



2008 Fall Marketing Workshop

Tutorial Descriptions

Strategic Marketing Topics

3 HOUR TUTORIALS

A. Introduction to Marketing Strategy *(Basic/Review)*

William D. Neal, Senior Partner, SDR Consulting

- The development of customer-driven strategic planning
- The interface between strategic planning and strategic marketing
- Developing strategic marketing plans at the market and product level
- Information sources for supporting the strategic marketing process
- Processes and procedures for developing an effective strategic marketing plan
- Current management practices and how they fit

Benefits of Attending: Attendees will learn about the strategic planning process and the integration of marketing strategy and business strategy. We will provide a roadmap for developing a strategic marketing plan and discuss all of the elements in that plan. The take-away from this tutorial is that attendees will acquire an operational framework for developing an effective marketing strategy and learn how to develop a strategic marketing plan that fosters sustainable competitive advantage.

D. A Case in Developing Marketing Strategy *(Basic/Review)*

Michael K. Rich, Executive Director - Southwest Marketing Advisory Center & Professor of Marketing, Southwest Minnesota State University

Several actual marketing cases are explored and linked to various marketing tools to determine core strategic marketing components that were either ignored or misused in the actual cases. These components are analyzed to determine their application in other business environments. Attendees discuss specifics of their individual situations and compare possible changes that might have a positive impact on their marketing effort based on the concepts discussed during the case development. Interaction of the participants through discussion is key to the success of this tutorial.

Benefits of Attending: Attendees will gain the ability to logically analyze key marketing issues that confront all products and services. They will develop an approach to effectively target their product or service to a logical market segment that will maximize the return on their marketing investment.

I. Strategic New Product Development *(Best Practices)*

Robert Kincaide, Managing Director, The Hazelton Group

Solid new product strategy coupled with a well-run new product development process is the best way to create successful new products that work in the marketplace. This interactive session will focus on the following topics:

- Creating a new product strategy
- Building cross-functional teams to drive innovation
- Mastering the Discovery Phase in creating new product concepts
- Designing and managing a new product development/commercialization phases

Benefits of Attending: Participants will learn how to develop a successful strategy for creating new products, as well as how to implement that strategy using a stage-gate new product development process.

V. Pricing Strategy & Tactics – The 1% Solution *(Best Practices)*

Tim Matanovich, Vice President, Strategic Pricing & Value and "The Pricing Guy" TriZetto Group, Inc.

In most companies, a 1% improvement in price performance, that is \$1 on a \$100 sale, easily translates into a 10% to 20% bottom line improvement. And, in most companies getting that 1% is like shooting fish in a barrel. Moreover, many companies find that chasing that 1% yields them 4% or 5% for their trouble, with the corresponding bottom line impact.

What's the secret? In fact there are four:

- Watch the basket – Look at prices the way an accountant looks at costs
- Not all customers are created equal – So quit treating them that way
- Strategic pricing is value based – You either get it or you don't
- Sales is your best friend or worst enemy – It's your choice

Join Tim Matanovich, "The Pricing Guy" to capture the 1% that makes a difference.

W. Getting Google to Love Your Website *(Innovation)*

Brian Brown, Natural Search Consultant, Netconcepts

During this rich presentation, spanning Search Engine Optimization fundamentals as well as advanced tricks and tactics that only the elite SEO experts know, you'll learn how to...

- Check your "Google Pulse"
- Estimate missed opportunity costs
- Ensure Google crawls 100% of your site, including dynamic pages
- Design your pages to dominate rankings
- Avoid getting banned by Google
- Wield invaluable SEO tools you've not yet heard of
- Build high-quality links from trusted sites, and boost your PageRank along with your rankings
- Prepare for changes to come... and so much more!

Strategic Marketing Topics

2 HOUR TUTORIALS

C. Getting the Most Out of Online Research: Tips, Tools and Techniques *(Best Practices)*

Debra Semans, Senior Vice President, Polaris Marketing Research, Inc.

Online survey research is a great tool for marketers to use to learn what the market is thinking. But is online research the bargain everyone thinks it is? And how can non-researchers get the same results researchers get? When should you DIY and when should you let the pros handle it? Learn how to avoid the common pitfalls of online research and how to get actionable insight from your efforts. This presentation will give you the knowledge to make the most of online research.

