across disparate ecosystems, nor to orchestrate integrated omnichannel customer experiences.

Closed ecosystems detrimentally blur the lines between players (media sellers) and referees (media performance and measurement technology companies). As a result, advertisers lose their ability to understand how their marketing is performing across all of these silos.

Marketers will continue to operate in a fragmented world of both open and closed ecosystems, with varying degrees of transparency and data access. To get by, they need buy-side tools that allow them to keep their sell-side partners honest, and to understand the value of each media channel in relation to others.

How valuable is a Facebook newsfeed ad versus an ad on the open ecosystem? How to decide on search investments versus the 30-second TV ad? How can marketers determine that the investment mix in their plan is driven by normalized outcomes across all their channels, and prove with certainty how their media investments are delivering returns for their business? Neutral third-party measurement tools are needed to help level the playing field.

SOURCE: mediapost.com/publications/article/277795/a-world-of-walled-gardens-the-demise-of-facebook



GAR SMYTH

Senior Director of
Enterprise Marketing, Drift

The Future of Content Marketing

I think content marketing isn't going to be whitepapers and blog posts for very much longer.

The way people are thinking about content is changing.

Businesses are starting to go beyond the current best practices and simply checking the boxes. More people are taking a design thinking approach; they have a problem that needs a solution, they find the ideal solution, and then they work back from there.

Marketers are starting to build content in much better ways for their end-users than they have in the past. The types of content, how they're distributed, is changing.

Also, I would love to see more and better video. That's a superpower if a brand can do video well. It is game changing for a business. It can be an expensive channel, but it can also be incredibly powerful.

SOURCE: native.ai/all-stars/2017/05/12/content-marketing-all-stars-qa-clair-byrd-of



CLAIR BYRD

Enterprise Go-to-market
& Customer Programs, Twilio



MODERNIZE YOUR VIDEO MARKETING

In a single day, SnapChat users watch a collective ten billion videos, while Facebook users watch a collective 100 million hours of video. By 2021, analytics predicts that video will be the source of 82% of all consumer traffic on the internet.

The takeaway: If your marketing team isn't investing in video and using it regularly to communicate and share ideas with prospective customers, you're missing out.

A decade ago, blogging was typically the most important source of content for marketing teams. But as consumer preferences have evolved, producing video content has become more and more essential. Many consumers now prefer video over other types of media, and one reason for this preference is video's authenticity. While other types of media are easy to automate, with video there's always a real person in front of the camera. There's no hiding. As a marketer, you have to be real.

These days, making and sharing videos isn't enough. To gain an advantage over your competitors, your videos need to stand out, and for best results, they need to be part of a broader video marketing strategy. In this section, our experts will share best practices for making this a reality.

Experts quoted in this section:

Harris Beber | CMO, Vimeo

Neil Patel | Co-founder, Neil Patel Digital

Andrew Capland | Director of Marketing, Wistia

Andy Raskin | Strategic Storyteller

Tyler Lessard | CMO, Vidyad

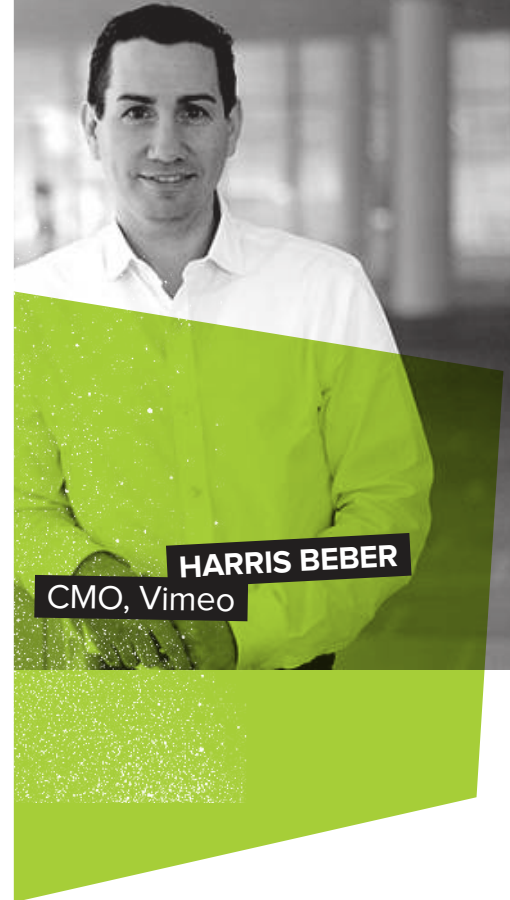
Using Data to Make Your Videos More Attention-Grabbing

We are in a constant battle for attention. In today's always-on world, the average human now loses focus within eight seconds (meaning we now have a shorter attention span than a goldfish). This translates to faster drop-off rates for videos. So, if you don't capture your audience's attention in that first few seconds, you've lost your chance with a potential customer. Higher engagement is also important for making sure your videos get seen in the first place since Facebook and other platforms use engagement to prioritize videos in their feed.

