

## Messaging

### Step 1: Create a messaging timeline

See example templates in Trainer Connect. The timeline outlines when and by whom the messaging activities will be completed. It can vary depending on how the project was priced (which determines what is included in the project). Here is one example:

#### *Messaging Timeline:*

Action	Date	Weeks Before (-) or After (+) Event Date
Competitive Audit on Fusion IO, Micron, LSI	8/17/2011	-2.7
Virident Internal Exec Survey	8/18/2011	-2.5
Collect list of prospects or purchase prospect list for message validation	8/19/2011	-2.4
Draft Virident Messaging Framework	8/22/2011	-2
Present Internal Exec Survey findings	8/23/2011	-1.8
Customer messaging validation audits	8/24/2011	-1.7
Logo refresh steps	8/26/2011	-1.3
Review customer messaging audit with Virident	8/26/2011	-1.3
Issue prospect validation survey	8/29/2011	-1
Conduct analyst validation survey	8/29/2011	-1
Provide analysis on all validations points and messaging recommendations in Exec meeting	8/30/2011	-0.8
Finalize Virident Blueprint	9/1/2011	-0.5

### Step 2: Competitive Audit

The competitive audit compares each key competitor's marketing messages. Start by finding the template of a past audit. See templates for examples. Request from your client their top 3-4 competitors for the audit. Review Competitor Audit Key for a detailed explanation of each field in the competitor audit document. Remember this document is based on external marketing communications, thus you will defer to readily available documents/resources for your research on each competitor. Examples include: company website, press releases, press release boiler plates, marketing collateral, and if necessary, white papers that are available on the company website. Typically this is only necessary in the case of large multinational corporations like Oracle or EMC where the messaging for their divisions is not readily available.

A good rule of thumb is if you can't find the answer to a particular field, put NA (not available) and then move on. It would be a good best practice to record all the fields you are missing in a separate document for easy reference. If you can't find the asset you are looking for by the end of the review then your estimation of NA is correct. It helps to repeat the field I am looking for out loud while looking for it so you can stay focused on the asset while you survey the website looking for the correct information to insert in the field. Be sure to spell check and reformat your document to the same font and font size before you are done.

### **Step 3: Customize a pre-existing Internal Executive Survey**

The executive survey is Trainer's way of base-lining the executives' opinions on messaging as you start the process. It includes a series of questions that allow the executives to express their opinions about the current messaging, sales, and the future messaging. The process should include a minimum of the CEO, VP of Sales, and the VP of Marketing. See templates for examples. This will need to be customized particularly for the customer's industry and technology or service; thus the person who does the final edits needs to know the industry and client's business very well. The document is then sent to the client and distributed by Trainer's account lead to the top decision makers at the company. The point of the survey is to see if there is agreement on the main messages of the company and where the differences lie, the survey will also summarize the concerns that the executives have about the company's image or brand so they can be addressed in the new messaging.

After the surveys are finished, assign someone the task of reviewing the surveys and finding similarities and differences and recording them in a cumulative survey. This can be simplified by adding everyone's answers to one page and then seeing where the similarities are.

### **Step 4: Collect Prospect and Customer Lists for Messaging Validation**

Ask the client for a list of prospects and customers whom we can validate their new messaging with. We don't want all of the clients to be ecstatic customers as this can taint the results; we need a diverse

group to make the surveys accurate. If they don't have the resources or don't want to use their leads, purchase a list of prospects on Jigsaw.

### **Step 5: Draft Messaging Framework**

The messaging framework step is both an art and a science. It includes mention of the key industry pain point, the feature message, the associated advantages and business benefits. See past messaging drafts that culminate from the client messaging brainstorm meeting for examples. It is good to show clients past examples of other messaging frameworks so they know what the end product looks like. See messaging meeting presentations for an idea of how each messaging session/ brainstorm meeting with the client goes. These are typically led by the CEO or VP as it is a collaborative meeting and the person conducting the meeting has to corral lots of egos from the client to get them to agree on one FAB (feature/advantage/ benefit) document:

1. **Three Pain Points:** The meeting starts with a brainstorm of the top three unique pain points that the client's customers experience. Pain points are the things that cause our clients' customers to adopt the technology solution (to make the business pain go away). These points should be specific or the rest of the project will not work. It helps to tell the client this in advance so they have time to think about it and meet privately if necessary. The Executive Survey referenced above also asks for these pain points, so you should come prepared to the messaging session with the list of the top 4-6 pain points that were the most common responses from the executives. As a group, you will then narrow this list to three.
2. **Three Feature Messages:** This is easiest explained as the "bright shiny thing" that will be featured to solve the pain. It is not "how," it is the "what."
3. **Three Technical Advantages:** This is the "how" for the "what" that solves the pain point. Try and keep the technical messages at a very high level so even someone who is new to the subject can understand what you are talking about. This can be challenging; in the end the simpler the better. However, with that said, this is also the area to "show off" your client's unique technology, e.g. patents, "secret sauce," first-of-its-kind processes, etc.
4. **Three Business Benefits:** These are the benefits of the technical advantage, it's the "why" the result matters. If the pain point is cost, then how much money does this solution save the company or consumers? These points are directed at the C-Level executives; this is where business or money talks. Don't overcomplicate this one; focus on the word "benefit."
5. **Three Proof Points:** These are the points that confirm the message, the results that validate the message and make it legitimate. Are their patents? Is it the product award winning? Ask yourself what information can you also offer that would make you trust the statement more.

It is important to remember that we must as a group make decisions with the client about the top three feature, advantage and benefit; the client will want to extend on and on to four or five, but since people

only really remember three points in messaging we need to keep it tight and keep the client focused on what is most important. The first pain point is the pain point that is most important. It will be used as the top level messaging and is the focus of the company's elevator speech so we have to think in terms of "if I could only get one message across, what would it be?"