I. The Good, The Blog And The Ugly! The Brave New World of Using Social Media as an Innovative Marketing Strategy *(Innovation)*

Toby L. Bloomberg, President, Bloomberg Marketing

Some call it social computing others call it social media. But whatever you call it, emerging technologies like blogs, podcasts and RSS have disrupted the status quo of traditional marketing. The marketing paradigm has gone from "controlling the brand message" to "managing the brand experience."

Marketers would be wise to heed the advice of Philip Kotler, when he said "Marketing is a learning game." Social media tactics like blogs, wikis, podcasts, RSS and mash-ups have changed the rules of the game. Your consumers know it. Peer-to-peer conversations are not only influencing the perception of your brands...they are impacting your ROI. However, learning the rules are not sufficient, marketers must understand how they can participate within a brave new culture.

This tutorial will provide an overview of how social media is impacting consumers' perceptions of brands. Through examples and case studies participants will develop an understanding of the risks and rewards of new tools such as blogs, podcasts and RSS. The session will explore how marketers can leverage shifts in consumer behavior to create stronger relationships and increased customer loyalty.

Measuring & Managing Customer Loyalty & Customer Commitment Topics

3 HOUR TUTORIALS

J. Measuring and Managing Customer Loyalty *(Basic/Review)*

Aldy Keene, Partner, The Loyalty Research Center

Customer satisfaction is dead. If your company is like most, you have experienced problems in improving customer satisfaction scores and are unable to establish a meaningful link between customer satisfaction scores and financial outcomes. Thousands of companies share this struggle. The good news is that there is a solution.

Attend this session to learn how to implement a world-class loyalty measurement and management program in your company or to simply make an existing program better. There are three key components to this session:

- Forming loyalty segments that are linked to profitability
- Analyzing those loyalty segments to ascertain critical differences and descriptors between them
- Making key changes in the organization to migrate customers from one loyalty segment to another

This session is applicable to both B2B and B2C environments and for both products and services. You will leave this session with:

- An overview of the most commonly used loyalty segmentation methodologies, along with their strengths and weaknesses
- The ability to choose the loyalty segmentation methodology that is best for your firm
- An understanding of the difference between customer satisfaction and customer loyalty
- Insight into the differences between loyalty segments – what makes one customer loyal and another vulnerable?
- Knowledge of the impact of customer experiences, including problem experiences, on customer loyalty
- Techniques on how to determine exactly what needs to be done in order to migrate customers from one loyalty segment to another
- An understanding of the financial impact of migrating customers into more favorable loyalty segments
- Other critical components that must be in place to generate heightened customer loyalty-communication and employee involvement

Benefits of Attending: This session will give you a clear understanding of how to move forward with measuring and managing customer loyalty. You will know the language, the commonly used techniques, and the pitfalls that will enable you to examine the design, measurement, analysis, decision-making, and implementation related to customer loyalty.

K. Building a Loyalty Program: The Best Tools, Techniques and Practices *(Best Practices)*

Bob Konsewicz, Senior Strategy Consultant, Maritz Inc., Loyalty Solutions & Design

This interactive and participatory session is designed for marketing professionals who are interested in building a best-in-class loyalty program for their end customers. The session will guide you through the step-by-step process of creating the marketing framework and structure for a program that will drive increased customer retention, migrate and grow profitable customers, encourage advocacy and deliver a positive ROI. Key topics include:

- The seven key components of well-planned loyalty programs
- Segmentation techniques and targeted marketing strategies for loyalty program members
- Engagement stages of loyalty program members
- Relevant communication strategies and channels for loyalty programs
- Designing loyalty programs around customer value
- Best-in-class programs in the marketplace
- Understanding and combating the loyalty program myths
- Selecting rewards, perks and incentives for the program
- Justifying loyalty program costs

Benefits of Attending: Participants will leave the session with the knowledge of how to design and structure a successful loyalty program. They will be armed with strategic tactics on how to use programs to drive customer retention, advocacy and growth, and be prepared to justify programs financially.

Measuring & Managing Customer Loyalty & Customer Commitment Topics

2 HOUR TUTORIALS

B. Marketing from the Inside Out: Engaging Employees for Strategic Advantage *(Best Practices)*

Sybil F. Stershic, President, Quality Service Marketing

It's no secret that customers judge your brand by how well they're treated by everyone in your organization they come in contact with. As a result, your best marketing efforts to promote your brand can be enhanced or undermined by employees. So how do you get employees to work with you rather than against you?