Knowing attention is limited and fleeting, how can you make sure that someone cares when they see your video? Do people on Twitter, Facebook, Instagram, Snapchat, LinkedIn, YouTube and your website all care about the same thing? You need to be thoughtful in your approach to each platform, using your eight seconds of attention wisely. That means not only being a more creative storyteller, but also surfacing the right part of the story that will matter most to your audience on each platform. And how do you know the right part of the story? Data, of course.

With analytics tools, you can look at the engagement of all the videos you published across multiple platforms, all in one place. This can help you understand where viewers are dropping off and how it differs for each platform. Knowing what viewers care about—and more importantly what they don't—will make sure that every resource you invest in video provides a return in the form of engaged viewers that care.

SOURCE: adweek.com/brand-marketing/3-ways-to-ensure-your-video-content-resonates-with-your-audience



HARRIS BEBER
CMO, Vimeo

The Art of Branding Your YouTube Channel

Branding is important no matter the marketing channel.

Many features for branding your YouTube channel are free and should be taken full advantage of. Customizing the background of your channel, showcasing your other social networks and creating a custom header are just a few of the many ways to brand your presence on YouTube.

Branding your channel helps bring a consistent experience to your viewers and subscribers on YouTube that they would see similarly reflected elsewhere. It's important to let each marketing channel have its own feel, but also be tied together with other channels as well. Highlighting your most important videos on your channel, alongside your other social networks is a helpful way to help flaunt your digital savvy and help make it as easy as possible for your online advocates to connect with you wherever they're active.

SOURCE: neilpatel.com/blog/youtube-channel-optimization



NEIL PATEL
Co-founder,
Neil Patel Digital

Measuring the ROI of Your Video Marketing Efforts

Metrics like impressions, play rate, and viewer engagement are table-stakes in most video platforms these days. And as such, they're typically the first stop on your list when it comes to analyzing the success of a video.

Hard and fast numbers are necessary for proving the ROI of your videos, however they don't tell the full story on their own. There are also qualitative benefits that contribute to long term ROI. It's important to consider both hard data and the following qualitative factors when deciding how successful a video is.

Brand influence: You can actually keep track of this one qualitatively to some degree—social media monitoring tools or even simply the comments on your blog can give you a better idea of how video is impacting your brand.

Product education: There are several ways to abstractly quantify improvement in customer understanding: metrics like volume of new customers that come from word-of-mouth, number of support requests per new customer, and ratings like Net Promoter score.

Trust in your business: We've said it before and we'll say it again—featuring friendly human faces and voices on camera creates trust within the viewer (it's science)... Don't lose out on the vital human connection that you can build by putting your employees on screen.

SOURCE: wistia.com/learn/marketing/understanding-video-roi



ANDREW CAPLAND

Director of Marketing, Wistia

The 3 Keys to Running Your Marketing Like a Reality TV Show

Drift follows an approach to marketing unlike any other company's, opening up a window—through a stream of videos, podcasts, and social posts—into the real lives of its employees, customers, and extended community members. Recently, I summed up Drift's approach in a tweet:

I mean this as the highest praise possible: @Drift isn't a vendor. It's a reality tv show.
—@araskin

But if you think that all you need to achieve Drift's success is to let the cameras roll and fill your social feeds with posts brimming with personal factoids, think again. Specifically, here are the 3 things Drift does incredibly well, and that every team should emulate:

Celebrate believers: After all, every reality show needs recurring characters with whom its viewers can form attachments.

Embrace the unmeasurable: Video is obviously the most powerful medium when it comes to building a reality show—that is, to celebrating believers—yet many leaders underestimate it due to membership in what I'll call the Cult of the Measurable.

Invite others to participate in the show: Videos like these are the lifeblood of Drift's reality show because they're spontaneous and unpolished, but more importantly because they let audiences participate. Participation can happen through likes and comments or when others are inspired to create reaction videos.

Ultimately, a reality show is a great metaphor for branding because both sell belonging.

