Coffeewriters: A guide to copywriting
by Jeff Williams

An approach

The "Think Different" story

In 1997, Apple had a miniscule market share and was teetering on the brink of irrelevancy.

Meanwhile, the Chiat/Day ad agency was soaring. They'd just won "agency of the year" honors and were landing major accounts, sometimes without having to pitch clients.

Steve Jobs, who'd returned to Apple the year before, got in touch with Lee Clow, the head of the Los Angeles office of TBWA\Chiat\Day.

Prior to its merger with TBWA, Chiat\Day, had worked with Apple and Jobs in the 80s. (They created the iconic "1984" commercial, directed by Ridley Scott). Clow very much wanted to win the Apple account back.

He figured Jobs would hand it to him.

Clow and copywriter Rob Siltanen flew up to Cupertino to meet with Jobs. On the flight, Clow told Siltanen that the agency was asked to pitch the job, they'd decline.

Jobs asked Clow to pitch the job.

Clow didn't decline. He changed his mind on the spot, and told Jobs he'd get back to him with a pitch.

Clow and Siltanen flew back to L.A., and sent the agency into overdrive trying to come up with a campaign that would help Apple get its mojo back.

The agency came up with the concept within a week: "Think Different," with visuals consisting of simple black-and-white photos of iconoclastic artists, explorers, inventors, and activists.

Clow and Siltanen returned to Apple to make the pitch.

They had no backup concepts.

When he heard the pitch, Jobs was excited. "This is great, this is really great," he said. "But I can't do this. People already think I'm an egotist."

Then he paused and said, “Screw it. It’s the right thing.”

The campaign got people thinking about the brand in a new way, set the media ablaze, and ignited Apple’s ascension.

Here’s the script of the TV commercial that launched the campaign. It tells a story.

> *Here’s to the crazy ones.*
> *The misfits. The rebels. The troublemakers.*
> *The round pegs in the square holes.*
> *The ones who see things differently.*
> *They’re not fond of rules. And they have no respect for the status quo.*
> *You can quote them, disagree with them, glorify or vilify them. About the only thing you can’t do is ignore them.*
> *Because they change things.*
> *They push the human race forward.*
> *While some may see them as the crazy ones, we see genius.*
> *Because the people who are crazy enough to think they can change the world, are the ones who do.*

The story is the universal story: A person battles obstacles to create change.

And inside that master story, TBWA\Chiat\Day nested stories that illustrated the theme in microcosm: the story of Nelson Mandela, Pablo Picasso, Amelia Earhart, and many more.

There’s a correlation between Apple’s success and the successful storytelling of the “Think Different” campaign. Maybe even causation.

Because good marketing IS good storytelling.

It’s the story of a business. The story of a product or service. The story about how someone’s life is made better by that business’s product or service. And the way all these stories interweave.

I’m sure a lot of this sounds familiar. These days, you can’t travel more than a few clicks online without stumbling across an article on how business needs to tell stories. This surge in storytelling enthusiasm, however, begs four questions:

1. Why do we need to tell stories?
2. What IS a story?
3. How do you tell one?
4. How do you put storytelling into practice in an organization?

I was curious. And although I've been a writer and editor for 20 years, I didn't feel like I had great answers to those questions.

So, about a year ago, I flew from Seattle down to Los Angeles to attend a storytelling seminar presented by the world's leading expert in story structure, Robert McKee.

By the end of the day, I had answers to the first three questions. Then I spent the subsequent year trying to answer the third one at Yesler.

Here's what I've learned.

Why do we need to tell stories?

Robert McKee is the author of the movie-industry bible "Story: Substance, Structure, Style, and the Principles of Screenwriting." He's also renowned for his 3-day screenwriting seminar, which he's been teaching for more than 30 years. At last check, alumni from the course had won more than 60 Oscars and 200 Emmys.

In recent years, in addition to leading his "Story" seminar, McKee has also run a business consultancy and taught a "storytelling in business" course called Storynomics.

Here's the core of McKee's Storynomics argument:

1. Old-school, interruption-based marketing methods don't work (no surprise there).
2. We skip ads, don't see them, or block them.
3. What does work is a compact, precise, and factual purpose-told story – that is, one told to get a prospect to act – because stories fit the way the brain works.

Story works better than mere appeals to emotion or facts because stories – which are both emotional and rational – reflect the way the mind operates.

Story encodes information with a positive or negative charge (pleasure or pain). They help us forecast outcomes based on previous experiences, letting us know "these berries are safe to eat" and "that large catlike creature with the big teeth is not safe to pet."

To explain how stories engage the brain, McKee pointed to the work of Princeton scientist Uri Hasson, who says:

> *Only when we use the full, engaging, coherent story do the responses [of listeners] spread deeper into the brain into higher-order areas, which include the frontal cortex and the parietal cortex, and make all of them respond very similarly. And we believe that these responses in higher-order areas are induced or become similar across listeners* ***because of the meaning conveyed by the speaker****, and not by words or sound.*

In other words, we are captivated by a story, to a much greater (and empirically verifiable) degree than we are by discrete packets of information, such as individual sounds or words — or arguments, features, and data. (Data is fine, but it has the most impact if you put it in the context of a story.)

Stories, as McKee says, are equipment for living.

What is a story?

For starters, here's what a is NOT: a chronology, hierarchy, list, process, journey, or narrative.

(A narrative is a sequence of things that happened: This happened then this happened then this happened. All stories are narratives; not all narratives are stories.)

A story, then, is

a series of dynamic events
that progress to bring about change
in a human life.

A good story will:

- Hook our attention.
- Hold our attention.
- Reward our attention.
- Move us to act.
- Deliver a change in value (typically from negative to positive).
- Appeal to our curiosity.

- Deliver surprise.
- Deliver insight.
- Move us emotionally via empathy — the recognition of a shared humanity revealed through struggle or adversity.

8 Parts to a purpose-told story

A purpose-told story (one a business tells to cause a reader or viewer to take an action) has 8 parts.

1. Ordinary world

This is where you determine the setting, protagonist, and core value binary.

The setting. Start with a world in balance. That world can be a physical setting, a social milieu, an abstraction, etc. When things change, think about how that value will be expressed. That's what will affect the audience.

The protagonist. It can be a prospect, customer, group of people, product, or a company. For a service company, the protagonist is usually a prospect. Whatever the protagonist is, it's never an overdog. No one can empathize with an overdog – we all see ourselves as underdogs.

To make your protagonist an underdog, put them up against a villain – an antagonistic force like: bureaucracy, social institutions, bureaucracy, internal fears and doubts; etc. These forces are what try to block the protagonist from getting what they want.

When we experience someone struggling against powerful forces to change for the better, we feel empathy. A person in empathy experiences story as if it's happening to them. The result? We create a human connection between the company or product and the audience. Always generate empathy.

The core value binary. It's a pair such as "efficiency / inefficiency"; "productivity / waste"; "simplicity/complexity"; "meaning / ennui."

What your protagonist wants is on the left side of the pair. The forces of antagonism serve the right side of the binary.

2. Inciting incident

Some event has knocked the prospect's world out of balance – to the negative.

3. Goal

The protagonist comes up with a plan to restore the balance by reaching some goal or achieving some object.

This is the thing that will put life back in balance. It has to have weight. It has to be important.

Martin Brody in "Jaws" wants a dead shark. Chiron in "Moonlight" wants love. Your prospect wants salespeople to close more deals.

When you think about the goal, ask yourself what happens if the protagonist doesn't get the object of desire?

What's at stake? It has to be a compelling answer.

4. The protagonist acts

The prospect does something to get the object based on their understanding of life.

They expect the world to react in a positive way.

It doesn't.

5. The world hits back

Everything worthwhile takes effort. And our first effort is never good enough.

When the world reacts differently than expected, there's a gap that opens up — between the expectation and the reality. The prospect's expectation is violated. (For example, in a case study, this is the answer to the question: "How did you first try to solve the problem?")

This event is the heart and soul of storytelling. If it doesn't happen, there's no story.

Story is created when the subjective world and objective world repeatedly collide. These collisions create turning points – places where things move from positive to negative, positive to double positive, negative to double negative, negative to positive, etc.

Turning points generate surprise, curiosity, and insights.

In other words, they keep the reader's attention.

One of the most important things McKee said in the seminar was that, "The power of story comes from the negative side of life." We have to establish the negative floor in a story, because it makes the protagonist's struggle to change generates empathy.

Again, empathy – where the reader or viewer recognizes that "This character is like me" – is critical to an effective story.

6. The protagonist takes a second action — from a place of insight

The prospect struggles through the gap between subjective and objective reality – a struggle through delusion and ignorance – to a second decision, made from a place of wisdom.

(In a screenplay, this step forms the bulk of the second act, where the protagonist struggles through a series of ever-greater obstacles before they get to step 7.)

7. The world reacts positively

The world responds and rewards the protagonist.

Anything you put in front of the audience at this point will be remembered. This "open mind" moment lasts 6-8 seconds. It's when you bring up the company logo or the call to action.

8. The protagonist achieves their goal

The world is back in balance. At least until the next inciting incident.

These are the basic elements.

Aside: While McKee's take on structure is more organic than that of other story experts like Syd Field, Blake Snyder, and Christopher Vogler (who bases his work on Joseph Campbell's Hero's Journey), his story form still slots pretty nicely into a three-act structure. Here's what I mean:

	Act I	Act II	Act III

Field	Setup	Conflict	Resolution
Blake Snyder (via Hegel)	Thesis	Antithesis	Synthesis
Vogler/Campbell	Departure	Initiation	Return
McKee	Ordinary world Inciting incident Goal Action	World reacts Second action (or ongoing action / reaction cycle)	World responds Goal achieved

The steps McKee outlines are powerful because they mirror our own individual struggles to change. Our first attempts are almost never enough and life usually has to kick our butts many times before we learn the lessons we need to learn to become our best selves.

Keep that in mind for your prospects on the buying journey. Their world has been knocked out of balance. Things aren't working the way they should. And what they've tried so far hasn't worked. There's a lot at stake. They have a goal. You can help them reach it.

Sometimes, we're telling stories explicitly (like in a case study or a brand video). Sometimes the telling is more implicit, as in an ad. But there's always a story playing out.

For example, here are the elements in the TBWA\Chiat\Day backstory:

1. Ordinary world	Apple's miniscule market share. Chiat\Day soaring.
2. Inciting Incident	Steve Jobs contacts Lee Clow.
3. Goal	Clow wants to win the Apple account.
4. First action	Clow tells Rob Siltanen he won't pitch.

5. World hits back	Jobs asked Clow to pitch.
6. Second action, from a place of insight	Chiat\Day prepares a pitch.
7. The world responds positively	Chiat\Day wins the account.
8. Goal achieved	"Think Different" confirms Chiat\Day as an industry leader and hands Apple a jet pack.

Here are the elements in the "Think Different" TV spot:

1. Ordinary world.	The imperfect world we all share.
2. Inciting Incident.	Implied: Some event has caused the "crazy one" to see a new possibility.
3. Goal.	They want to bring change only they can see.
4. First action.	They try to fit into existing social categories (round pegs in square holes).
5. World hits back.	It doesn't work. They're disagreed with or vilified.
6. Second action, from a place of insight.	They realize they have to make their own rules.
7. The world responds positively.	They are quoted and glorified. They change things.
8. Goal achieved.	They push the human race forward.

And here they are again, in the Mandela print ad, where they're almost all implicit:

1. Ordinary world.	Apartheid in South Africa.

2. Inciting Incident.	1960: South African police kill 69 protestors in the Sharpeville massacre.
3. Goal.	Overthrow the white supremacist government, with violence.
4. First action.	1961: Mandela forms the ANC's underground military wing, Umkhonto we Sizwe ("Spear of the Nation"), which launches a series of bombings.
5. World hits back.	1964: Mandela imprisoned "for life."
6. Second action, from a place of insight.	1985: Mandela, from prison, initiates peace talks with the South African government on his own.
7. The world responds positively.	1994: Mandela elected president of South Africa.
8. Goal achieved.	Foundation established for racial equality and reconciliation in South Africa.

