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Business Writing for Information Technology

Flying in Formation:

Practical Solutions for Implementing Corporate Branding and Marketing Communication Strategies

A White Paper
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Abstract

Developing the right branding and marketing strategy for a corporation is only the first step in successful marketing communication. Implementing this strategy—making sure that all brochures, Web pages, press kits, stationery, catalogs, and other items are coordinated and faithful to strategic marketing guidelines—is far more difficult. This is especially true for marketers in corporations who must coordinate the efforts of many communicators across multiple departments.

Marketing implementation at a corporation is a continuous balancing act. On the one hand, the marketer must respect the unique needs, goals, financial situations, and even cultural identities of different divisions and departments. On the other hand, the marketer must persuade different communicators to support an integrated, consistent marketing approach at all times, an approach that reflects the branding and marketing strategies of the corporation as a whole.

This paper proposes five techniques for effective marketing communication management: (1) top-down/bottom-up buy-in, (2) branding road shows, (3) the Concierge Model of marketing, (4) Best Practices programs, and (5) ongoing review and improvement.

The Care and Feeding of Wild Ducks

Thomas Watson Jr., the former CEO of IBM, often told a story he had found in the writings of Kierkegaard about wild ducks. The ducks were admired by a nature lover who began to put feed out for them as they were migrating in autumn. They grew dependent on the feed and soon stopped flying south. In fact, after several years, they were so fat that they barely flew at all. Watson always ended his story by saying, “The duck who is tame will never go anywhere. I’m convinced that IBM needs its wild ducks, and we’ll never try to tame them.”

Watson was talking about IBM’s “outlaw heroes,” eccentric employees who constantly bucked the IBM system—one scientist always rode his Harley Davidson through the IBM lab—but who often wound up making brilliant discoveries, in part because IBM tolerated their eccentricities and let them follow their instincts. Watson was well aware that some of IBM’s greatest products had been created by these “wild ducks.”

At one meeting, however, an employee (a marketer perhaps?) spoke up. “Yes, we need them, but even wild ducks still fly in formation.”

Both points are crucial. As Peters and Waterman point out in their classic study, *In Search of Excellence*, successful corporations have simultaneously “loose-tight” properties. Core values and goals are accepted by everyone without hesitation. Whether these values refer to service excellence, product quality, or a commitment to growth, everyone “flies in formation.” At the same time, exactly how these values and goals are manifested in daily business depends on a range of solutions that include the untested and unorthodox. “Wild ducks” must be both tolerated and encouraged.

The ideas and solutions presented in this white paper are based primarily on my own experience as a communicator. This includes over twenty years as a marketing writer, consultant, journalist, and director of communications, working with Fortune 500 companies as well as small start ups. I have also gathered research and spoken with other marketing communicators responsible for strategy implementation. All five solutions discussed below have been repeatedly proven in the field.

Marketing the Value of Marketing Implementation

At first glance, it might not be clear why there should be a problem with implementation in the first place. Most everyone would agree that marketing is important. We all know that organizations have to keep growing. Revenues have to keep coming in. The future will probably include rising costs and increased competition.

However, the implementation of a marketing plan is often—invariably, I would say—a far larger and thornier problem than anticipated. After the marketing strategy announcement, after the balloons have sailed away and the fanfare dies down, implementation often runs smack into the hard realities of the workplace.

Let me stress this point again:

> **A marketing communication plan, like any other business plan, is never sufficient in itself to ensure the complete success of its implementation.**

To use even simpler terms:

Writing a style guide is never, ever enough.

Despite the best laid plans of management, secretaries keep using the old stationery for months, even when the new versions are sitting in the closet. Staff members forget to pick up their new business cards, the ones with the proper design. Project managers, trying to get a last-minute project out the door, “forget” to send it to marketing for review. Marketing, after all, might insist on changes or even want to cancel the whole project.

Not all these problems occur all the time, of course. But when so many things can go wrong, a number of them invariably do. Bootleg brochures can crop up like sturdy weeds. Logos can undergo strange metamorphoses, changing their shapes, colors, and taglines from project to project. Letterheads can appear as if designed for different corporations. Messaging and positioning can drift out of focus. Design quality can vary enormously, from the excellent to the downright embarrassing. And as for marketing feedback, a communicator in one department might track effectiveness through carefully planned surveys and focus groups. But others might judge response by a few conversations in the hallways and their gut feeling.

A lot of this is human nature—marketing guidelines are not at the top of the list for most people. Many managers might not see why standardized design, messaging, and formatting is such a big deal. Corporatewide communication standards can strike some as fussiness, others as just one more example of niggling bureaucracy.