SOURCE: medium.com/the-mission/the-real-housewives-of-tech-marketing-16cc34e6ea69



Narrowcasting: Using Targeted Content to Boost Engagement and Conversion

Today's marketer needs to be smarter to cut through the noise and to establish relevance and interest amongst real potential buyers. Entertaining or inspirational content can be a great way to get their attention, but it's time to move past the high-level brand video and get serious about targeting your message to distinct audience segments. It's called 'narrowcasting' your content, and it's the key to boosting audience engagement and conversion.

WHAT IS NARROWCASTING?

Narrowcasting is the practice of tailoring your marketing materials to specific buying personas. Narrowcasting helps your message to be clearly understood since you can speak in specific industry terminology and go into depth on use cases or details only your target would understand. In turn, narrowcasting helps pre-qualify leads. Anyone that doesn't find your content of value, or even doesn't understand what you're talking about, probably wasn't a good lead to send to sales anyway.

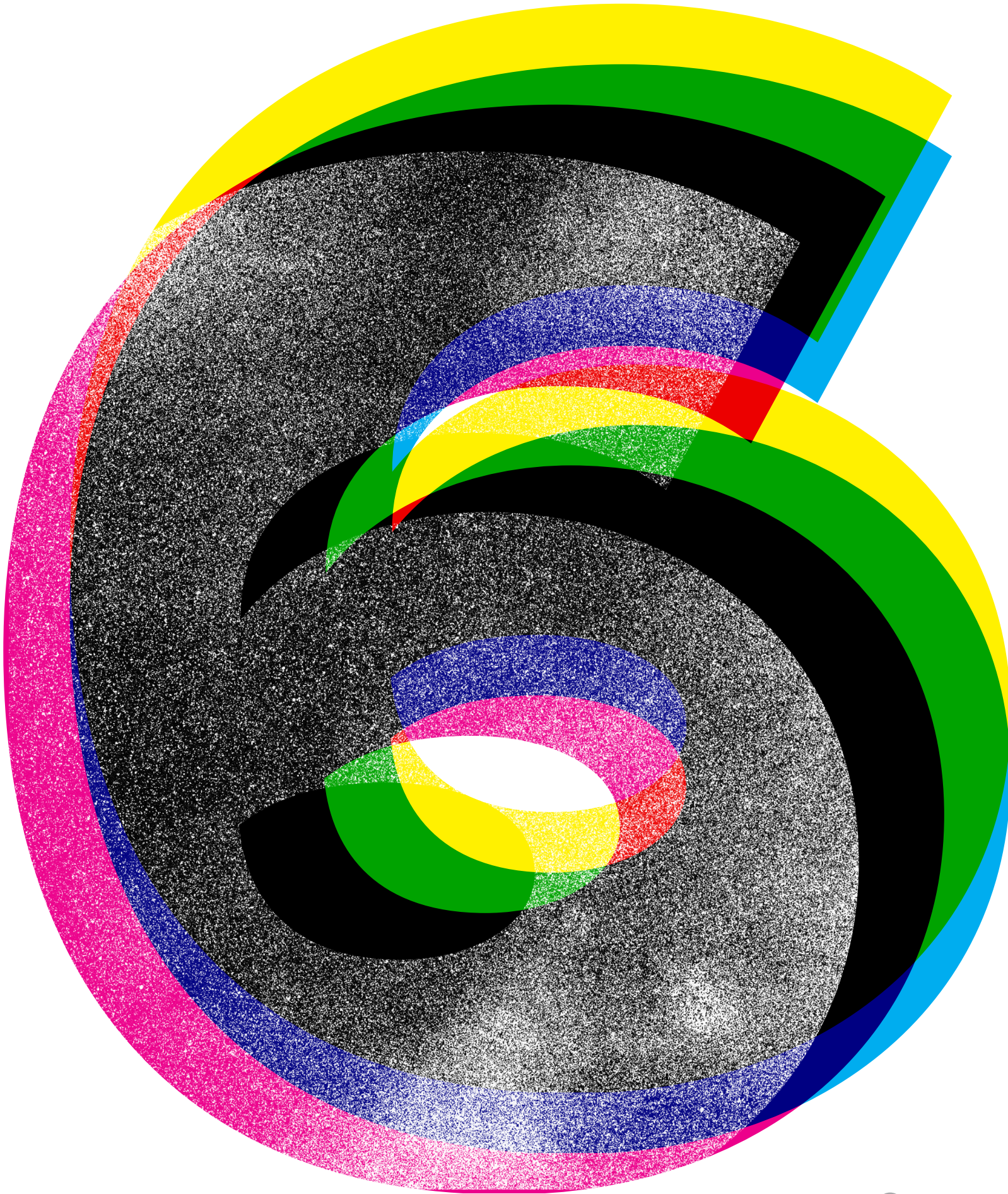
Throwing away the broadcast approach means designing content with your target audience top of mind. Get into their heads and get to know them like you know your best friend. This means more than just what industry they belong to or even what position they hold as the decision maker.