(This is a deeply simplified synopsis of Mandela's life, but it gets to the story conveyed in a simple photograph of the man's face.)

How do you tell a story in business?

All that theory is a lot to process and takes time to internalize. (I've read McKee's "Story" twice and I'll probably read it a few more times before it sinks in.)

So, I lean on checklists and templates to help me create stories across the different kinds of B2B assets I need to write.

1. A list of questions

First, I start with a standard set of questions. Then, I use them to help me fill out a story template.

Here is my core set of questions:

1. Who is our audience?
2. What problem are we trying to solve for them?
3. How are they trying to solve it now?
4. What keeps them from solving it?
5. What's the risk if they don't solve it?
6. Why should they care about our solution?
7. What objections do they have to our client or solution?
8. What's the single most compelling message that must be communicated?
9. What makes the solution remarkable?
10. What do we want prospects to think, feel, and do?
11. What words do our prospects use to communicate the problem they have?

If I can get answers to those questions, I've got a great start on creating solid copy.

2. An outline

The second step is to fill out my story outline.

Here's how it might look in an imaginary case study for a company that creates project management software. In this case, their client is a solar energy company called Bright Futures.

1. Ordinary world.	Bright Futures installs solar arrays for commercial and government customers around the United States.
2. Inciting Incident.	The IT team discovers that it can't trust its data, which could lead to project delays and lost opportunities.
3. Goal.	The team wants better clean data, better insights, and more control.
4. First action.	Bright Futures tries a competing project management solution.
5. World hits back.	The team gets frustrated because the solution doesn't integrate with the company's CRM software.

6. Second action, from a place of insight.	The Bright Futures IT team implements our client's project management software.
7. The world responds positively.	Once IT knows it can trust its data, Bright Futures reduces project lead time across the company by more than 50%, saving half a million dollars per year.
8. Goal achieved.	No delays. No missed opportunities.

Voila, I've got a solid story framework in place.

3. P-A-S: An even simpler outline

McKee's 8-step template works especially well for long-form pieces like case studies, ebooks, blog posts, and white papers. But it's less applicable to short-form assets like display ads or sales emails.

When you have to write shorter copy, I've found it helpful to lean on the P-A-S structure. It's a classic copywriting formula and it stands for "problem, agitate, solve."

- Problem: You identify a problem your prospect has.
- Agitate: You detail the higher-order problems the first problem causes, or spotlight what's at stake if the problem isn't solved.
- Solve: You present your client's product or service as the solution.

Whenever I'm in doubt about where to start on a piece of copy, I first think "P-A-S."

It works because it's really McKee's structure in miniature:

	Act I	Act II	Act III
Field	Setup	Conflict	Resolution
Blake Snyder (via Hegel)	Thesis	Antithesis	Synthesis
Vogler/Campbell	Departure	Initiation	Return
McKee	Ordinary world Inciting incident Goal Action	World reacts Second action (or ongoing action / reaction cycle)	World responds Goal achieved
P-A-S formula	Problem The ordinary world (life before the problem) is implied. The inciting incident creates the problem. The goal is implicit – it's the solution to the problem. The action is whatever the prospect has tried that hasn't worked.	Agitate The agitation is what happens when the world hits back (maybe more than once.)	Solve The second, insightful action, is the solution (buy, download, learn more, etc.). The solution contains the promise of a positive response, the goal achieved, and the world brought back into balance.

Here’s how you might use the P-A-S structure in a social media ad with on-image text.

Intro copy (above the image):	Campus data is fragmented and under constant threat from ransomware. But it doesn’t need to be. See why.
On-image copy:	Universities are No. 1 (for ransomware attacks) Read the report
Asset title:	Put the Ransomware Business Out of Business
Link description:	[URL]

In this kind of ad, the last two categories (asset title and link description) are straightforward, so all of the story burden falls on the intro and on-image copy.

But – you can pack a lot of story energy into that small space!

The closer you are to the “awareness” end of the funnel, the more copy you’ll devote to the problem and the agitation. The closer you are to the “decision” end, the more copy you’ll devote to the solution.

The intro copy has the problem (fragmented data), agitation (ransomware threat), tease to the solution (“doesn’t have to be”), and CTA (see why) in just 18 words.

And the on-image copy, which a person would read first, gives you a hook into the material and repeats the CTA, in case the reader doesn’t read the intro copy. (Which is often the case. Sigh.)

While the asset title and link descriptions follow the format’s conventions, they also help fulfill the “solution” and “CTA” functions of the story structure.

Will the P-A-S formula always work?

Yes – but here’s the caveat: It depends on where your prospect is in their buyer journey.

The closer you are to the “awareness” end of the funnel, the more copy you’ll devote to the problem and the agitation. This is where you want to show your prospect that you understand them and speak their language.

The closer you are to the “decision” end of the funnel – a one-sheet for the sales team, say – the more copy you’ll devote to the solution.

How do you put storytelling into practice?

At the end of the seminar, McKee encouraged attendees to go forth and put storytelling into practice in our organizations.

Here are some of the steps I took at my old company, Yesler:

1. I created Coffeewriters, a publicly available website/blog. Coffeewriters contained: our approach to copywriting; marketing and advertising news, ideas, and best practices; templates for various assets; samples; and resources, like discovery questions, recommended reading; an idea bank; etc.
2. We met twice a month to talk shop. One meeting is to discuss a team member’s work. In the other, we bring in an internal guest speaker to broaden our marketing expertise.
3. We speak and teach on the subject.

Just getting in the habit of sharing our copy and talking about a storytelling approach has begun to give us a consistent style – a Yesler approach to copy that creates some distinction for us in the marketplace.

We’ve also seen the approach trickle up to leadership. When we revised our website copy last fall, we took a much more storified approach, and we’ve seen that when a story structure is applied to pitch presentations, it helps win us new business.

Best of all, the approach is inherently satisfying. Good stories are good business.

They humanize us, and they’re awfully fun to create. They are indeed equipment for living.

And for making meaning.

Content types and the buyer's journey

One of the key questions you need to answer when you're writing a piece of copy is:

How much does the prospect know about the product or service?

The answer determines their placement in the buyer's journey.

Buyer's-journey stages

1. Awareness: The prospect begins to understand they have a problem, but they don't know the severity of it.
2. Research: The prospect is investigating solutions.
3. Consideration: The prospect is investigating solutions that involve making a purchase. This stage is where the sales cycle begins.
4. Decision: The prospect is actively comparing different solutions available for purchase.

Goal for any piece of copy

Move the prospect to the next stage.

That's all you can do. Humans under normal circumstances aren't going to skip a step (from "I just met you" to "buy," for example, without a "let me learn more" in between).

For big purchases, you might modify the goal to: Keeping the buyer within the same stage. For example, a prospect could spend several months in the research phase.

How story structure applies

Every rule is there to be broken, but as outlined above, the problem-agitate-solve formula always affords you a sturdy copy scaffolding, because it encapsulates story structure in miniature.

To recap, it looks like this:

- Problem: You identify a problem your prospect has.
- Agitate: You detail the higher-order problems the first problem causes, or spotlight what's at stake if the problem isn't solved.

- Solve: You present your client’s product or service as the solution.

The asset type really doesn’t play a part in determining where the asset should fall in the funnel stage.

The way to use the formula with the prospect’s awareness level is to emphasize different components.

- Awareness stage: Emphasize the “problem” and “agitation.” Merely tease the “solution.”
- Research stage: The “problem” and “agitation” copy is balanced with the “solution” copy (benefits and features).
- Consideration stage: The “problem” and “agitation” copy is de-emphasized in favor of “solution” (benefits and features).
- Decision stage: The “problem” and “agitation” copy is drastically minimized or simply implied. The “solution” copy here speaks mostly to features, product specs, and “speeds and feeds.”

See below for guidance on specific copy types.

Just remember: The asset type doesn’t determine where it falls in the buyer journey.

Its content does.

"Awareness" content

Emphasize the “problem” and “agitation.” Merely tease the “solution.”

Asset types include:

- Ad / Paid Media (LinkedIn, Facebook)
- Ad / Display, Banner, Etc.
- Ad / SEM
- Blog post
- Blog Series for Executives
- Email — Invitation
- Email — Save the date
- Infographic
- Manifesto
- Print Postcard / Bill Insert / Invitation
- Radio Spot
- Video Script (Sizzle)

- Website
- White Paper

“Research" content

Here, the “problem” and “agitation” copy is balanced with the “solution” copy (benefits and features).

Asset types include:

- Ad / Paid Media (LinkedIn, Facebook)
- Ad / SEM
- Blog post
- Brochures
- Buyer’s Guide
- Case Study / General
- eBook
- Infographic
- Landing Page
- PowerPoint Deck
- Video Script (How-to)
- Website

“Consideration” content

The “problem” and “agitation” copy is de-emphasized in favor of “solution” (benefits and features).

Asset types include:

- Ad / Paid Media (LinkedIn, Facebook)
- ABM emails – approach and samples
- Ad / SEM
- Brochures
- Business Case
- Buyer’s Guide
- Case Study / General
- eBook
- Infographic
- Landing Page
- PowerPoint Deck

- Video Script (How-to)
- Website

“Decision” content

The “problem” and “agitation” copy is drastically minimized or simply implied. The “solution” copy here speaks mostly to features, product specs, and “speeds and feeds.”

Asset types include:

- Sales emails
- Brochures
- Infographic
- Sales sheets, leave-behinds, battle cards, call scripts.
- Website

Templates for drafting copy

Ad/Paid Media

REMEMBER

Check in with the strategists and/or paid media team to learn about nuances between different channels and how the audience is reading on those channels.

Work together with the designer, when possible, to concept and create together.

The “Problem/Agitate/Solve” formula (see below) is a great approach, since it’s a miniaturized version of the 3-act story structure (set-up, conflict, resolution).

Think mobile first. Short and sweet.

BEST PRACTICES

Your headlines are the most important part of your text ads. Everything else exists to complement them.

Descriptions following the headline must be relevant.

Your reader should be able to read the entire ad at a glance.

Include a strong CTA like “browse” or “order now.”

STRUCTURE/FORMULA

1. Problem. Capture the reader’s attention by identifying a problem they have.
2. Agitate. Now, make the problem worse to show the results of inaction.
3. Solve. Offer the solution.

EXAMPLE

Here’s how you might use the P-A-S structure in a social media ad with on-image text:

> Intro copy (above the image): Campus data is fragmented and under constant threat from ransomware. But it doesn’t need to be. See why.
>
> On-image copy: Universities are No. 1 (for ransomware attacks) / Read the report
>
> Asset title: Put the Ransomware Business Out of Business
>
> Link description: [URL]

Blog Post

REMINDERS

“Blog post” doesn’t really mean anything, since a blog post can be a:

- news article
- op-ed piece
- story
- listicle
- jazz riff
- graphic
- image
- etc.

That said, here are some general reminders that may be really obvious.

The problem-agitate-solve structure works great. If you’re telling the story of an individual, keep classic story structure in mind.

Why are you writing this thing? Start with the goal/CTA in mind and work your way toward it.

Make people care. Don’t lead with the client or their product (though they may want you to). You need to meet the reader out where they are. Help them.

STRUCTURE

Note: There is a lot of flexibility to the blog format. This is just one proven structure of many that will work.

1. HOOK

Capture the reader’s attention and get them to keep reading. For the headline, think about pulling a startling fact or insight from the blog, asking a question, or using “how to” language.