Compounding these problems is the fact that standards compliance must be carried out in corporate cultures that usually value tolerance, creativity, and diversity in its employees—its wild duck-ness, you might say. The marketer must respect these cultural values. A healthy corporation is not a machine, nor should it be.

The marketer must also recognize the strong autonomy enjoyed by the corporation’s departments. These departments may have unique communication needs, goals, and messages, based on critical differences in

- Duties—what tasks are performed, with whom, and how.
- Revenue—whether a department is perceived as a cost center or profit center.
- Budgets and costs—these vary depending on salaries, research costs, capital investments and other expenses.
- Size and/or perceived importance—HR might not carry the same “weight” as R&D.
- Culture—Technologists can be very literal-minded about product features and insist that a product’s capabilities must never be exaggerated. After all, they are the ones who have to “deliver the goods” after a sale. But sales personnel also know that they sometimes have to “sell the future” in order to survive in a highly competitive marketplace.

Other problems could be mentioned: office politics, turf wars, management and staff churn, reorganization, and so forth. But I think the point has been made. Implementation is a complex, sensitive, and ongoing process, and it always, without exception, involves marketing the value of marketing itself.

Five Practical Solutions

The following solutions can help ensure that the marketing strategies and guidelines that were approved by the CEO will be the same ones actually used by the administrative assistant in Shipping. These solutions have proven to be successful in large corporations such as IBM, Microsoft, Tandem, and KPMG, as well as in a range of smaller organizations.

In essence, each solution is a matter of strong *relationship building* everywhere and at all levels—relationships in which both local autonomy and centralized control are kept in careful balance.

Each solution can be used on its own. Ideally, all five will be used together, each one enhancing the success of the others.

1. Top-Down/Bottom-Up Buy-In

Marketing is not an exercise in democracy. A marketing communication plan is developed and issued under senior executive direction, and once it is approved, everyone should fly according to plan— in theory at least.

At the same time, a marketing plan is never implemented by fiat. Instead, the marketer, if wise, carefully creates a hierarchy of encouragement across the corporation, based on persuasion, diplomacy, and service. Equally important, this hierarchy of encouragement works both ways, with personnel at every level encouraging compliance at other levels.

Buy-in has to begin at the very top with the CEO, and that person must always be the first champion of a corporatewide marketing plan and its implementation. The CEO's approval and support must be

1. Highly visible to all employees.
2. Understood by everyone in terms of its direction and rationale.
3. Backed by budgetary commitment. **Follow-through costs money!**
4. Repeated on a regular basis.

IBM has one of the strongest brands in the world. It is based on a commitment by top management to the value of strong and well-positioned branding. This branding has served them well. The logo and designs created by Paul Rand have becomes icons of modern culture that are worth billions of dollars to the company. The CEO of any corporation, along with the vice president in charge of marketing and his or her supporting staff, must be equally committed to the development and implementation of strong branding and consistent marketing communication.

This commitment must be echoed by the vice presidents, department heads, directors of communication, and any others involved in communications, such as in-house designers and writers as well as outside vendors. Every management level must agree to take responsibility for implementation by the communicators who report to them.

At the same time, this buy-in must be bottom-up. In practical terms, this means that the marketer must approach communicators directly at every level of the corporation—even down to managers, specialists, and administrative assistants, if possible. A champion must be found at every level in every department, someone like the director of communication or whoever is in charge of marketing communication.

This bottom-up buy-in can be a laborious process, but it is a crucial part of the implementation. The marketer needs to meet separately with each director. Together, they can make an audit of existing materials. They can also discuss the existing marketing and branding of the department. Does the department already have a strong brand? What are their current marketing goals? Two years out? Three? Five? Who is their audience? What is the perceived or current value of their product or service? Is there a difference between this value and the one they want to communicate to their audience? Who is the competition? What is their Unique Selling Proposition, if different from other departments or the corporation as a whole? And finally, how does their branding and marketing fit with that of the corporation?

By discussing these issues, the marketer can better understand the unique situation of each department. Some might not have a strong brand in place. If that is the case, the marketer and communicator can start developing one in the context of the corporate marketing plan. Other departments may already have a strong brand which they feel should be retained. If so, the marketer and communicator can begin the process of integrating this brand so it can leverage off the corporate branding and even off branding in other departments.

The marketer needs to reassure communicators that their current projects and branding can—and should—reflect their own unique needs, their wild-duck variations. Compliance does not mean that their wings will be clipped. At the same time, the marketer should remind the communicator of all the advantages of collective effort. To put it in concrete terms, if a communicator can leverage the combined marketing and branding of all the other departments, plus the general branding of the corporation as a whole, then that communicator can, in effect, multiply budget, resources, and staff by an enormous number overnight. Flying in formation has its rewards.

If managed properly, top-down/bottom-up buy-in process results in a strong, broad-based acceptance of the marketing plan.