Learn how to take care of the people who most impact marketing and organizational success. More than just a 'feel good' session for taking care of employees, this session shares critical insights and examples from a variety of organizations on how to:

- Gain employee commitment
- Create and reinforce a customer-focused culture
- Strengthen employee-customer relationships.

Benefits of Attending: You'll learn the necessary framework and practical tools needed to apply a proactive internal marketing strategy to ensure marketing and organizational success.

H. Creating a Voice of the Customer Process That Integrates All Customer Touchpoints *(Best Practices)*

Marlene Yanovsky, Customer Focused Solutions

Most companies have a common problem. They collect huge quantities of data about their customers in many silos and have difficulty integrating and aggregating them to provide a total view of the customer. While companies recognize the need to provide voice of the customer information for decision-making, most organizations have not developed a methodology that enables them to do so.

This session will present an approach to designing an integrated voice of the customer process and demonstrate how to use and report the data for business decision-making. It will cover the design of customer feedback research to support the process, using the market intelligence that can be gathered from your sales force, the role of senior management in building relationships and gathering data.

Benefits of Attending: Participants will be able to design their own voice of the customer process or benchmark and enhance an existing approach.

O. Segmentation – A Guide to Actionability in Research's Third Rail *(Innovation)*

Bernard Brenner, Senior Vice President, TNS Custom Research

Research departments too often assume the responsibility for formulating and conducting segmentation research that fails to live up to its promise and potential. One could write volumes about research projects requiring significant resource investment that ultimately sat in a binder on a bookshelf. Segmentation is more than just pretty PowerPoint slides, in order to be effective it has to have considerable impact on organizational decision-making.

This tutorial addresses two major issues that can help you design and effectively use segmentation studies—(1) factors to consider during the design stage of a segmentation study and (2) factors designed to make segmentation operational within your company and your industry.

Benefits of Attending: The presenter will draw from years of experience in conducting segmentation studies to illustrate how you can use various tools and methods to optimize the return on investment in your next segmentation study.

Branding Topics

3 HOUR TUTORIALS

F. Building and Managing Your Brand as a Strategic Asset (Basic/Review)

Aaron Smith, Engagement Manager, Prophet

Successful companies recognize that strong brands and what they represent drive customer purchases, increased loyalty, and long-term business performance. Yet many companies fail to create powerful brands or are disappointed with the returns they get from brand building efforts. To address these issues, requires a thoughtful and strategic approach to managing a brand as an asset. In this tutorial, you will learn the importance of understanding the relationship between brand and business strategy, tips for establishing a unique position in the market, and how to make sure the entire organization is ready to execute the brand strategy. Key Topics:

- What successful brands have in common
- The benefits of successful branding
- The key tenets of a successful brand strategy and frameworks to helping you manage the process within your organization
- Perspectives for how to track the health of your brand and success of brand-building efforts
- Tips for how to jump-start brand strategy implementation efforts within your organization
- Interactive examples of how leading global companies have solved important branding issues

Benefits of Attending: Learn why your brand is a strategic asset; gain practical tools that can be used within your company immediately; determine how to measure your brand-building activities; and gain exposure to best practices in branding today from a variety of case studies from leading global companies.

Q. Kick-Start Brand Growth – Innovating on “White Space” Opportunities for Brand Repositioning/Renewal (Best Practices)

Robert Kincaide, Managing Director, The Hazelton Group

Learn how Dynamic Brand Platforms provide the right approach for sustainable growth. Explore the five phase method of discovery to create a growth platform.

Learn to apply the brand innovation process to generate faster brand growth for products, services or complete companies; make mature brands grow again; renew declining brands; find new growth opportunities. At the end of the tutorial, you will have a detailed process, brand worksheets plus application skills that can be applied to all your future brand building initiatives. It is an exciting brand growth tutorial that will benefit any marketing or brand professional.