2. PROBLEM

Introduce the blog with a story, a stat, or a reference to a problem the prospect might be having.

To come up with an intro idea, just pay attention to what strikes you as you read the brief and source material. What phrases come up? What cultural references? Welcome them all in. You may be able to work with them. (See examples below.)

3. AGITATE

What’s at stake? What is the risk of NOT solving the problem you just introduced?

4. SOLVE

Let people know how you can help them solve their problem.

5. CALL TO ACTION

Tell people specifically what you want them to do. Like leave a comment.

Blog Series for Executives

REMINDERS

Humanize the executive. Quirks, foibles, and struggles will make the posts compelling.

Hold regular meetings (e.g.: a biweekly half-hour).

Agree on the goals for the blog series at the beginning of the project.

The executive will be busy, so here are a few thoughts on getting information efficiently:

- Make it easy for them to share their thoughts (e.g.: they could record an iPhone memo while they're out walking the dog and send it to you).
- Look for an avenue into their thinking. E.g.:; Attend a presentation they're giving; watch presentations they've recorded; read their white papers or slide decks; listen to interviews they've given; talk to their business manager.
- Make your regular meetings quite structured. Send questions or topics in advance. Record the call.

QUESTIONS

First-meeting questions:

- What mobile devices do you have?
- What are your favorite apps, cloud services and software tools?
- Describe your workspace. Why does it work for you?
- What's our best advice for managing everyday work and life?
- What is your preferred social network? How do you use it for business/work?
- Current number of unanswered emails in your inbox?
- Number of appointments/meetings on your calendar this week?
- How do you run meetings?
- Everyday work uniform?
- How do you make time for family?
- Best stress reliever? How do you unplug?
- What are you listening to?
- Daily reads? Favorite sites and newsletters?
- Book on your nightstand (or e-reader)?
- Night owl or early riser?
- Where do you get your best ideas?
- Whose work style would you want to learn more about or emulate?

Project-related questions:

- What are your goals with this series?
- Typical goals: Build personal brand; build department/company brand; develop thought-leadership (authority); advocate for progress in a particular area; build a following on Twitter and LinkedIn, and increase the number and quality of conversations happening there.

- Who’s your audience?
- What big problems are they trying to solve in their work lives?
- What blocks them?
- How can you help?
- What will make the program successful to you?
- If readers demonstrate their ability to identify and accept the topic at hand (sharing/comment in LinkedIn post). Readers feel a sense of optimism, desire, and/or motivation.
- What emotions do you want your readers to feel?
- Motivated? Inspired? Validated? Etc.
- How long will the posts be?
- 300-500 words is common.
- What is your voice?
- The goal is to write like you talk – that is, when your speaking is relaxed and confident.
- What do you want people to do after reading the posts?
- Soft CTAs include: asking the reader to consider the topic at hand and apply it to their life/professional setting.
- A “hard” CTA could be asking for comments or shares.
- What’s the overall message you’re trying to communicate?
- If you had to pick one, what would it be?

GENERATING BLOG TOPICS

Some common sources:

- The client’s bio (this is recommended as a series-starter).
- Look at what the client’s LinkedIn and Twitter connections are sharing and commenting on.
- Gather questions from the client’s employees or customers (FAQs are a rich source of material).
- Ideas, brainstorms, and semi-coherent noodlings from the client.
- How the client structures their day/runs meetings/sets goals/deals with failure.
- What they’re reading or listening to.
- Anecdotes from work/travel/conferences.
- Innovations or news from the business itself.

HOW WE WRITE

We’re specific. If we say the inside sales team “hires from a diverse set of experiences and backgrounds,” let's give an example. Tell one person’s story, and use it as a point of entry to the larger story. Or, cite a startling statistics (e.g.: “our team is 58% fine arts majors”).

If we say, “At Microsoft, there are hundreds of career opportunities, and you can truly build your own personalized journey,” let’s give specific examples of what that looks like. How do you build that journey? What are some of the options available?

We acknowledge emotions. Any copy we produce is going to be most effective if we can connect emotionally. What are your readers struggling with? What challenges has our client struggled with? How did they overcome them?

We tell stories. Storytelling in business is all the rage, but I just want to emphasize that: data and statistics have more impact when we can put them in the context of a story.

And it's okay to mention problems. We won't go overboard, but when you acknowledge a problem – even if it's as simple as "feeling stuck in your career?" – people feel empathy. And that empathetic connection, more than anything else, will give the post impact.

Keep a bit of struggle in there. It makes your copy relatable and authentic.

We believe in something. We all rally to a greater purpose. What is it for the client and the people they're writing for?

RECURRING MEETINGS

Regular meetings are critical to creating quality, authentic copy.

Have a master meeting document that lists your goals and audience for the program.

Meeting process:

- Record the call.
- Review any posts in progress.
- Confirm future post ideas.
- Interview the client for details about a coming post or posts. Look for an anecdote or story that gives the post life, and ask a reporter's questions: who, what when, where, why and how.

Brochure

REMEMBER

Note: The content below applies to a typical tri-fold brochure, but the principles are relevant to any brochure form factor.

Keep it short, punchy, and scannable. Short chunks of text, bullet lists, and clearly defined sections are good.

STRUCTURE

COVER

Pose an intriguing idea that positions the company, either internally or externally.

This could look like: "Business solutions that cut through the clutter;" "Your child's health is our priority;" or "Get better sleep—tonight."

INSIDE LEFT, CENTER, RIGHT

When you open the brochure, it'll need to communicate the value proposition, benefits, and features of the product or service — in conjunction with images, graphics, statistics, callouts, testimonials, etc.

OUTSIDE LEFT

Note: When you open the trifold brochure, this is the panel that appears opposite the inside front cover.

It's a good place for copy that can somewhat stand alone but provide emotional impact, such as a statistic, testimonial, or pullquote.

OUTSIDE CENTER

Call to action.

Other details you may include: contact information, social media names, a headline that positions your product or service, a tagline, etc.

Keep it simple, though.

Other thoughts …

Should pricing information be included in your brochure? The answer depends on many factors, the first of which is your brochure's purpose. If it's to generate leads, then it probably would be premature to include prices, rates, or fees. If it's to close sales, then providing prices may be essential to moving your sales process forward.

Give readers a reason to hang on to the brochure. Include something useful or interesting to them. For example, if your brochure focuses on home improvement services, perhaps print a ruler along one edge of the brochure.

Tips and tricks are good too. A short how-to guide, a recipe, steps for using a tool—anything that carries value beyond reading the brochure.

EXAMPLE

Purpose: Brochure (tri-fold — but on big paper): Describes problem; presents solutions in more detail. Adds more info about the business services. Will have text, visuals, and callouts.

1. FRONT

Business solutions that cut through the clutter

[Company's] B2B services

2. INSIDE LEFT

There's a lot we can do together.

Need to consolidate vendors? Move data to the cloud? Reach and reward customers? All of the above? [Company] can help.

Our business-to-business services have joined forces to deliver you greater value. We'll listen to your challenges, help you solve them, and suggest new ways for you to simplify, scale, and innovate.

Leading the way are our four core B2B services:

Service A
Service B
Service C
Service D
Service A

Send a clear signal to employees and customers how much you appreciate them. Our incentives program is simple, scalable, and effective. Plus, it makes people smile.

Improve employee satisfaction, increase retention rates and reduce recruitment costs by rewarding performance and service.

Build new business with incentives that drive new revenue, lower customer acquisition costs and increase brand loyalty.

Expand disbursement options by offering customers replacements for lost or stolen items at the speed of Amazon shipping.

3. INSIDE CENTER

Service B

Keep your business humming by helping your team scale, work faster, and lower IT costs. Service B helps you build and grow — all in one place.

Pay only for how much you consume. Gain higher economies of scale, which translates into lower pay as-you-go prices.

Stop guessing on infrastructure capacity needs. Access as much or as little capacity as you need, and can scale up or down with only a few minutes notice.

Decrease development time and increase agility. New IT resources are available to your developers in minutes, not weeks, saving you money and increasing innovation.

Service C

Cut through the clutter by advertising with [Company]. Connect your brand to Amazon customers wherever they are, across devices, whether or not they're on Amazon sites.

Reach shoppers who are ready to buy. Amazon can get your products noticed when customers are shopping for similar items.

Advertise on Amazon, even if your business isn't. Leverage our insights — based on more than 20 years of observing shoppers — to reach your ideal audience.

Measure and monitor performance. Understand how your ads are performing so you can make informed decisions, then fine-tune your ads to maximize sales and reach new customers.

4. INSIDE RIGHT

Service D

Streamline the flow of goods by working with a single supplier. Choosing how you receive deliveries and allowing your team to operate under a single [Company] account is fast, easy — and calm.

Receive exclusive discounts. Gain additional savings for multi-unit purchases. Plus, meet your sourcing requirements by comparing offers from multiple sellers on a single page.

Connect your team via a single [Company] account. Create approval workflows, manage your organization's buying, and track and monitor spending.

Choose the payment method that works best for your business, even if your organization is eligible for tax-exempt purchasing.

[Testimonials]

“We already knew it was going to be a beautiful story.”

— [Name], [Title]

“Our employees look forward to receiving the [Company] Gift Cards.”
— [Name], [Title]

“I think that the introduction of [Company] Gift Cards has convinced people to travel with JAL.”

— [Name], [Title]

5. OUTSIDE LEFT

Note: When you open the trifold brochure, this is the panel that appears opposite the inside front cover.

89%
89% percent of businesses expect to compete mainly on customer experience in the next few years.

64%
64% of business leaders say innovation and operational effectiveness are equally important to the success of their company.

45%
45% of CIOs say they are going all-in on digital by 2018
Find out how you can make your digital transformation simple and sustainable.

Contact us for a free consultation: [URL]

BACK COVER
[Logo]

Business Case

REMINDERS

This drafting template is derived from an actual asset that was intended to help mid-level professionals sell a technology solution to finance leaders or the leadership team. Adapt as you need.

It's okay to go long on the copy, IF it's clearly structured. The source asset came in at nearly 4,000 words.

SME interviews are particularly helpful. (Be sure to prod SMEs for anecdotes, which can add humanity and meaning to the final asset work.)

STRUCTURE

DEDICATION

This is optional, but provides a humanizing touch. For example:

"This guide is dedicated to AP professionals and anyone responsible for vendor invoice processing.

Especially those of you who've worn all the letters off your keyboard."

PART I

This part is where you tell readers, "I bet this feels familiar" and "I feel your pain."

1. INTRODUCTION/STORIES

Tell a brief story, or handful of anecdotes, to create empathy.

Here's an example of one for invoice automation:

She was wearing out keyboards.

The invoicing process had gotten so intense for one accountant at an insulation manufacturer that she was replacing her keyboard every six months.

She kept wearing the letters off.

After her company adopted an automated invoice solution, though, month-end close time went from five business days to two. Report time shrank to almost nothing. The company stopped having to order so many keyboards. And the accountant, as she put it, got to "actually be an accountant."

2. WHY WE WROTE THIS GUIDE

Talk about the purpose of the guide and what a reader should expect to be able to do after they read it.

3. CURRENT STATE

What is the current process like? What problems does it create?

4. OBSTACLES TO CHANGE

Talk about the things that keep companies from moving forward.

These can be budget, familiarity with current processes, IT concerns, fear of job loss, the existential fear of change, and so on.

PART II: HOW TO MAKE CHANGE HAPPEN

This part is about saying to readers, "Despite the obstacles, you can still change things for the better. Here's how."

5. FIND YOUR ALLIES AND KNOW YOUR AUDIENCE

Describe the people the reader will need to win over. Who are the internal constituents? What are they most concerned about? Who is the "No" person and how can they be turned into a "Yes"? (E.g.: Maybe it's the CIO who just needs to hear that she won't have to hire more IT staff.)

