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ENGAGING MARKETING MINDS

MARCH/APRIL 2022



# CUSTOMER-CENTRIC SEGMENTATION

BUILDING ENGAGEMENT WITH PERSONALIZATION

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## TWO FOR THE PRICE OF ONE

It is amazing how productive we all are these days. Because we have eliminated the morning commute, business trips, and most of our in-person meetings, we have more time to produce. In turn, we are Zooming hour after hour and pumping out PowerPoint presentations in a conveyor-belt manner. We are getting an incredible amount of stuff done and the numbers validate it. At the beginning of the pandemic, Goldman Sachs predicted that productivity growth rates would increase by .5% each year through 2022.

Despite the fact that some might say that production is all that matters, creativity needs to be at the top of our New Year's resolution list. At a time when travel is a memory, long-winded meetings at the office have disappeared, and we have more time than ever at home, creativity seems to have taken a nosedive. Today we fill every silent moment with "productive screen time." And while this already was the case on the way to the airport, or waiting in the airport lounge, now it occurs as we sit in the comfort of our own homes.

It is time for us to rescue our creative minds by allowing boredom to live. It is the cornerstone to creativity and provides the platform for reflection. In other words, if we choose to endure boredom, we can be more creative than ever.

And while we all look for some of that quiet time, we may also want to find time to reconnect ourselves with others. As screens replaced face-to-face meetings and water-cooler talk disappeared, all of the moments that the CFO deemed "unproductive" vanished. Our overly productive Zoom culture has left us multitasking at such a dizzying rate that we are missing the opportunity of being with others. Our wish for you this year is to find some time to disconnect from the digital handcuffs long enough so that we might engage in the kind of real human interaction that wakes up our brains.

Those officially unproductive pauses, those stimulating thoughts, those creative connections, those moments benefiting from a carefully created company culture—all have been lost in the digital haystack. We can, however, find a better version of ourselves in 2022 by finding moments of quiet reflection and casual interaction with others. And we can still get a lot of work done!

Enjoy the first issue of what is going to be a wonderful year!

Warmest wishes,

Gina M. Danner, CEO



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### CREATIVITY NEEDS TO BE AT THE TOP OF OUR NEW YEAR'S RESOLUTION LIST.

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# CUSTOMER-CENTRIC SEGMENTATION

## Building Engagement with Personalization

**M**atthew Vernhout believes a brand must exercise a sense of balance when building and sustaining a relationship with its community. One of the driving tenets in community building is creating a positive bond within the marketplace. That positiveness can be achieved through having the right mix of personalization. Too much personalization can seem like an invasion of privacy and border on creepiness, while not enough and the community is left feeling like the message is too generic and not relevant.

Vernhout, VP of Deliverability for industry-leading multichannel marketing technology company Netcore Cloud, spends his days driving the company's industry-defining standards of email deliverability, privacy, compliance and consulting practices. With nearly two decades of experience, he understands the importance of delivering messages that are relevant to the community you are trying to build. He knows that building that affectionate segmentation matters.

"Personalized messages can be extremely simple or complex—each has advantages and drawbacks," Vernhout says. "Simple examples could be reformatting a message's layout to showcase it better or creative ways to grab consumer eyeballs. For a publisher, it could be as simple as placing it as the first story in your messages as part of the most read section by that user (e.g., sports, business). An airline could collect the top five locations a recipient plans to travel to and send weekly pricing and deals focused on that individual's destination wish list or tailor a message to promote an upcoming destination."

In the end, the goal is simple: to become a reliable source for relevant information to the recipient and prove that your messaging provides the best experience to the end user and builds a relationship over time that makes your brand part of an individual's daily routine. As a marketer, Vernhout says some of the best feedback is when your customer notices your messages are missing from their inbox. "Whether it has been delayed, you skipped a day or it failed to deliver, hearing your consumer ask, 'Where's my message?' is a ringing endorsement of the trust you've built with your consumers."

In the highly competitive higher education landscape, building a community of prospective and existing students means striking a balance between offering a curriculum that can help meet personal goals while showing how a school cares about the students personally.