Benefits of Attending:

- Processes and tools to kick-start brand growth
- Approach for creating a Dynamic Brand Platform
- Skills and organizational design for success
- Methods and worksheets to structure consumer insights into actionable growth solutions

R. Brand Measurement: Its Purpose, Potential and New Approaches (Best Practices)

Ron Strauss, President, Brandzone, LLC

Brand practitioners and marketers, ad agency personnel, media executives, etc. are under increasing pressure to express the value of brand-related investments using a context, language and format that is meaningful to senior management. Future program funding is at stake. This session is designed for those responsible for the brand development and maintenance process looking for new ways to demonstrate the value of brand investments. This includes the value to the organization of brand as the 'invisible hand' of management. Key topics:

- Why is brand measurement important?
- What is brand measurement? What is it not?
- Defining Brand Value and Brand Equity – why they're not the same
- Ways to measure Brand Value and Brand Equity
- Using brand metrics to accelerate value creation
- New ways to communicate the value of brand and branding

Benefits of Attending: What you learn at this session will give you insight into brand value metrics to be employed in demonstrating the total value of brand to top management. The workshop will apply some of these methods to 'real-life' examples drawn from the needs of the attendees – so that the session has immediate 'take-home value'.

Branding Topics

2 HOUR TUTORIALS

N. Living the Brand – The Dimensions of Internal Branding *(Best Practices)*

Eric Hutchinson, Partner, Acer Exchange, LLC

It's easy to understand that branding goes beyond the traditional marketing activities of advertising, logos and corporate identity. But where should you focus your limited resources to achieve the best results and the highest impact? The answer depends on how your brand is delivered to its audiences and where your internal branding leverage points are located. Learn how your company can align strategies and processes to deliver the strongest possible brand experience. This workshop will include the following topics:

- How brands are delivered
- Overlooked leverage points for internal branding
- Guidelines for internal branding
- Techniques to use in internal brand implementation

Benefits of Attending: Participants will take away tools to complete their own internal brand audits and models to develop effective internal branding plans that will drive the brand deep into the organization and culture.

G. Basics of Positioning for Building Brands *(Basic/Review)*

Eric Hutchinson, Partner, Acer Exchange, LLC

A strong position in the marketplace enhances the strength of your brand while giving consumers a reason to buy. So why do so few brands have a strong position? This tutorial provides a foundation of facts and tools to help you develop and implement a strong position in the marketplace. An interactive session with real-world examples, you will learn how to create and evaluate a strong, differentiated position for your brand, product or service.

Benefits of Attending: Participants in this tutorial will gain understanding, awareness and answers to the following questions:

- What are the key components of brand positioning?
- How do I develop a strong position?

Y. Consumer Generated Content: Impact on Branding, Strategies, and Marketplace

Relationships *(Innovation)*

Greg W. Marshall, Charles Harwood Professor of Marketing and Strategy, Rollins College

The world of Consumer Generated Content is evolving on a real-time basis and is now being considered by world-class marketers as a fundamental building block of strategy. For example, in a recent speech at the Association of National Advertisers (ANA) conference, Procter & Gamble CEO A.G. Lafley urged marketers to "let go" of their brands and bow to consumer wants and needs. His five major points are reflected in the list below and represent high priorities for discussion in the session:

- Always much more profound than ever before, the consumer runs the branding show and controls the messages
- Marketers now wholly operate in a "let-go world," where media fragmentation and the rise of consumer generated content have transformed the role of marketing and the CMO virtually in ways previously unimaginable
- The transition from a push- to a pull-driven marketplace is complete
- All of this is accelerating
- The brands most likely to succeed in the future are ones that are "in touch" with consumers

Benefits of Attending: This workshop session explores these issues and challenges attendees through interactive exercises and discussions to come to grips with the ramifications of the inexorable drive toward "consumer in control" on how strategic marketing is done in organizations.

Customer Information & Relationship Marketing Topics

3 HOUR TUTORIALS

M. Integrating CRM and Marketing Research to Improve Market Insight *(Best Practices)*

D. Randall Brandt, Ph.D., Vice President, Customer Experience & Loyalty, Maritz Research

In recent years, proponents of customer relationship management (CRM) have promised to help organizations become more effective by providing technology that makes integrated customer, product, and business information available on an immediate and uninterrupted basis. Armed with such technology, CRM proponents say, business managers and customer contact personnel can rapidly develop a single, comprehensive view of the customer that can be translated into increasingly profitable business efforts and processes.