This is a good place to include persona information.

6. CREATE THE BUSINESS CASE DOCUMENT

This is where you tell your reader just what to include in the document they prepare.

Here's one way to do it.

First, gather internal data (this will help supplement any industry research).

Executive summary. Describe the problems you're addressing, the consequences of neglecting them, and why it's important to make a change now.For the rationale and supporting data, look at industry research and the internal data you've gathered.

The lay of the land. Define the root causes of all your company's potholes, which informs what resources the organization needs to invest in to fill them. Also identify any barriers that may cause delays, such as people, process, and technology. Be sure to show how they are impacting your business as well as describing what they are.

Cost-benefit analysis. It will be critical to your leadership audience that you accurately define and quantify the costs and benefits of the investment you're proposing.Here is some information you should gather: ROI data; case studies; your own company data.

The implantation plan.

Expected progress milestones.

7. HOW TO PRESENT YOUR BUSINESS CASE

Give tips and suggestions on how to make the pitch a success – whether it's a formal presentation or a more casual conversation (or series of them) with company leaders. Ideas include:

Present with confidence.

Suggested project roles and responsibilities.

Define success.

Practice.

Don't overload presentation slides with data or text.

8. CHEAT SHEET

Include answers to common questions and key statistics.

9. CONCLUSION

This is where you can include a blurb about the company and contact information.

Buyer's Guide

REMINDERS

The ideal buyer's guide provides the reader with a useful resource for evaluating the type of product we're promoting.

It's slanted in favor of our hero product, obviously, but it has to be authentic enough that it would be useful to somebody who didn't ultimately choose it.

To build trust with the reader, the guide has to be a bit brand-agnostic at the beginning, which is why it's good to actually spend some time asking the SME about the alternatives to using their product.

SOME INTERVIEW QUESTIONS

Think about someone making a purchase, what questions do they want answered.

5 KEY QUESTIONS

Interview objective

Get input from internal stakeholders on what key information should be included for the target audience.

Question 1: Considering a solution

What is the prospective buyer's state of mind when considering whether the client's kind of solution is right for them? What are the primary challenges they are having?

Question 2: Moving from the status quo

What alternatives is a prospective buyer using or considering prior to looking into a solution? What factors would the buyer prioritize most in deciding whether to make a change?

Question 3: Evaluating the right solution

What are the most important factors a prospective buyer should consider when evaluating solution providers in general? That is, what are the top 3 things that every solution needs to deliver?

Question 4: Onboarding requirements

What are the essential elements a prospective buyer should factor in with regards to onboarding requirements to implement a solution?

Question 5: Qualifying the hero product

How should a prospective buyer think about our client's product as the right product to meet their solution requirements? If there are 2 or 3 key takeaways the buyer should have after reading the guide, what are they?

STRUCTURE

THE ALTERNATIVES

For a buyer's guide, I'd probably be interested in learning about the alternatives to the hero product.

Not so much who their competition is, but what other broad approaches would a business use to manage, for example, invoicing and spending.

For instance:

Manual: No automation, ledgers are balanced and invoices are scanned by hand into the system, then reconciled with QuickBooks or something.

Hodgepodge: Invoicing and budgeting are handled by a mess of different software strung together with APIs

Partial integration: Accounting uses its own software that can connect and pull data from the organization's enterprise resource planning systems, etc.

Client's solution: – Fully automated, integrated system that is designed to work with everything seamlessly, etc.

THE TARGET

Who is it? Is the key target SMB, large scale, enterprise, or all of the above?

I imagine the buying process to be different for SMBs than for corporations.

THE BUYER

Who actually makes the purchasing decision?

Does it vary depending on the size of the company? Is it the CFO, or is it such a big decision that the CEO gets involved? In SMBs is it the head of accounting, who gets sign-off from the president?

PRICING

I'd caution against including specific pricing in a Buyer's Guide, which can quickly become inaccurate.

Buyer's guides are commonly used as a research tool that leads to a conversation with sales. I think maybe an alternative to listing prices would be a link in the guide to a pricing web page that clients can update.

EVALUATION PROCESS

A hallmark of buyer's guides is a section that explains how to go about evaluating your options and choosing the right solution. In many companies, this may require forming an evaluation team or task force from different disciplines that checks out different products and then makes a recommendation to the ultimate buyer.

The evaluation team members become advocates for the new product and can help in the sometimes disruptive transition process.

Who would be the ideal members of an evaluation team? Head of Accounting, a sales manager, an IT guy, and somebody from operations?

What kind of questions and information would each of these people need to make a decision? What criteria would they use to evaluate our client's solution vs. other solutions?

ONBOARDING ADVICE

What sort of feedback or advice would they have for an organization interested in adopting a particular product or service?

Is it a massive, disrupting change to the way a company does business that touches every department, or is the impact limited to say, the accounting team?

How can a company train and prepare its employees to make the switch?

What are 5 prerequisites a company must have in place before adopting the client's solution?

Case Studies

REMINDERS

Tell a story.

Be journalistic.

Focus on the strategy and goals of the subject (not on the product or its features). The customer is Batman. The business is Robin.

For a brief reminder on structure, see below. For deeper thoughts and examples, see Ramon's presentation: Case Studies and Storytelling.

See the internal resources for specifics on writing for Microsoft.

CASE-STUDY QUESTIONS

CUSTOMER QUESTIONNAIRE: INTRO
We are looking forward to understanding [COMPANY]s business challenges and how your innovative IT approach is producing positive business impact. Below are examples of questions that we might ask during your interview. However, we want the experience to be conversational, so we may explore other subjects as the conversation proceeds.

The purpose of the call is to discover how you're using [YESLER'S CLIENT – XXX] and its services (and other project-related software as necessary) to help your business. For example, our understanding is that [COMPANY NAME] can now [OPTIONAL DETAILS HERE]

SITUATION

Before you deployed [XXX]-based solution, what issues did you want to resolve?

What was the effect on [COMPANY NAME] as the result of these issues (for example, lost time, higher costs, lower IT productivity)?

Can you give us a specific example of teams or departments that were particularly affected by the challenges you describe?

Were there any other goals [of a cloud solution] that you hoped to achieve?

SOLUTION

Why did you choose [XXX] services (and any other [XXX] technologies)? For example, this might include the platform's capabilities, security, or interoperability with other technologies and devices—whatever applies to your situation.

Did you consider competing products or technologies, and if so, what made [XXX] technologies the superior choice?

How would you describe the performance of the [XXX] solution so far?

What is the general timeline of the project? What have you achieved so far and what are the next steps?

BENEFITS

Whenever possible, we like to attach metrics to key benefits because it gives the case study more credibility. This might include financial savings, percent savings, labor hours, and so on. If you have the numbers, we would appreciate them. If you don't have them, we can include placeholders in the review draft.

What are the most important benefits your company has gained by the adoption of [XXX] and other [XXX] products? The examples below might help you decide what benefits apply to you or what you'd like to tell us about.

Lower costs for you or your customers

Rapid return on investment

Scalability (that is, the ability to scale toward success)

Increased sales

New markets, revenue streams, or business opportunities

Streamlined business processes

Increased agility, faster time-to-market, or a competitive edge

Better customer service

Higher employee productivity

Time savings (for which tasks?)

Improved communication and collaboration?

Better access to information

Benefits for mobile/remote workers

Can you give us examples of something you're able to do now that you weren't before this project?

Can you comment on the value of the close partnership with [XXX] on this project?
Based on the success of this project, are there other related projects that you're planning for now?

Feel free to provide any additional benefits or comments that are not covered above.

Thank you for your time and help.

SUPPLEMENTAL QUESTIONS

Tell me about your role. What are your goals? What are you trying to accomplish?

Talk about your typical day. What's most challenging? (Ask the "dumb" questions. E.g.: If a subject says they "help clients gather process and workflows and think and prepare for their implementation," it feels a bit vague. I want to know more specifically what that looks or feels like or means.)

How does [product or service] apply tactically in the day to day? How did you first try to solve whatever problem you were having before you started using the product or service? (From a story-structure perspective, it's compelling when someone takes that first action and it doesn't work. It's like the universe wants them to take that "right action." Then when they do take that action and achieve an amazing solution, it has a really powerful impact.)

Thinking about your goals, why is what's important to you important to you?

Is there anything you're doing now that previously you didn't think was possible?

Have you been able to avoid a crisis because of [product or service]?

Specific results you've gained? E.g.: time or money savings?

STRUCTURE

1. Hook. Goal: Capture the reader's attention and get them to keep reading.
2. Ordinary world (setting, protagonists). The world is in balance.
3. Inciting incident. Something knocks the world out of balance.
4. Object of desire. The protagonist thinks of a solution to the imbalance.
5. Protagonist takes action. They take an action based on their idea.
6. World hits back. It's the wrong solution because it's not tempered by experience or informed by insight. The failure creates the low point of the story, which is critical for establishing empathy.
7. Protagonist takes right action (one informed by insight). Humbler and wiser now, the protagonist takes a second action.
8. World reacts positively. The prospect is rewarded.
9. Goal achieved. They get what they sought, and then some.

SAMPLE

Names have been changed from this case study.

Solar Company X Cuts Project Lead Time 50%, Gains Reliable Data

"You couldn't really trust the data."

Emily T. is talking about the problems her engineering team faced in trying to keep projects on track: slipped dates, inconsistent resourcing, and unreliable information. And all the problems all seemed to stem from unreliable project data.

Emily is the director of IT and infrastructure at [Solar Company X]. The company installs solar arrays for commercial and government customers around the United States. One project—a solar array atop a capped landfill—allowed one town to run on 100-percent renewable energy. Another will save a California college millions of dollars in coming years.

These projects, and hundreds like them, require the orchestration of federal organizations, regional utilities, local municipalities, and dozens of [Solar Company X] staff and contractors.

If [Solar Company X] couldn't trust its data — project information like deadlines, milestones, vendor schedules, and township meeting schedules — the result could be delays, cost, and lost opportunities for communities around the country.

One problem solved, another arises

At the heart of the company's development work lies its engineering team, which works with site surveyors, permitting agencies, and townships to prepare plots of land for solar installations.

Initially, the team members used [Brand B] to manage projects. And they were frustrated. "We found it really hard just trying to keep track of status and delays for all the projects," says Emily T.

Wanting better project insight and control, the engineering development manager looked for an accessible tool to help the team list tasks, track delays, and capture milestones for multiple projects simultaneously. After researching [CLIENT], he quickly entered all his projects into the tool.

He didn't know it at the time, but that decision would have a major impact on the company. "[CLIENT] use just grew organically from there," Emily T. says. "Our engineering team has embraced it fully." But efficiency gains were limited to the engineers.

That's because there was another problem.

Bad data could cause months of delays

While [Solar Company X] had relied on [CRM Provider] for more than a decade, and would continue to do so, they needed to get [CLIENT] and the CRM provider to work together.

The CRM provider held all the company's milestone dates for projects. "But we couldn't get down to the level of detail in the CRM provider that we needed," Emily T. says. "Our engineers used [CLIENT] to manage their day-to-day work and overall schedules. But they also had to put their data into the CRM provider for the rest of the company to see and use."

If they had time, that is.

More than once, [Solar Company X] leadership turned to reports that showed inaccurate dates. What was the risk? If [Solar Company X] missed a deadline to get on a town's planning board agenda, for example, the town committee might not meet again for three months. Questions and pushback could delay approval further. "We've definitely worked on projects where we've missed those dates and had to wait up to six more months," says Emily T.

So the team implemented [CLIENT'S SOLUTION], which automatically synchronizes data, regardless of where that data is entered.

Engineers make project updates once—and stakeholders can trust its accuracy.