After brainstorming the FAB with the client, Trainer will need to go through the points and wordsmith them and make sure the best phrases are being used. Look at the competitive audit and see if any of the messages sound just like those of competitors. We want them to be unique, but within the same scope of their competitors i.e. speaking the same language respectively. Your goal is to find the white space for your new messaging that is not being used by others. Don't be afraid to add some Trainer magic if something is missing; for example, with one of our clients, we included a best practices methodology for the company so they can then say "they have 208 best practices" in providing their service, which differentiates them from competitors

The FAB is then sent back to the client for review. A meeting may be necessary to present the changes.

#### **Step 6: Customer Messaging Validation Audits**

See messaging validation questionnaire for an example of how to formulate the questions Trainer will ask customers in a 20-minute phone interview. You will want to interview at least 10 customers (to ensure that you have a wide-enough sample). After creating the questions, start making calls and setting up appointments with the customers for a time when they can speak again to validate the messaging. You will want to record the call so if they want to do it on the spot, try and defer or be ready to push record and put them on speaker phone. You will need some privacy when booking the calls and doing the interviews for this purpose. You will want to ask if it is ok to record the call, and if they have questions tell them their company and name will be kept private and all responses will be pooled together to maintain their privacy i.e. the recording is only for our internal purposes so we don't miss anything. We have done some of the interviews in person if they are local as this is a good way to build rapport with the client's customers. We have also offered lunch after the interview, and found that customers are more helpful in this case. We want the inside scoop of what would really make people/companies buy. What messages do they want to hear most if we are not saying it to them in our messaging questionnaire?

You need to ask prodding questions as they may rate something high on a scale of 1-4, but that is only because it is the best of those options. If they sound unenthused, then focus on the follow-up question about if there is anything we are missing and try and get to why those messages are off based on their response. With that said, pick your battles wisely. These are typically people with very busy days and you want to be as respectful of their time as possible. You have to judge their willingness to participate. Some people will be jaded and are going to throw the results off with their answers. After the call, get the mp3 transcribed. Give whoever is transcribing the interview the original questionnaire. If you are outsourcing the transcription, *be sure and leave all company names out of the request and record as this can be picked up by Google Alerts.*

If you promise results at the end of the survey, be sure and do your analysis of the total results and then follow up with the summary. After all the surveys are done, order gifts for the customers as a token of appreciation. We typically do something in the \$75-\$100 range per gift and shop at Tiffany's and Co., but make sure to establish a budget with your client first (and charge the gifts directly to their credit card).

### **Step 7: Review Customer Audit with Client**

After collecting and analyzing the results from all of the customers, present your findings and the transcriptions (from the customers who gave consent) to the client. This is typically done in conjunction with a presentation of any revision made to the FAB based on the findings. These findings are then incorporated into later presentations of the validation process.

### **Step 8: Prospect Validation Survey**

Like customer validation, prospect validation provides the client with a view on the messaging through the eyes of their buyers, which is often the most valuable view they will have. Trainer recommends that the client use both existing customers as well as messaging validation with prospects to ensure that the messaging will resonate with buyers not already connected with the company. In this case, these are people your client doesn't know, so you'll have to start by purchasing a list of buyers (you can order specific titles, companies in certain geographies, and companies in specific industries with list providers such as Jigsaw or Data.com). You'll then want to create a survey for these prospects (no more than 10 questions) that measures how the new messaging is resonating with the prospects. These questions are incredibly important, so ensure you validate the questions with your manager and the client to ensure you have asked the question appropriately. You'll also need to arrange for an incentive for prospects asked to take the survey to ensure you engage these prospects (we have used iPad drawings, Best Buy gift certificates, and Starbucks gift certificates). Use an online survey tool (such as Zoomerang) to query the prospect list and use that same tool to analyze results. These results will be factored into the messaging process once they are analyzed. This is arguably the most important input you will receive in the messaging process – as this gives a glimpse into how the market will respond to the messaging and the Company's brand.

### **Step 9: Analyst Validation Survey**

Industry analysts typically play a very important role in the way the market receives the Company and its brand. Once the messaging is "baked" with all the other input, run the messages by at least three industry analysts. You need relationships with the analysts in order to schedule this (you can't do ask them to give their time unless they trust you / feel as though there is a relationship with the client or with you that they want to pursue). The process is to question the analysts about whether the pain points are correctly identified, and about whether the feature message is compelling enough for audiences. The most important thing to check with the analysts is whether the message is differentiated from what's already being said in the market and if the message you are proposing matters to the market.

### **Step 10: Provide analysis on all validation points and messaging recommendations in Exec meeting**

This step involves a review of the FAB and the incorporation of any resounding trends that were voiced across the validation groups. If the addition of one point from one group (say Analysts for example) does not conflict with the needs of another group AND will enhance the information that everyone seems to be looking for in general, then you can customize it based on more specific insights. Be careful to add items which are not voiced from the “majority,” as it is impossible to satisfy everyone. Only in the cases where there is an ingenious idea do we recommend going against the majority.

After these additions and adjustments have been made to the FAB based on the audits, and the survey results have received multiple rounds of review and consensus has been formed on the revisions within Trainer, then the FAB is presented to the client.

### **Step 11: Finalize Messaging Blueprint**

See templates for examples that we then populate with material from the FAB. The Messaging Framework document is the most important of these templates as it takes the FAB and puts it into a story form, thus providing the framework for their new messaging. After filling out the Messaging Framework and other supporting documents, then meet with the client and confirm the results of the FAB are final. Make adjustments accordingly and incorporate those edits into the Messaging Framework.

The results and supporting documents of the messaging process can be printed and compiled into a messaging source guide. See examples of past binders presented to the client for example.