90% OF MARKETING RESPONDENTS PREFER VIDEO OVER ALL OTHER MEDIUMS

The more specific your video is, when speaking to a narrow niche, the better it will perform when it comes to conversion because it won't be burdened by unqualified viewers and it will excel in relevance with your intended buyers.

SOURCE: salesforce.com/blog/2015/03/narrowcasting-using-targeted-content-to-boost-engagement-and-conversion-gp





ADD CONVERSATIONAL MARKETING TO YOUR PLAYBOOK

For too many companies, their buying process has become cold, impersonal, and way more painful for the buyer than it needs to be. The fix? Make business actually feel personal again. And while modernizing your video marketing can help you do this, a more fundamental and widespread change is also needed. As marketers, we need to reimagine how businesses and customers communicate.

That's where conversational marketing comes into play. Instead of forcing people to fill out lead capture forms and wait days for a response, conversational marketing uses targeted messaging and intelligent chatbots to engage with leads in real-time.

The global research firm Gartner recently acknowledged that conversational marketing will be “a recognized channel of B2B and B2C customer engagement and revenue by 2020, displacing a combination of marketing, sales and service activities.” Meanwhile, the crowdsourced software review site G2 Crowd added conversational marketing as a category, noting that conversational marketing platforms “provide a higher standard of customer service at scale and simplify the overall buying process for potential customers around the world at any time of day.”

Experts quoted in this section:

Meagen Eisenberg | CMO, MongoDB

Sangram Vajre | CMO, Terminus

Tom Wentworth | CMO, RapidMiner

David Feng | Co-founder, Re:amaze

Eric Siu | CEO, Single Grain

Adam Schoenfeld | VP of Strategy, Drift

David Cancel | CEO, Drift

Today's Customers Expect Real-Time Experiences

The consumer is in control. They have connected devices, mobile technology in their hands at all times, they're throwing off a lot of data, they expect their experiences are going to be relevant and frictionless, and so forth. People aren't willing to wait even a second right now.

SOURCE: forbes.com/sites/katebrodock/2016/01/08/interview-meagen-eisenberg-mongodb

A black and white portrait of Meagen Eisenberg, a woman with blonde hair, smiling. The portrait is partially overlaid by a large yellow circle on the left side.

MEAGEN EISENBERG
CMO, MongoDB

Why Conversations Are More Important Than Lead Generation

...most B2B marketers measure success in terms of the number of leads generated. This gives them a false sense of accomplishment. Why? Because the number of leads has nothing to do with lead quality or pipeline velocity.

Sales people need to engage with qualified accounts and have meaningful conversations with buyers, prospects, and influencers. Marketing should be enabling and facilitating those conversations. In the end, salespeople don't close leads; they close accounts.

As a CMO, you are responsible for customer experience (end-to-end) and that extends well beyond the buyer's journey. That means you can't just focus on the product or your marketing collateral or whatever. You need to focus on the customer – What will get them interested? What will get them to buy? And, most of all, what will get them to stay with you?

SOURCE: aberdeens.com/cmo-essentials/we-dont-talk-about-leads-qa-with-sangram-vajre-of-terminus

A black and white portrait of Sangram Vajre, a man with dark hair, smiling. The portrait is partially overlaid by a large blue circle on the left side.