Increased efficiency means more time to innovate

[Solar Company X] felt the effects immediately. "Once we set up a project, the connector pushes its dates and other data to CRM Provider and keeps them up to date, so our management and the rest of the company always know where a project is."

Now that the company's engineers only update [CLIENT'S SOLUTION] — without worrying about multiple entry — efficiency has skyrocketed. Plus, other departments now use Smartsheet earlier in their project management. And teams are communicating better.

In fact, [Solar Company X] has reduced project lead time across the company by more than 50% saving an estimated $250,000 a year. "Tasks that used to take 12 days now take only two to five days," Emily T. says.

Some of the changes are harder to quantify but just as meaningful. "People don't feel as overwhelmed and overworked," she says. "That definitely leaves room for more innovation and the ability to tackle projects that will help the department or overall company."

The snow is still going to fall. Town committees will take their sweet time. Delays will happen. But the company's team will be ready when they do.

They know they can trust their data.

IDEAS FOR REPURPOSING CASE STUDIES

1. A paid media campaign. Now that you've created some great case studies, we'd love to help promote this content (not just post it on the web site) and use it to generate sales leads. Our experience using LinkedIn Sponsored Content was so positive with another client – it offered a lot of flexibility to target different audiences (titles, industries, demographics, etc.). It seems like a $15,000 LinkedIn campaign over four weeks could be money well spent to help support the sales team.
2. Physical book: Turn the case studies into a physical book, which could be shared at the office, with clients, with new hires, etc. (I find myself asking "What would make these so compelling that people would read them even if they didn't have to?")
3. Physical leave-behinds or sales sheets.
4. Use to complement existing channels: internal/external newsletters, blog content, or social media.
5. Add to nurture or retention content.

6. Internal uses: Incorporate case studies into internal comms, HR, onboarding, customer-service materials, etc.
7. E-books: Use them as additions to longer thought-leadership/credibility ebooks designed for mid-funnel content.
8. Webinar, podcast, Slideshare …
9. Part of the media kit.
10. For customers on hold. What if prospects heard case studies read out loud (like an audiobook) instead of hold music?
11. Environmental signage. What about posters for display around the office? Could have a photo plus a brief summary of the story.

Email Invitation

REMEMBER

Keep it short. 100-150 words is a nice ballpark word count.

Keep the focus on the prospect and their problem first, the sender second.

STRUCTURE

1. FROM

Who's the mail coming from? It's better if it's a real person.

2. SUBJECT LINE

There are a lot of great subject line formulas (check out Copyhackers). E.g.:

- "Why you should … " or "How to … "
- ask a question that focuses on the prospect's pain, or
- write a really short subject line (it'll stand out in the inbox)

Just keep your prospect in mind and ask what would catch their attention.

3. PREVIEW TEXT

Think how the email will display on a mobile device, and make sure the subject line and preview complement each other.

4. BODY

Greeting: The prospect's name, or "Hi," or "Hello," etc.

Body copy: The problem-agitate-solve structure works well, with the "solve" being the event we're teasing.

CTA: "Register" or "sign up." It's also nice to add in some urgency, where relevant, e.g.: "space is limited."

Closing: Something friendly, like "See you there!" or "Thanks."

Signature: The person in the "from" line.

PS.: People love a good PS. It's a nice place to add some humor.

EXAMPLE

From

[Name]@[university].edu

Subject

Purchasing process feeling a little old-school?

Preview

We’re working with [client] to simplify purchasing.

Body copy

This example includes copy for a hero image as well as a headline.

Join us

ONE university. ONE procurement solution. ONE party.

Body

Need a simple solution to your supply needs?

Ready to be the hero of your department?

Want a free lunch?

Join us Thursday, August 24 from 11 to 2 to hear how [University Procurement] is working with [client] to bring you faster shipping, simple checkout, and an easy-to-use user experience.

CTA

Register now. The event is free, but space is limited.

See you there,

[NAME]

PS. We’ll have giveaways, music, and food. Lots of food.

Email -- Sales

REMEMBER

General email rules still apply, like:

- Keep it short: ~ 100 words.
- Keep the focus on the prospect and their problem first, the sender second.
- Keep it loose.
- Establish trust and authenticity.
- Send as plain text.

STRUCTURE

1. FROM

Make it a real person.

2. SUBJECT LINE

They are prime real estate to provide users context about your email contents. Guidelines:

- Use subject lines targeted to audience segments.
- Include the user's first name in the subject line.
- Be pithy.
- Use a targeted subject line intended for the audience.
- Use playful, relatable copy.
- Use a thought-provoking question instead of a specific statistic.
- Start with "Why you should …" or "How to …"; ask a question that focuses on the prospect's pain; write a really short subject line (it'll stand out in the inbox).
- Just keep your prospect in mind and ask what would catch their attention.
- Also: There are a lot of great subject line formulas.
- Just keep your prospect in mind and ask what would catch their attention.

3. PREVIEW TEXT

Think how the email will display on a mobile device, and make sure the subject line and preview complement each other.

4. BODY

The emphasis is on conversation over formula, so there's a lot of room with the body copy.

Just make it sound natural.

Greeting: The prospect's name, or "Hi," or "Hello," etc.

Body copy: The problem-agitate-solve structure is a nice default, but a sales email is going to be much more focused on the “solve” piece — more direct, more conversational.

CTA: Ask for the prospect to call or email.

Closing: Something friendly, e.g.: “Cheers” or “Thanks.”

Signature: The person in the “from” line.

PS.: It’s a nice place to add some humor.

EXAMPLES: COLD-INTRO EMAILS

EMAIL 1: FRIENDLY/APPROACHABLE

From

[NAME]@company.com

Subject

A. More Automation = Less Error
B. [first_name], You Can’t Control What You Can’t See
Preheader/Preview copy

A. And less error means more money
B. Start seeing your spend clearly

Body

Hi [first_name],

It’s [sales rep name] from [Company].

Got a cabinet full of paper invoices?

I’m asking because a lot of my clients used to. Either that or they had digitized their invoicing and called it good.

But they hadn’t automated invoicing. Once they did, it made their travel and expense management insanely simple and efficient.

If the paper-invoice problem sounds familiar, give me a call.

Here’s my number: [Rep’s phone number].

I guarantee I can simplify things for you.

[Rep’s name]

EMAIL 2: WITTY/CLEVER

From

[NAME]@company.com

Subject

A. See Spend Clearly Now
B. Does your company spend feel a bit opaque?

Preheader/Preview copy

A. We make spend visible
B. Concur can help you see clearly now

Body

Hi [first_name],

It’s [MDR name] from [company].

I’m a sales rep, but for a lot of clients I get to play optometrist. Which is cool.

Because businesses come to me and say, “I’ve got NO visibility into our spend.”

That’s when I put the soothing sounds of Johnny Nash on the hi-fi and I reply, “I will help you see clearly now.”

Then we talk about avoiding risk, managing budgets, seeing cash flow, and all our products that work together to make business simpler and more efficient.

So, if you feel you’ve got a touch of that spend astigmatism, give me a call at: [sales rep’s phone number].

Or reply to this e-mail.

It’s going to be a bright, bright, bright sunshiny day.

Cheers,

[Sales rep’s name]

EMAIL 3: INFORMATIVE

From

[NAME]@company.com

Subject

A. We Lose HOW Many Hours to Expense Reporting?
B. How to Save the Hundreds of Hours Lost on Expense Reports

Preheader/Preview copy

A. Hundreds – but here's how to fix that
B. Automate and you won't lose any time

Body

Hi [first_name],

It takes an employee about 20 minutes to fill out an expense report.

Add processing time, and the average report ends up costing you one employee hour.

Now, multiply that by the number of expense reports over the course of a year.

Suddenly you've lost hundreds of hours to expense reporting.

You should be losing zero.

Because the process can be completely automated. When it is, you can cut travel and expense costs by 40%.

Let's talk about how. Call me at: [sales rep's phone number].

Or reply to this e-mail.

Cheers,

[sales rep's name]

EXAMPLES: RE-ENGAGEMENT EMAILS

EMAIL 1: FRIENDLY/APPROACHABLE

From

[NAME]@company.com

Subject

A. Checking In
B. Time for a Quick Call?

Preheader/Preview copy

A. Automated yet?
B. I can make your spend management efficient

Body

Hi [first_name],

I know you must be incredibly busy, but I wanted to check back and see how your spend management process was treating you.

I can help you automate it.

What's your availability to connect in the next two weeks?

Cheers,

[Sales rep's name] [Sales rep's phone number]

EMAIL 2: INFORMATIVE

From

[NAME]@company.com

Subject

A. Hey again from [MDR name]
B. Pinging You Again

Preheader/Preview copy

A. How automation can save you beaucoup staff hours
B. About cutting T&E by 40%

Body

Hi [first_name],

I wrote a while back about how automating T&E could save you up to 40%.

Just checking back to see if you're up for a chat. If yes, call me at: [phone number].

Or reply to this e-mail.

If you're not the right person for this discussion, could you let me know who is?

Thanks for your time!

[Sales rep's name]

Email -- Save the Date

REMEMBER

Keep it short. 100-150 words is a nice ballpark word count.

Keep the focus on the audience first, the sender second.

STRUCTURE

1. FROM

Who's the mail coming from? It's better if it's a real person.

2. SUBJECT LINE

One typical formula for the subject is: [Save the date] + [value prop].

3. PREVIEW TEXT

Think how the email will display on a mobile device, and make sure the subject line and preview play off one another.

4. BODY

Greeting: The prospect's name, or "Hi," or "Hello," etc.

Body copy: The problem-agitate-solve structure works well, with the "solve" being the event we're teasing.

CTA: Save the date.

Closing: Something friendly, like "See you there!" or "Thanks."

Signature: The person in the "from" line.

PS.: People love a good PS. It's a nice place to add some humor.

EXAMPLE

From

[Name]@[university].edu

Subject

Save the date: We're simplifying procurement

Headline

This email had a designed header image. This was a draft headline and subhead.

Food! Fun! Procurement!

Join us to hear about single-supplier purchasing

Body

Hi. We've heard your department needs a better way to manage purchasing, ideally, by helping you find the right balance between efficiency and autonomy.

We have a solution for you.

Join us next month to hear about our partnership with [client] to help you better track suppliers, manage accounts, compare sellers, and simplify your work life.

Details: August 24 | 11 a.m. – 2 p.m. | McCaw Hall, Arrillaga Alumni Center | Music + food

Look for an invitation soon.

[NAME]

PS. The event is free, but space is limited

Infographics

REMINDERS

Infographics tell a story – with numbers and images. The numbers are the stars of the show, but you still need to put them in a story structure for the infographic to be effective. Otherwise it's just a bunch of stats.

Also remember: Prospects don't care about your client or how great they are or whatever X percent ROI they drove or empowered or generated. Prospects care about themselves. And they will only care about your client to the extent your client can help them solve their problems.

Prospects are Batman. Your client is the Michael Caine guy.

STRUCTURE

1. HOOK

The headline.

As always, think about your reader. What's in it for them? What problem do they have and how are you going to help them solve it?

Since this is an infographic, it's a good idea to tease with some numbers here.

2. PROBLEM

Subhead.

Describe a problem the reader has.

Or, describe a problem the client had, as long as it's also a problem the prospect likely has.

3. AGITATE/RISK

What's at stake?

When you can, it's always a great practice to mention what was at stake if the problem wasn't solved.

4. SOLUTION

This is the main body of the infographic, typically. All the great numbers that show how the problem was solved.

5. RESULTS

This is the big picture. What are the broader implications for the company or for customers now that this problem has been solved?

What good has been brought into the world? That's the point, right?