Shelly Heinrich, Associate Dean, MBA and MS-ESM Admissions, and Director of Marketing at the Georgetown University McDonough School of Business, says crafting that kind of personalization is critical. "There are many choices for graduate degrees from well-established institutions. There is also so much information out there that we receive from customers telling us their desired outcomes of a graduate

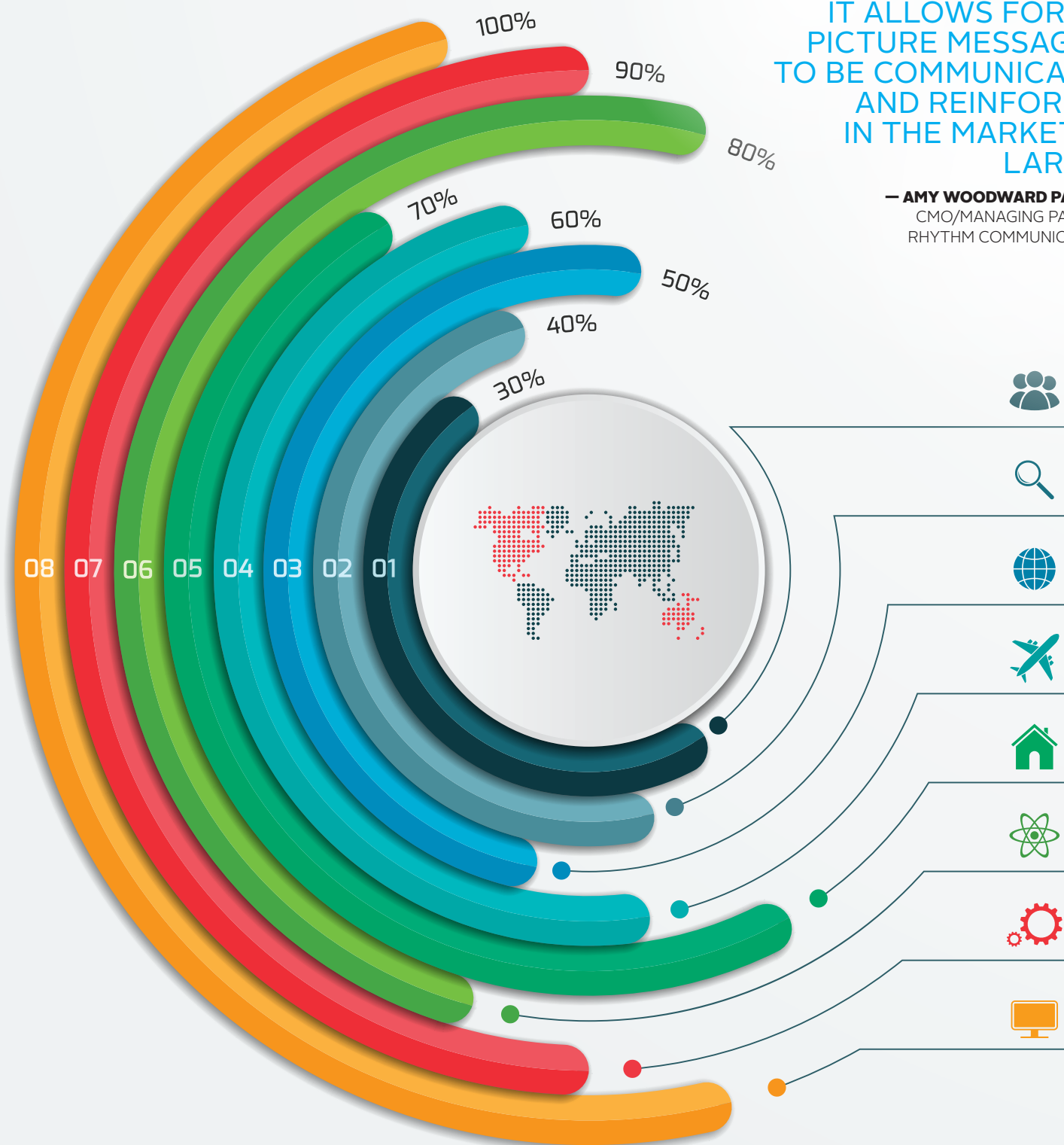
**"PERSONALIZED MESSAGES  
CAN BE EXTREMELY SIMPLE  
OR COMPLEX—EACH  
HAS ADVANTAGES AND  
DRAWBACKS."**

**— MATTHEW VERNHOUT,**  
VP/DELIVERABILITY, NETCORE CLOUD



PERSONALIZATION MATTERS MORE TODAY THAN EVER. IT ALLOWS FOR BIG PICTURE MESSAGING TO BE COMMUNICATED AND REINFORCED IN THE MARKET AT LARGE.”