SANGRAM VAJRE
CMO, Terminus

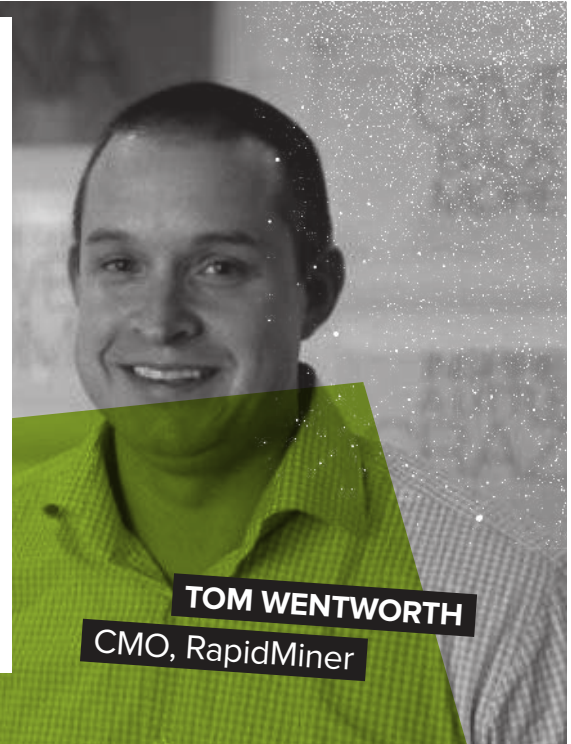
Getting Rid of Lead Capture Forms

If we build great products our objective should be to get users to use our great products and to then support them in that journey. And that is not a marketing journey that starts with a form on a website that leads to a content download that leads to a barrage of emails. As a marketer, my job isn't as much about marketing as it is about teaching and enabling.

If somebody comes to our site, and somebody's coming there with a question that we can answer, it's our duty, it's my duty as a brand-builder, to think about how I build this long-term relationship with them. Traditional marketing tactics encourage short-term thinking over long-term brand-building.

So my mandate to the team is: Treat every one of these conversations as if it's somebody who's going to spend a lot of money with us over their lifetime. And that's why the bot is so important to us, because it lets us touch everyone in a meaningful way, and then really focus where it makes the most sense.

SOURCE: drift.com/case_studies/rapidminer



Why Adding a Chatbot To Your Site Is a Natural Next Step

Because so many businesses now leverage the convenience and speed of on-site live chat to help customers, adding a chatbot to enhance that personalized experience is often a no-brainer.

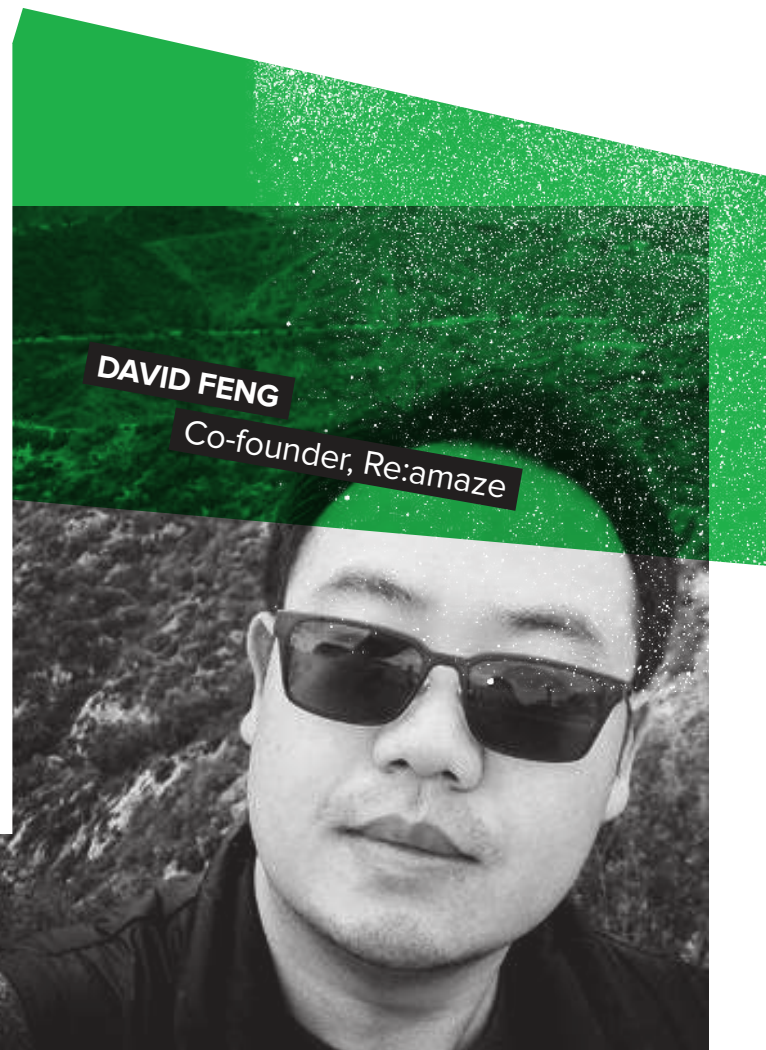
Website chatbots can carry out a lot of different functions:

- Greeting customers.
- Automatically suggesting FAQ articles.
- Booking appointments.
- Assisting in guiding customers to the next steps.