SAMPLE

[COMPANY] NURTURE'S BIG '17 AND WHAT IT MEANS FOR YOU

TL;DR

In December 2016, [Company] team rolled out a nurture program to provide pre-sales-pipeline leads with helpful information tailored to both their role in the organization and their product awareness.

The effort generated $XX million in opportunity pipeline influence for 2017.

That figure, however, only hints at the impact the program could have across the company. Here's how we built it, what we achieved, how we're making it better in 2018 and what it means for you.

HOW WE BUILT THE PROGRAM

1. We determined 8 relevant buyer profiles.

CEO, CMO, CIO, CTO, CSO, enterprise app dev, VP infrastructure, VP data and analytics

2. We identified 3 relevant customer stages.

Awareness. Research. Consideration.

Prospects can be "leapfrogged" to the most relevant stage based on familiarity with a product, role, etc.

3. We designed 7 nurture tracks.

6 profile-based tracks (9 emails per track)

1 “discovery” track (3 emails for this track)

4. We wrote custom content for each email and localized it into 6 languages.

130 unique assets

984 emails

RESULTS

- $XXM opportunity pipeline Influence (through Q3)
- $XXM pipeline won (through Q3)
- 523K total leads
- 7K new leads per week
- +28% open rate (compared to industry benchmark)
- +1.85% click rate (compared to industry benchmark)
- 400+ opportunities (through Q3)
- 78.5% click rate for best-performing asset

It’s a good start. But 2017 was really just about building the foundation. 2018 is about going big.

WHAT’S NEXT

Here’s what we’ll focus on this year:

- Onboarding. Make it logical and exciting.
- Alignment. Coordinate with existing and new programs.
- Sales engagement. Use predictive content to make assets more relevant; move the best prospects to the team with sales acceleration.
- Customized content. Pilot real-time personalization of content in enterprise accounts.
- Dynamic CTAs. Drive more specific calls-to-action to accelerate sales engagement.

BUILD YOUR PROGRAM

Have leads you want to nurture?

Email me. I’d love to share what we’ve learned: [email]

Postcard

BEST PRACTICES

Short and sweet. Be easy on the eyes.
Include one important CTA only. Think: “register now”; “visit our website”; “call us today.”

Don’t try to sell anything—the purpose of a postcard is to get attention.

Include an offer or valuable information. This could be a coupon, notification for an event gift bag, or a recipe.

There are two sides to every postcard, so make the most of them both.

The non-address side should have the biggest, boldest photos and colors. Think of it as a poster. The other side should carry your offer, contact information and other details.

Don’t forget to leave room for postage.

Remember your problem/agitate/solve structure.

Radio Spot

REMINDERS

Think about:

What information you have to include. Write that first, then build the rest of the ad.
How you'll use sound effects.
How you can create a picture for your prospect
Style and tone. Will there be a single announcer? Will it be a conversation? Can you use humor? Silence?
15 seconds is 30-40 words; 30 seconds is ~80 words; 60 seconds is ~160 words.

STRUCTURE

The Problem-Agitate-Solve formula (which is itself a mini-version of the 3-act story structure) is a good starting place — especially for a narrated spot. If you're writing a humorous piece, the PAS structure is a good reminder of the elements you'll want to include. And if you're writing a spot with a more dramatic angle, see the McKee post for a fuller treatment of story structure.

1. PROBLEM

Hook the prospect with one sentence that describes a common problem.

2. AGITATE

"And [the problem] is even worse than you think because X, Y, and Z."
This gets at the risk of what's at stake if the problem isn't solved.

3. SOLVE

The solution is the product or service. It sounds something like: "Well, [my product or service] can help." Then you describe the benefits.

4. CALL TO ACTION

Tell people specifically what you want them to do next.

RESOURCES

[7 Easy steps to writing a 30-second radio ad]

Landing Page

REMEMBER

Note: The content below is generally applicable to an asset's landing page, splash page, or long-form sales page.

First, ask:

- What is our visitor thinking when she lands on this page?
- What do we want her to do by the time she finishes with the page?
- How does her thinking need to change in the space between the start and the end of the page? And what do we need to show her and tell her to move her from where she was pre-page to where we want her to be now? (The answers will dictate what goes on the page and how long it needs to be.)
- Where is she going after this?

A good way to think about the general layout of the page is the 10/90 Messaging Rule of Layout.

Top 10 percent of the page is about matching 1) the visitor's stage of awareness and 2) the message(s) that led her here.

The bottom 90 percent is all about convincing her.

To convincer her, imagine answering these questions in conversation with your visitor:

- What do you do?
- Okay. Why should I care?
- Am I alone in caring – or do others (preferably others like me) care?
- You're starting to win me over. But I'm skeptical. So show me: how do you do what you say you do?
- And if I believe you and your process/solution, how will my life improve?
- I'd like to believe you, but first tell me: why is it safe for me to believe you?*
- Okay, let's say I believe you. Now what?
- These questions aren't perfect and your answers to them may vary – or won't exist at all – and that's okay. Use them as a starting point for a very simple conversation.

STRUCTURE

HEADLINE

Address the reader’s problem in their words, e.g.: with a question or a statement of the value proposition. “Want your online meetings to not suck?”; “Get your remote teams to work together better”; etc.

SUBHEAD

Elaborate on the solution.

CTV BUTTON OR EXPLAINER VIDEO

The video typically goes here. Video-button language can say something like: “Take 60 seconds to see how we make meetings better.”

A “call to value” button is more aspirational than the usual CTA button, and is best for people before they’ve decided to buy. Button copy could be something like, “Save money. Live more.”

SOCIAL PROOF

Add the logo row and/or testimonials.

BENEFITS + FEATURES

Describe how the product or service makes life better and the features that make it possible.

SOCIAL PROOF

The bottom of the page is a great place to add links to case studies or how-to videos.

CALL TO ACTION

“Order Now”; “Get the Guide”; “Buy Now”; etc.

SEM copy

REMEMBER

SEM is about brute clarity and keywords. All cleverness will be ruthlessly rooted out and expunged.

Be direct, simple, and offer a strong call to action.

Get as close as possible the character limits – the larger the ad, the higher the click-through rate.

STRUCTURE/FORMULA

HEADLINE 1 (30 CHARACTERS MAX)

The strategist will customize this to the individual keyword. No need for copywriters to touch this.

HEADLINE 2 (30 CHARACTERS MAX)

This isn't a lot of room. Think about what problem you're solving. Include a keyword.

DESCRIPTION (80 CHARACTERS MAX)

Expand on the problem (i.e., agitate it), tease the solution, and offer a CTA.

EXAMPLES

Here are a handful of the hundred or so options we tried to promote Yesler's guide: "How to Choose a B2B Marketing Agency":

> How to choose a B2B agency
> Capabilities matter. So does culture. See what to look for in our free guide.
>
> Pick a B2B marketing firm
> Know exactly what to look for and how to evaluate it. Download the free guide.
>
> How to pick a B2B SEO agency
> Do you need a vendor, or a partner? Our guide can help you choose. Get it now.
>
> Choose a B2B agency — 6 steps
> Execution vs. strategy — know what to look for. Download the free guide.
>
> Pick a B2B marketing partner

Know what to measure, and what's beyond measurement. Get your free guide today.

Video Script (How-To)

REMEMBER

60-90 seconds is the sweet spot for a how-to video.

People read at about 150 words per minute.

STRUCTURE

1. PROBLEM

Hook the prospect with one sentence that describes a common problem.

It's even better if you can use words and phrases they use themselves to describe the problem, because they'll wonder how you "got inside their heads." We also recommend describing the specific problem of one person. Details give our minds something to latch onto.

2. AGITATE

Talk about what's at stake if the problem isn't solved.

3. SOLVE: PART I

This is the hope. The solution is the product or service. It looks something like: "If you're having this problem, [my product or service] can help." This creates a narrative "through line," a tiny bit of suspense for the prospect about how you will help solve their problem.

4. SOLVE: PART II

This is where you tell them how you will help them solve their problem — typically by describing how it works or by combining benefit + feature statements.

5. CALL TO ACTION

Tell people specifically what you want them to do. Download, free trial, sign up, etc. FYI: We like offering a phone number as a lifeline. It helps overcome any objections a viewer might have about getting started.

EXAMPLE: AMAZON PAY AND WOO COMMERCE VIDEO SCRIPT

1. PROBLEM/HOOK

Chances are you already know that Amazon Pay is a powerful way to engage your customers while tapping into Amazon's years of innovation.

That's not why you haven't signed up and launched yet.

2. AGITATE — (INCLUDE WHAT'S AT STAKE)

The problem is time.

You're running a business and you've got a million other things to do.

So while giving your customers a trusted, familiar payment solution sounds like a great way to grow your business, it's understandable that something always seems to get in the way.

Meantime, opportunities keep passing you by …

3. SOLVE, PART I

Let's change that.

Let's get you signed up and launched with the WooCommerce plugin for WordPress.

Let's do it now.

4. SOLVE, PART II (THE HOW-TO)

Part 1 is signup.

Before you start, you'll need four things:

- Your bank account number
- Your tax ID
- A credit card for verification
- And, a few minutes to focus

Ready?

Just go to the Amazon Merchant Sign Up page and follow the prompts.

Part 2 is your launch.

Here's what to do:

1. Go to the WooCommerce store.
2. Download and activate the Amazon Pay plug-in.
3. Visit the Checkout page and select Amazon Payments Advanced.
4. Follow the on-screen instructions and launch AmazonPay.
5. For more information, see the Amazon Pay documentation.

That's it. You're launched!

Amazon Pay is the perfect way to create loyalty, build on Amazon's years of e-commerce innovation, and help you build your business.

5. CTA

Get started now.

https://youtu.be/Di9eH3k3n_g

Website Copy

REMINDERS

People don’t care about the business, they care about themselves and their own problems and how you can help them solve their problems.

An effective hero message is more discovered than created.

Be clear on the goal for each page, and include at least one specific CTA on each.

STRUCTURE

HOME PAGE

Here’s a simple, proven home page structure. Keep in mind the running monologue going on in the reader’s mind as they read down the page: What is this service? Who provides it? How does it work? Who else is using it? How will it help me/Why should I care? How, specifically, does it work? Who can I talk to? How do I learn more?

1. Headline (What is this?)

The value prop.

2. Subheadline (Who provides it?)

Expand on the headline with something like “[Company X] provides [unique benefit] to [target audience] who need to [do a specific thing].

3. CTA to learn more / explainer video (How does it work?)

A useful headline is something like “Take 60 seconds to see how it works.” But more specific. :)

4. Logo row or testimonials (Who else is using it?)

This is the social proof.

5. Benefits (How will it help me/Why should I care?) and features (How, specifically, does it work?)

This section will typically have 3-5 benefits. Lead with the benefits, and explain them by talking about the features.

6. Now what? (Who can I talk to? How do I learn more?)

Here’s where the call to action goes. Invite the reader to get in touch, download a guide or report, sign up for a newsletter, chat with a rep, etc.

7. Footer

About. Careers. Contact info. Help/FAQs. Terms and Conditions. Etc.

SECONDARY AND TERTIARY PAGES

These depend on the goals of the site. You can sort primarily by:

- audience, e.g.: MLS, brokers, developers (Bridge Interactive)
- action, e.g.: buy, rent, sell (Zillow)
- a mix, e.g.: features/products, customer types, company (Code42; Concur)

Brand Strategy

Summary of an SVC class taught by Devin Liddell, Principal Strategist, Teague.

BRAND STRATEGY IS BASICALLY A 3-STEP PROCESS

Diagnose. Prescribe. Implement

A BRAND SHOULD BE SIMPLE.

If it feels complex, it's wrong.

Put yourselves in the shoes of customers. They're bombarded with 3,000-30,000 marketing messages per day.

The average person consumes (reads or hears) ~100K words per day. More than a novel!

What's that mean?