2. Branding Road Shows

A corporatewide acceptance of the marketing plan can be supported by four other activities.

After the announcement of the marketing plan, many marketers reinforce the buy-in process with a Branding Road Show. This show should be a lively, comprehensive presentation of the branding, addressed to as many communicators and vendors as possible, but in small groups to allow for questions and comments from the audience.

The show is an opportunity for marketing to show off new logos, designs, messaging, guidelines, templates, and other items. It should generate excitement and reinforce the idea that everyone will be working together to help make the corporation's marketing plan a reality. It is also an opportunity to explain the marketing plan itself in greater detail and to assess audience reactions to the plan.

The presentation should include messages like these:

- "Everyone has been doing a great job, and management applauds your efforts. You obviously have the skills. Now you can do your job even better with these new tools."
- "This marketing strategy is a new step forward, but it represents an evolution, not a revolution. Our existing brand equity in our brand must and will be preserved. All that hard work you did in the past has not been in vain but will serve as a strong foundation for future communications."
- "Marketing will work closely with you in using these tools. We're here to help, not direct or get in the way of you doing your job. Your department will still retain its autonomy and it own unique identity. But your communications will become even more effective when you can leverage your efforts with others in a coherent, corporatewide communications program."

This Road Show is also an excellent opportunity to introduce copy and design communication kits, available both online or in hardcopy. These kits should contain items such as

- A writing usage style guide that provides information about basic usage as well as usage specific to the corporation, such as the correct way to spell its name—you'd be surprised at the variations—or the correct names of administrative offices. The writing usage style guide should be based on and refer to another, generally recognized style guide such as *The Chicago Manual of Style*, which can serve as an additional authority for other usage questions. Any question not covered by these two guides should be referred to the marketing office. In any event, the corporation should have a well-developed and consistent house style for both copy and design.
- Boilerplate descriptions of the corporation, such as those found at the bottom of press releases. In addition, approved and up-to-date descriptions of the corporate vision, mission, proper taglines, products and services (including their main features and benefits) should be available on the corporate intranet. This way, they can be easily cut and pasted into documents and presentations.
- A design style guide with proper logo usage and layout grids for brochures, paper systems, Web pages, and the like.
- Proper logo colors in RGB, CMYK, and PMS, along with HTML equivalents, preferably in browser-safe colors. The kit should also provide samples of secondary colors that go well with the logo color(s). The hardcopy version can include actual color swatches on paper.
- Logo files in GIF, JPEG, TIFF and other formats.
- Logo restrictions.
- Guidelines about proper usage of trademarked and copyrighted material, as well as the correct insertion of trademark (™) and copyright (©) marks. Include legally correct disclaimer boilerplates.

The Branding Road Show should not only educate but also entertain and help generate enthusiasm for the image-building process. It should also be an occasion to reassure communicators and celebrate their past efforts.

3. The Concierge Model

Sometimes the marketer is considered simply as a “logo cop,” sniffing around to find violations of the style guide. Obviously, this should be avoided at all costs.

A much better strategy is the Concierge Model. This model relies on the fact that one of the most powerful ways to influence people is to help them do their job.

A marketing concierge provides communicators with the tools, information, and assistance they need to properly implement marketing communications guidelines. As much as possible, the marketer offers ready-made solutions such as templates, boilerplate descriptions, and so forth. By making these solutions readily available, the marketer has much better control over branding, messaging, and communications.

The marketer should provide concierge services with the following in mind:

- Service must be provided on a proactive basis. Don’t wait for the phone to ring. Provide communicators with new updates and tools on a regular basis.
- Make sure that design kits, whether online or in hardcopy, are complete and up-to-date.
- Consider corporate communicators as marketing’s “service customers.” As with any service business, do not assume that you know what

customers want, but rather listen to what they say and then tailor your offerings to their needs. Be ready to go that extra mile to retain their loyalty.

- Above all, stay in close touch with every customer.

The marketing concierge should be the first resource that comes to mind when any communicator needs help or wants a question answered. And the more the concierge can help, the better chance that communications will reflect the marketing strategy and guidelines.

4. Best Practices Programs

At regular intervals, at least once a year if not twice, the marketing team should hold a corporatewide Best Practices event. Communicators from all departments, including directors and their staff, will gather to meet, talk, learn, and award outstanding achievements in communications. The event can include guest speakers, seminars, and workshops. New marketing initiatives can be introduced. Problems can be discussed. At the close, the departments present what they feel are their best efforts, a vote is taken, and awards are presented in several categories.

A Best Practices Program offers corporate communicators the same advantages as any professional convention and awards ceremony:

- **Cross-pollination:** Communicators can talk directly and horizontally across organizational boundaries. They can network, form relationships, and break down vertical departmental “silos of information.” They can share solutions to the same problems. They can trade strategies and locate new vendors. They can vent, grouse, and share frustrations. They can investigate co-marketing projects between divisions that might have been otherwise ignored.