Unfortunately, there is growing evidence that the reality of CRM has not kept pace with the promise. Part of the problem is that simply implementing CRM technology does not guarantee achievement of a CRM solution. This workshop will present a framework and tools for integrating CRM and marketing research in order to improve market insight and business results. Specifically, the workshop will:

- Provide an overview of key tools and techniques for integrating alternative sources of customer and market data
- Demonstrate how these same tools can be used to link customer and market data to other key operational and financial data and performance indicators
- Furnish case illustrations and actual applications of the above linkage framework and tools

Customer Information & Relationship Marketing Topics

2 HOUR TUTORIALS

U. Simulations: Testing Marketing & Media Tactics through Agent-Based Modeling *(Innovation)*

Damon Ragusa, Managing Director, ThinkVine LLC

Only the most leading-edge retailers and advertisers are doing it so far, but they think it will become a marketing staple: agent-based modeling (ABM) simulations—computer-based tools for helping marketers see how the initiatives they are considering will play out. Used until now to predict how hurricanes, epidemics and battles will unfold, ABM simulations are faster, cheaper and more versatile than today's testing methods—and proving more accurate in capturing the real complexities of your markets and consumers than traditional analytic techniques.

Learn how pioneering organizations are using ABM simulations to help test various media mixes—to foresee how their messages will spread and can yield the lowest possible cost-per-acquisition. Also, this tutorial will show how retailers are building electronic game boards to observe their consumer's reaction to marketing changes in order to improve their bottom line.

The implications for these types of simulated environments are boundless. For instance, this tutorial will touch on issues related to social networking, the psychology of influence and consumer adaptation. All of which will be grounded in real examples that have generated real ROI for Fortune 500 companies.

Sales Effectiveness Topics

3 HOUR TUTORIALS

S. Customer Message Management: Increasing the Impact of Marketing Support on Sales Effectiveness *(Best Practices)*

Tim Riesterer, CEO, Customer Message Management, LLC

Customer Message Management is for marketers looking to increase their impact on sales effectiveness. The AMA's CMM tutorial has created a definition and set of best practices for helping marketing departments create, deliver and manage more sales-ready, customer relevant messaging and collateral.

Key learning opportunities include:

- Avoiding "no brand's land" – drive consistent messaging and communications from the 30,000-foot level to the all-important 3.5 –foot level – your sales touchpoints
- Creating "messaging that matters" – create customer-centric messaging that enables value-based, selling conversations and communications
- Delivering "collateral that counts" – provide this messaging in the form of coaching and collateral outputs that align with the requirements of a consultative sales process

P. Executing a Customer-Driven Culture *(Best Practices)*

Greg W. Marshall, Charles Harwood Professor of Marketing and Strategy, Rollins College

In 2008, what firm doesn't want to lay claim to being "customer-centric"? Yet, in the B2B space evidence continues to reveal amazingly low levels of general satisfaction among customers with their buying experience. Vendor firms tend to throw resources at "relationship selling" initiatives as though a salesperson can somehow manage to make up for a variety of other deficiencies in offerings, people, processes, and systems. The estrangement between marketing and sales exacerbates the customer's frustration, as branding claims are much more easily made than met.

This session addresses and provides action steps for answering these critical questions:

- How can organizations better take the concept of customer-driven culture to implementation?
- What elements are necessary to consistently achieve a superior customer experience?
- Where are the areas of internal synergy required to make this happen?

Benefits of Attending: This workshop session explores these issues and challenges attendees through interactive exercises and discussions to yield important ideas for bringing a customer-driven culture into reality in your organization.

T. Competitive Affairs: Finding and Using Competitor Information to Improve Marketing and Increase Sales Revenue *(Best Practices)*

Matthew Kelly, Vice President Business Development, Strategy Software, Inc.

How do you track your competitors? Marketing leaders who don't use insights about competitors to hone marketing and create 'sales-ready' messages are leaving their company at a disadvantage. Do your sales people have the competitive information to answer the question: "Why should I buy your product/service, rather than (your competitor XYZ's product/service)?" Learn how to use competitive insights to improve the bottom-line (cut costs, increase sales). Framed by some theory, most of the session will be spent exploring practical "how to" ideas for gathering, managing and reporting competitor information. We'll discuss case studies of companies who have deliberate competitive affairs processes in place to outsmart competitors in measurable ways specific to sales, marketing and other areas.

Benefits of Attending: Identifying, monitoring, analyzing and applying information about competitors, major customer groups, substitute providers and other community 'influentials' is core to marketing. A significant benefit of attending is discovering how competitive assessment, if presented correctly, can be worth 24-carat gold to many critical areas of a company.