Nuance kills.

Psst … Note to creatives: Gaining a fluency in brand will put you in the brain trust and make you harder to replace. You become a "head" instead of just another "hand." One you can't live without. The other you can.

WHAT'S "BRAND"?

Brand is net perception. AKA: what people think of you.

WHAT'S "BRAND STRATEGY"?

Brand strategy is a deliberate plan to achieve a net perception.

WHAT'S "BRAND DESIGN"?

Brand design is the crafting of cohesive experiences that tangibly express a brand strategy to create net perception.

WHY INVEST IN BRAND DEVELOPMENT?

1. To resist commoditization.
2. To command a premium price.

WHO OWNS A BRAND?

Not the company. Consumers.

Net perception lives in a person's head. A company becomes a steward of that perception.

At best, brands are a mechanism for citizens to hold companies accountable. At worst, we're paying mental rent to corporate presidents, as Chuck D. said.

Successful brands are most often belief-driven, but elastic.

ARCHETYPES

Most brands are some version of Jung's 12 archetypes.

1. The Innocent
2. The Everyman/Everywoman
3. The Hero
4. The Caregiver
5. The Explorer
6. The Rebel
7. The Lover
8. The Creator
9. The Jester
10. The Sage
11. The Magician
12. The Ruler

There's often a dominant archetype and a subordinate archetype.

Brands, like archetypes, arise unconsciously.

The role of the brand strategist is to uncover the archetype to reveal the brand's best self.

BRANDS NEED ENEMIES

Tom's is shoelessness.

Apple's is "The Man."

Harley-Davidson's is "suburban malaise."

Ask: "Who or what are you against?"

BRANDS ARE ABOUT CREATING AND INTERPRETING SYMBOLS

We need tribal signifiers. So give 'em to people.

Like how Apple includes those stickers in the box.

BRANDS ARE ABOUT MAKING ABSTRACTIONS REAL

Functional attributes must always ladder up to emotional benefits.

Companies overconsider logic and rationality.

A brand's strength is often a measure of the illogic you create. Red Bull gives you wings.

HAVE AN AUDACIOUS VISION

Goal of a brand: To create genuine affection.

We want people to say, "I love that brand."

So ...

create things that are worthy of affection.

POSITIONING

Consumers regard 70% of brands as "disappearable."

Positioning = what you want to be known for. It's how you exist relative to other brands.

You want to be at an edge, not in the middle.

"The middle is where brands go to die."

Where should your brand be? At the place where these four circles overlap:

- What audiences want
- What you're great at
- What competitors aren't doing
- A powerful WHY

Positioning is about narrowing.

And that is counterintuitive. But to compromise is to lose.

You only inspire indifference.

"The opposite of love's indifference" – The Lumineers

Be clear about what you stand for and let the chips fall where they may. It's okay to be hated.

Brand criteria – your brand must be

- differentiating
- compelling
- believable
- deliverable
- sustainable
- singular (narrow)

BUT BUT BUT ...

Positioning is an older model.

The flaw is that it makes your brand reactive.

Instead, think ...

POSITION

Brand "Position" is based on belief.

Tom's and Zappo's, for example, doesn't compete against other companies in their industry.

Position-based brands have an emphasis on culture.

They’re belief-driven. Lyft, Nike, Southwest.

Position is about what you most fervently believe in, even when no one else does.

(At Southwest, for example, they talk about the warrior spirit.)

The way to construct a position statement is: “We believe [X]. That’s why we do [Y].”

Position-based brands are more concerned with doing than talking.

Position-based brands require a manifesto. A statement of belief.

BRAND DESIGN

It’s shifted, from

mass communications that address averages

to

targeting differences, and custom communications.

The modern brand is not right for everyone, “It’s just right for me.”

ALL BRAND DESIGN IS ABOUT BUILDING ON UNIQUE, EXAGGERATED CHARACTERISTICS

Human brains are not good at detail. We’re better at big ideas. The brain wants big characteristics. (Note: Internal politics often inhibit differentiation.)

Who creates the best brands?

Dictators. Like Joseph Stalin and Steve Jobs.

How can we make the brand more emotionally resonant?

Bags! Scarves! Totes! Give them artifacts to show tribal loyalty.

WRAPPING IT ALL UP

Organize around belief.

Go for love over loyalty.

Solve small problems that feel big.

Make the brand “ownable.”

Know the journey; design for the seams. “Seamless” doesn’t exist. (Uber, for example, fixed 2 seams: dispatch and payment.) Operate with transparency. Include the client in the creative process.

Membership. Share the future. E.g.: via season tickets or subscriptions (REI, Costco, Car2Go).

OH, AND B2B VS. B2C?

“The distinction is totally artificial. The mechanism is the same.”

Creative Brief Template

FORMAT FOR AN AGENCY BRIEF, LUKE SULLIVAN-STYLE

Source: Luke Sullivan

Client name:

Product:

Description of job:

Due:

Instead of this	Try this
Business problem	What problem are we trying to solve for our user?
Target audience	Who is having this problem?
What do we want them to think or feel?	What is the best way to help them solve it?
What is the ONE THING the advertising has to say?	What could we do or make?
What are the support points?	What would make people share it?
Tone of voice	How can they participate in the experience?
Mandatories	What is the context (where and when) for engaging?

Also:

What makes the product or service remarkable?
How might we do things differently?

Discovery Questions

Short set

- Who is our audience?
- What problem are we trying to solve for them?
- How are they trying to solve it now?
- What “villain” keeps them from solving it?
- What’s the risk if they don’t solve it?
- Why should they care about our solution?
- What objections do they have to our solution?
- What’s their state of awareness? (Our goal is to move them to the next state.)
- Where will they encounter our copy? (How will it be read?)
- What’s the single most compelling message that must be communicated?
- What’s going on in the marketplace?
- What makes the solution remarkable?
- What do we want prospects to think, feel, and do?
- Is there anything else we could do or make to help the prospect solve their problem?
- What would make people share it?
- What assets can we take advantage of?
- What story do our prospects tell themselves about this brand?
- What words do our prospects use to communicate about themselves, or the problem they have?
- What is the truest thing we can say about this product or service?

Long set

BASIC DETAILS

- Client’s name, address, and contact details.
- Company: What does it do? How does it do it? Why does it exist?
- When was the brief taken and when is the copy needed for?
- Does this relate to any previous jobs?
- Will it be part of larger communications or is it stand-alone?

OVERVIEW

- What problem are we trying to solve?

- What are the deliverables? What is the client expecting from the project and from us?
- What is the background and context for the communication? In other words, what was the previous marketing or advertising activity, and what are the reasons for doing this new project or campaign?
- What is the timeline and when do we need to respond and with what (e.g.: RFP, first draft, etc.)?

BACKGROUND AND RAW MATERIAL

- What material has the client produced before and how did it perform?
- How does this campaign fit in with other communications from the client?
- What is being provided as content to develop?
- Are there further sources of content (customer data, surveys, transcripts, raw material, subject-matter experts, etc.)?

TARGET AUDIENCE

- Who are we trying to reach, and what route are we using?
- What are they like? Age, gender, profession, interests, hopes, fears, etc.
- What objections do they have to the product? What are the risks for them?
- What do they think about the client? What position does the client occupy in their mind, if any? What associations can we tap into?
- What do we want them to think? Feel? Do?
- What's going on in this marketplace? How crowded is it? (Note: We can ask this of the client, and it will be interesting to get their perspective, but we should expect to do our own research.)
- How aware of the product is the prospect?
- Where will they encounter the copy?
- What words or phrases do prospects use to talk about the product? (Ask as appropriate — this is also something we should expect to research.)

THE CORE THOUGHT

- What is the single, compelling message that must be communicated? (Note: There will usually be one, but not always.)
- What supporting evidence is there to back up any claims being made?
- What are the product benefits? Features?

THE UNIQUE SELLING POINT

- What benefit does the product provide to the audience?

- What makes it remarkable in the marketplace?
- Why should the reader bother to read all of the copy and respond?
- What are we really selling?
- What is the truest thing we can say about the product? (Even if it's unflattering.)

CREATIVE DIRECTION

- How should the finished work look and feel? What is the tone?
- Is there a brand style that must be adhered to?
- Are there examples of similar work that can be used as a guide?
- What's the most appropriate tone of voice?

ANYTHING ELSE?

- E.g.: Word or page count, client quirks, key stories or anecdotes.

Ethnographic questionnaire

GOAL

To get inside the head of our target audience and find out their motivating psychology. Ethnography, by the way, is the study of people in their own environment through the use of participant observation and face-to-face interviewing.

QUESTIONS FOR THE BUSINESS CLIENT

- Tell me a bit about you and your background.
- Tell me about the competitive landscape.
- Who are your competitors and what are they known for?
- If I'm a company, why would I choose you over someone else?
- What changes for the customer after they hire you?
- Describe your ideal customer — as a person. What do they do? How old are they? What do they wear? What decorations do they have in their office?
- What's your favorite customer story?
- Find a small moment. E.g.: Can you recall a time recently where you did something that you just would've never been able to do or have the confidence to do [before] and it occurred to you, 'Wow, I'm actually doing this?' "

QUESTIONS FOR THE BUSINESS’S CUSTOMER

- Tell me about you and what you do.
- What was your initial experience with [the client]?
- How do you work with them now?
- Can you name 5 words you’d use to describe [the client]?
- What’s changed for you since you started working with them?
- In your workflow, how much time do you spend interacting with them?
- Have you recommended them to other people?
- Can you describe the service they provide?
- If tomorrow, [the client] said, “We’re closing up shop,” how would you feel?
- How would you replace them?
- On a scale of 1-10, how strongly do you feel about [the client]? “10” means you can’t live without them.
- What other brands does [the client] remind you of?
- Close your eyes. Imagine you’re at a cocktail party. What is [the client] like? Are they the person on a table? A wallflower?
- Can you tell me a story about [the client]?
- Find a small moment. E.g.: Can you recall a time recently where you did something that you just would’ve never been able to do or have the confidence to do [before] and it occurred to you, ‘Wow, I’m actually doing this?’ “
- Anything else we should know?

Ideas

Repurposing content

When you've put time and resources into creating the content for a core deliverable (e.g: a white paper), use that information as many ways as possible.

For example, core content can be repurposed to become the foundation for:

1. A single, high-level blog post (or a series of blog posts).
2. Social-media posts (which could also drive to the blog posts).
3. An email drip campaign (or nurture mails).
4. An eBook (which could be expanded to include a supplement that includes answers to readers' questions).
5. Quora posts.
6. A physical leave-behind.
7. A sales sheet.
8. A slideshare presentation.
9. A live presentation.
10. A video (or series of videos).
11. A workshop.
12. A podcast (or series of podcasts).
13. A webinar.
14. An infographic (and/or "chunkable" social microcontent (mini infographics/stats).
15. Content for newsletters (internal or external).

General ideas

INBOUND MARKETING

Use advertising to drive prospects to any number of educational opportunities, such as video tips, webinars, eBooks, podcasts, etc.

SEO

BLOGGING

Go to your sent email folder and find a dozen or so questions you've answered from clients and prospective clients. Now, turn each of those into blog posts. Calendar them out.

Also: What kinds of questions are people asking early in the shopping process? Blog about those things. Then, blog posts become a lead-gen source.

SOCIAL MEDIA

PAID TRAFFIC

EBOOKS

Or anything a customer would trade their contact info for.

TOOLS

Like an ROI calculator or a process-documentation spreadsheet.

Specific ideas

CREATE A THREAT-RESPONSE NEWS SITE

Make it the go-to, brand-independent, resource for news, tips, and resources. Example: IBM's Security Intelligence site.