Giving customers a burdenless experience to start a conversation can help maximize your website visitors' potential value.

Imagine a 24/7 customer service agent that is ready to greet and answer basic questions, and it's highly scalable and an easy way to educate customers and foster new relationships through conversational marketing.

SOURCE: bigcommerce.com/blog/chatbots/#types-of-chatbots



Using Conversational Marketing to Drive Revenue

With the [conversational marketing] now, you have the ability to set appointments with people. You can have the bot. It becomes a bot. My bot, for example, might say, 'Hey! Are you spending money on paid advertising?' So Neil gave me that idea. They click yes, then it might say, 'How much are you spending in a month?' Then we give them like five bubbles and it talks about the budget. If their budget is less than let's say \$10,000 a month, it filters them over and it says okay, they're not a fit for single grain but it might push over to one of our referral partners. Then anybody that is qualified, the counter automatically shows up for the account executive. It shows the calendar, and you can book a meeting directly within there. That way, you basically have an inbound sales development representative for you, qualifying these leads for you. It starts to become a revenue generating kind of tool for you.

We have a little Drift button that asks them if they have any questions about the tool. Now, people started asking questions, and then I decided to hop in and start answering those questions. It took me probably 10-15 minutes each time. I think on the chats that I got on, maybe I got on like four chats, I think I converted 50%.



ERIC SIU

CEO, Single Grain

SOURCE: singlegrain.com/episodes/marketing-school/how-to-correctly-use-live-chat-on-your-website-ed-428/

The Real Reason Why Conversational Marketing Leads Have Higher Conversion Rates

The B2B marketing paradigm that we all grew up with was built for quantity, not quality and speed. It was built in a world where vendors have all the control, not buyers. The common B2B buying experience was defined by gates, forms and slow hand-offs between funnel stages. We already know that this approach leads to a slow (and crappy) experience for both buyers and sellers. And it only makes sense that marketing automation providers push this paradigm because they use the number of contacts in a customer's database as their economic engine.

But now, buyers are in control. They don't like to wait. The new paradigm, led by Conversational Marketing, is about engaging your best buyers, on their terms, with the best experience.

It's account-based, personalized around intent and engagement, contextual, human, and real-time. It's NOW. It gets the buyer to the next step in minutes rather than weeks. It allows your sales team to spend time with the best leads – the people who are a good fit and who want to talk. The result?

Speed: Faster time from engaged demand to customer

Focus: Getting your reps engaged with the buyers who are most likely to close

Experience: Creating a better experience for both buyer and rep



ADAM SCHOENFELD

VP of Strategy, Drift

SOURCE: drift.com/blog/why-conversational-marketing-leads-convert-higher/

Modern Marketing Is About Being in the NOW

Traditional B2B marketing and sales tools were built for a world that no longer exists. They were designed with companies in mind, not customers. The focus was on capturing as many leads as possible, not providing people with the best experience possible.

And we all know that time kills all deals. When you look at the old marketing and sales playbook, it's easy to see the fatal flaw: Waiting is baked into every step. As a buyer, you have to wait for a marketing team to qualify you before a sales rep will talk to you. And if it turns out you are qualified, you have to wait for that sales rep to email you or call you. And if the process keeps moving forward, you'll likely still need to set up a time a demo which means even more waiting.

That's a terrible experience to inflict on people — especially people who are coming to your website. People who are ready to buy NOW.

Back in 2016, we went all-in on the idea that just like with B2C buyers, B2B buyers would soon be expecting that “now” buying experience by default. After all, when you're selling to other businesses, you're really selling to the people at those businesses. And at Drift, we saw early on that those people were getting sick of filling out forms and waiting around for follow-ups.

So we decided to build something new. Something designed specifically with that “now” experience in mind. What we ended up with was not just a new product, but an entirely new methodology: Conversational marketing.

SOURCE: drift.com/blog/introducing-now



FINAL THOUGHTS

Thanks for reading!

We'd also like to thank all of our marketing experts featured in this book for sharing their wisdom. The goal of this book was to shine a light on some of the modern strategies and tactics that leading-edge marketing teams are using to drive growth and build lasting brands. We hope that this book succeeded in nudging you outside of your marketing comfort zone, and that you'll put some of the lessons you learned here into practice.

Want to stay up to date with the latest changes happening in sales & marketing? [Join 20k fellow marketers and salespeople and sign up for our newsletter.](#)