- **Personal recognition:** Communications can be a lonely job. A team can knock themselves out getting a brochure out the door on time, then wonder if anyone ever noticed. Best Practices awards are an effective way to boost morale and provide much-needed recognition to directors and staff. Awards, however small, also encourage an atmosphere of excellence and healthy competition. They give us a personal goal to reach toward, another honor to put on our resume. Awards work. They have an almost magical ability to motivate us and help us feel better about our job.
- **Strategic reinforcement:** By meeting and presenting awards, a horizontal subculture of communicators can be developed over time that serves as a foundation for effective marketing. This subculture is where strategic implementation will succeed—or fail. If communicators meet on a regular basis, either at Best Practices events or in monthly discussions, the chances are improved that common strategies and themes will develop, that peer recognition will encourage better quality, that a corporatewide identity can be cultivated and then broadcast through multiple channels in a consistent way—all the benefits, in other words, of good marketing.

As a follow-up to Best Practices events, winning projects should be kept online in Word.doc, PDF, or other formats for use as a permanent reference. This also applies to any successful project. If a direct mail package prompts a 10% response, if a development campaign is a hit, if a funding campaign reaches its goals, then these successes can be showcased online and used as a model by other communicators, helping to continually enhance the quality of communication .

5. Ongoing Review and Improvement

There should be no finish line in marketing communication. Every activity of the communicator—every flyer, event, Web page, and postcard—should be reviewed on a regular basis, with feedback used to update or improve the product, service, or event.

This review can be handled in a number of ways, depending on format and medium :

- **Tracking direct response rates:** Direct mail campaigns that include an 800 number, a Business Reply Card, a coupon, or other ways to respond are able, by their nature, to measure their own success. If response translates into revenue, the marketer can also determine cost-justification as well. Even so, response rates should be carefully tracked and the results shared with other communicators so they can use what works and avoid what failed.
- **Focus groups:** Small groups of a dozen people or less can be used to gather a wide range of reactions to marketing efforts. The marketer should keep in mind, however, that focus groups are an art, not a science. The moderator should try to gather specific comments and suggestions but should work from a set of prepared questions. The session should be videotaped so that facial expressions and body language can be studied afterward. (Often, a person's words will be flatly contradicted by their body language.) The moderator can allow some leeway in the discussion, but questions should be taken from a carefully prepared list. Questions should funnel down from general queries to more and more specific probings. However, the moderator should not

"lead the witnesses" in any way. Care should also be taken in who is selected for the group.

- **Mail and telephone surveys:** Telephone surveys can collect specific information from a large number of people for a relevantly low cost. Mailed surveys, even with reply postage, generally have a much lower response rate. Mailed responses are also a "self-selecting" group, which can distort results.
- **Web traffic analysis:** Like direct response, Web traffic analysis provides a highly accurate, numerical measurement. Applications such as WebTrends provide multiple reports at different levels of detail. The number of visits (rather than hits) with vital information such as entrance and exit pages, time spent on each page, and total time spent on the Web site can provide clues to visitors' interests and understanding of the site. Navigation problems can also be sometimes uncovered by studying site traffic patterns.

Flying in Formation

At this point, you might ask why migrant ducks choose to fly in a V formation in the first place.

Naturalists believe that aside from indicating dominance (the lead birds are always female), the leader creates a turbulence wave that actually assists the birds behind it. The farther back you are in the formation, the less energy you need in the flight. Lead birds rotate to share the burden of "breaking trail" for the others. This V formation is extremely energy-efficient. Researchers have discovered that a flock of 25 birds in formation can fly 70 percent farther than a single bird using the same amount of energy. Stragglers who break out of the V pay a price in increased air friction and a higher energy cost. For this reason, the system is self-stabilizing—even young birds who have not migrated before quickly feel the advantages of flying in the V.

This is basically how marketing works, of course. Everyone's efforts are leveraged, so the corporation flies higher and farther than it could otherwise. And if properly maintained, the implementation becomes self-stabilizing. New employees are introduced to the accepted formats and quickly pick up the right messages, branding, and procedures, as well as the vital importance of compliance itself. If they decide to ignore guidelines altogether, their projects may not be approved, and they pay a "higher energy cost" in terms of revision and rework.

Marketing is never simple or easy. It requires a realistic commitment by management, starting with budgetary commitments. The majority of implementations fail to achieve their potential simply through a lack of resources. But by maintaining commitment at multiple levels, by building relationships, and by balancing the two aspects of local control and centralized management, the marketer can help enrich the corporation and all its efforts.

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