BUILD A THREAT-RESPONSE SIMULATION CENTER

Host clients at the company campus and train them to respond to threats. Or, create a mobile simulator in a semi truck, and take it to companies and conferences, a la the IBM mobile cybercommand center.

CREATE AUDIO CONTENT (PODCASTS, AUDIO BLOGS)

Take your company vision to an extreme.

Why do you exist? Could you be the Harley Davidson or Patagonia or Toms of your industry? Take your vision and find relevant causes or organizations to sponsor, providing them with threat-response resources. Then, use the effort to inform your content marketing, internally and externally. That way, you become a belief-driven brand, which is really hard to compete with.

SEND A QUARTERLY PUBLICATION

Example: Mohawk Connects, a beautifully produced quarterly magazine printed (of course) on Mohawk paper.

TAKE SOMETHING YOU ALREADY DO TO AN EXTREME

Example: The 508-page product catalogue from Maxon Motors.

CREATE A MANIFESTO

Combine serious values with organizational quirks, and use it in your marketing materials. Example: The Holstee manifesto.

INFINITY PASS

Not just a lifetime pass to a product or service, but a pass that never expires. It can be handed down to children and grandchildren.

CONTEST

Enter your email to win a prize.

QUIZ

Create a fun quiz on a topic relevant to the target audience. E.g.: Essentia Water's HyQ Challenge, which tested users' knowledge of hydration. The test was 3 sections of 5 questions each, results were shareable socially, and each person who took the full quiz got a badge indicating their knowledge (flounder to dolphin) and was entered in a drawing for a year's worth of water.

EVENTS

Sponsor a talk or meetup or conference. Get product or service in conference swag bags.

STUNTS, PROMOTIONS, PLATFORMS

What kind of crazy activity can you do that grabs attention. E.g.: An outrageous billboard, sponsorship of something controversial; Howard Gossage and pink asphalt, composer sweatshirts, the misspelling skywriter, the paper airplane contest. Think of the tangents where you can meet prospects and pull them in.

What kind of real-world events can you tie into, like a road rally or a road trip or an arts event.

An idea a startup airline had was to have a "flight simulator" – a sample airline seat or two where prospects could sit, talk, and sample food and drinks. The "simulator" could be towed on a trailer to office buildings or events.

DESIGN BUILDS

What can you physically do to capture attention and give a gift to prospects? E.g.: Pemco's "yelfie" booth at Qwest Field. Fans would see how loud they could scream, and it would be captured on video and shared socially. Other ideas (stolen from Alarming Industries): an urban vacant lot in DC turned into a campground for REI; a "sunwashing" station for Sierra Mist.

POPUP STORE

What would this look like for a tech company? For online security, maybe you drive around in a refurbished armored car and give people the "security experience." Everyone wants to feel safe.

PHYSICAL MEDIA

It's so neglected, but a gift or direct mail piece or physical newsletter can be an amazing artifact. E.g.: Mohawk Connects.

Small-batch direct mail. You will receive far greater results targeting 50 or 100 ideal prospects a month and reaching out with a personalized letter outlining one highly actionable idea than any other form of mass communication out there

OFFER A RIDICULOUS GUARANTEE

E.g.: Triple your money back at any time, no questions asked. Or, an eternal guarantee, e.g. for a maker of fine furniture.

IN-STORE PROMOS

How can the experience in the store (or real world) feed the online experience, and vice versa?

SUBSCRIPTION

How can you offer your product or service as a subscription? (Productize.)

GO TO EXTREMES

List out all the steps in your sales cycle, from awareness through purchase through post-purchase through referral.

Now ask: How can each be different?

Then ask: How can I take each to an extreme?

HELP PEOPLE

How can you help people in a way that's not directly related to their buying something from you?

Just helping will create goodwill and build an emotional connection with prospects.

TEACH

How can you teach your prospects about your industry? (This will build trust, and trust wipes out consideration of cost.)

How could you be 10 times more valuable to your customers?

START SMALL

What tiny little commitment can you get from a prospect that you can capitalize on?

MARKET TO YOUR PEOPLE

Companies that treat their employees well treat their customers well.

THANK YOUR CUSTOMERS

Incentivize employees to write physical thank you cards. It can have a huge impact. See the book "Influence" for a great example of this.

CREATE A PRODUCT AFTER-CARE PROGRAM

SHOW PRODUCTS "BEING BORN" IN A WAREHOUSE.

CREATE AN IN-STORE EXPERIENCE – FROM STORYTELLING TO SERVICE EXCELLENCE (SHOPPING AS THEATER)

POWER TO THE FRONTLINE!

Frontline employees are often the under-leveraged face of your brand and core to providing differentiated customer experiences

START FROM WITHIN

Do something daring, like raising everyone's salaries or guaranteeing your product or service for life or making a crazy commitment to the environment.

ONE DEEP DISCOUNT

Run fun, crazy and/or creative promotions around one deeply discounted item. The item acts as a "loss leader" and, if the merchant does a great job of making the promotion memorable the one-two punch of fun in-store happening and deep discount will drive TONS of traffic.

Ideas for a barbershop

Shift the mindset around empty seats. For open appointments, can you treat them the way the airlines or hotel chains treat unsold inventory? Thinking that way may open up some creative options around pricing.

Offer "standby" pricing. E.g.: Post to Facebook and Twitter saying, "We have a slot open in 20 minutes. Half-off to the first person to reply."

Opaque pricing. People can buy a service for a Tuesday, but can't pick the time. Price: $21 (half the standard), and we let you know on Monday afternoon what time to show up.

Headshot Tuesdays, Pay it Forward Wednesdays, Atonement Thursdays, etc. The Headshot Tuesdays idea was to offer a free professional headshot to all customers on a particular Tuesday. They'd get a great photo for LinkedIn, company intranets, or dating profiles. And it would be a great way to spark a "wow you look great" conversation.But you could add other themes. For example, you could let people know that Wednesdays are "Pay if Forward" days, where they can pay extra (for the amount of a bottle of shampoo, or a shave, or a full cut), and that money would be given to someone in need.You could also have a day where any extra amount people pay will be donated to a charity. (Kind of how Dick's Burgers does it.) E.g.: a diabetes foundation.

Get the barbers themselves to think entrepreneurially — online and offline. Can they use social media to bring in customers? ("Hey, nothing says 'I care' like a smooth face. I'm completing my straight-razor certification. I've got a spot open for a free shave today from 1:15-2.")Walk outside the building wearing distinctive Capelli's logo shirts and offer a 1-minute neck trim to men passing by (and then give them a Capelli's card).

Set up a roving neck-trim station. You could do this anywhere. Conferences, sporting events, outside of nightclubs.

Groom Squad. Can you send teams of 2 barbers out to a convention, for example, and just park them at a booth on the convention floor?

Run a giveaway. "Drop your card in the bowl for a chance to win ... " "Free 1-year membership for the most referrals or FB shares," etc.Prizes: 1 free Executive Signature Haircut membership or Executive Buzz Cut membership. 5 monthly Signature or Buzz Cut memberships. 10 packages. 25 product kits. This would be to build your email list.

Get interviewed/speaking engagements. Can you get on Mixergy, for example. The story of "cutting edge tech + cutting hair" could be compelling. There are also tons of business and marketing podcasts out there. Are there business groups you can speak in front of?

Can the store space be used for other purposes? E.g.: Can it be overflow meeting space after hours or on weekends for people in the same building, or for existing clients? Free of charge, but a good way to build loyalty. Another idea: Offer to have people host their podcast or webinar at Capelli's on weekends. You provide the setup, and they provide some free publicity.

The $1,000 haircut v1. They get the haircut, but they also get an hour of business consulting time with you and Bob about how to build their business. And the consultation is guaranteed to help.

The $1,000 haircut v2. We pick them up in a limo, get them a massage on site, get them a great haircut, buy them lunch, and limo them back home.

The $5,000 haircut. Same as the $1,000 haircut v1, but with the entire investor team thrown in for the hour.

Get in conference swag bags

Reach out to concierges.

Direct mail. It's old-school, but effective. You could send manifesto postcards, for example.

Monthly newsletter. Themes: Provide helpful business content to customers and prospects. Tell the Capelli's story as it happens.

Retention emails. Can we better target people — especially those who came once and didn't return?

Lead gen via a personality generator. I was curious about a FB banner ad I saw that teased a "finding your business personality" survey. I clicked, because I wanted to see how they used it to generate leads. Sure enough, you have to enter your email address, and then you get to take the test.It got me thinking, though, about all those personality tests out there. The idea is to create a "Find Your Movie Personality" quiz for men, where you run them through a series of questions or choices and arrive at some kind of movie-character archetype that tells you who you're most like, what you should wear, drive, eat; who you should sleep with, what your catchphrase is, and (key for Capelli's) what kind of hair you should have.You could use Jungian archetypes as the basis for the personality types, and map the movie characters onto them.) Despite its being a marketing artifact, it could be funny, and actually useful.

Training. Promote your employee training as proprietary, rigorous. Process oriented. Describe the process on the website, then point people to it. Then leadership can preach "The Capelli's Method" in his emails, podcasts, etc.

Ideas for partnering

EBOOK

Create an information rich, education focused eBook and/or webinar and reach out to other related businesses and ask them if they would like to cobrand the eBook or offer the webinar to their network free of charge.

SPONSOR A WEBCAST

CROSS-PROMOTE

“Complete the service,” e.g.: Pair a barbering offer with an offer from a clothing store or gym.

GET ON OTHER PEOPLE’S DISTRIBUTION LISTS

Pay, barter, etc.

PARTNER WITH SCHOOLS

CUSTOMER OUTREACH, REFERRAL INCENTIVES

CALL CUSTOMERS POST-PURCHASE.

REFERRAL CARDS

Whenever someone makes a compliment, have a referral card ready.

GIVE THEM THEIR FIRST PURCHASE FOR FREE

Customers who spend $400 at Gemset of Saratoga Springs, NY, which has provided high-quality jewelry for 20 years, get a $400 coupon towards their next jewelry purchase of $1,200 or more.

REFERRAL BUCKS

With each sale, give the customer [5] [$100] referral bucks certificates. The certificates have the customer’s name on them. Customers are encouraged to give them to friends, family and neighbors. Each time one of those coupons is used, the customer who gave them away also gets $5.

FREE ITEM ON ANNIVERSARY OF PURCHASE IN EXCHANGE FOR REFERRALS

ASK FOR REFERRALS IF SERVICE IS COMPLETED AS PROMISED

OFFER CUSTOMERS “FINDERS FEES

SET UP A FREQUENT-REFERRAL CLUB

ASK FOR TESTIMONIALS FROM EVERYBODY, THEN PRINT THEM UP AS A PHYSICAL BOOK.

SEND LUMPY MAILINGS TO REFERRAL PARTNERS

Water bottles, etc. Plus, letter suggesting referral ideas.

GET IN SWAG BAGS AT CONFERENCES AND EVENTS

Ideas for physical spaces

HOW ELSE CAN YOU USE YOUR BUILDING?

- Offer your space as a meeting place to other orgs.
- Offer food.
- Create a memorable monument sign.
- Make it a shelter for people in need.
- Put your manifesto on the front window.
- Roll out a red welcome mat. Put rose petals on ground. Write in sidewalk chalk.
- Label your packaging.
- Put something in your parking lot. Bright paint. Benches with messages.
- Fly some flags; hang banners — make it festive.
- Decorate your outside walls. Mural.
- Move out a portable sign.
- Ad plants, flowerboxes, landscaping, flowerpots.
- What else can you sell? E.g.: quilts in a furniture store.
- Balloons.
- Have your parking lot patched and sealed.
- Have a grand opening. Or a grand re-opening.
- Put live models in shop windows.
- Hire an improv group to do an event.

OFFER SECRET AFTER-HOURS SALES

OFFER SEMINARS

Or a teaching event or workshop.