— AMY WOODWARD PARRISH, CMO/MANAGING PARTNER, RHYTHM COMMUNICATIONS



management degree. So, if we can tailor our communication to people, we show that we care about them individually—that they aren't just another student—that builds trust with them.”

Similar to the way any brand approaches the process, Georgetown University sets out to learn a student's interests and affiliations (post-MBA, affinity and social). Next, it sends an email tailored to this interest showcasing the various opportunities the school has (clubs, events, scholarships). The move helps facilitate a connection with a student, alumni or McDonough staff member working with that curricular/co-curricular area of interest. The final step is to extend an invitation to relevant events.

“There are so many different opportunities that one can participate in within an MBA degree program,” Heinrich says. “There are multiple electives, career paths, and co-curricular opportunities. If we know someone is interested in a certain career path, we can tailor our marketing efforts to them by segmented emails about opportunities within their career path. We can have students or alumni from their intended degree or area connect with them and we can also create and tailor events just for their interests.”

### GOING BIG + PERSONALIZATION = SUCCESS

After a number of trial and error campaigns for a specific services client, Rhythm Communications decided to hire a data analyst to help refine its market pitch to a much more narrow segment. But CMO and Managing Partner Amy Woodward Parrish had some reservations. She was concerned it would limit their opportunity.

After 12 months of focused efforts, what Parrish and her team discovered was electrifying. The program not only delivered personalized service features to a narrowed segment, but also demonstrated that the brand (and Rhythm Communications) had a better understanding of the consumer's needs. Even better, the client's revenues grew by 75%.

Today, as part of its planning efforts with each client, the Rhythm Communications'

team begins each conversation with data analytics and partners with data analysts to dive even deeper—information like where they live, what they read, what they watch and what they purchase. When you are able to acquire that kind of data, Parrish says you can develop relevant visual, verbal and written messaging—campaigns that can help leverage two or more traditional marketing channels that deliver the personalized campaign elements that bring it home for the individual consumer.

“We believe in the power of personalization, especially employing an integrated traditional marketing strategy through public relations, direct marketing and digital advertising, overlaid by a one-to-one marketing strategy,” Parrish says.

And it is no wonder. Today's consumers are becoming more attached to products or experiences that are created specifically for them. According to Twilio Segment's “The State of Personalization” report, brands can choose between two options: personalize or perish. In the wake of the pandemic, digital technology has set new expectations and realities. Businesses must adapt, or customers will walk away and support their competition.

The report says that while offering personalized digital experiences used to be a nice-to-have, they now are essential. Both brands and consumers agree, with 75% of brands emphasizing personalization as table stakes, while more than half of consumers saying personalization improves the customer experience.

“Personalization matters more today than ever,” Parrish says. “It allows for big picture messaging to be communicated and reinforced in the market at large, then tailored per consumer to make the messaging personal to one's needs/wants. Surprisingly, this mix allows for more manageable budgets for overall campaigns because they are more effective and require less time for impact.”

In the end, building that bond with your customers—and finding more and more ways to strengthen your relationship—is critical in a landscape where people find trust and support in communities.■



## YOUR 5-STEP PLAN TO PERSONALIZING YOUR MESSAGING

The personalization requires starting simple and testing, and then iterating and building on your program's complexity. Matthew Vernhout, VP of Deliverability for Netcore Cloud, says part of building a robust personalized experience for users is determining what you want to accomplish with personalization and the data required to make that a reality. For example, adding the local weather to your messages requires knowing where the consumer is, just like sending a birthday message needs for you to know the date. Here's a 5-step plan to get you started:

- ▶ **STEP 1:** Identify your goal and purpose of personalization (hypothesis)
- ▶ **STEP 2:** Do you have the data required, or know how will you collect the data?
- ▶ **STEP 3:** Introduce personalization into your messaging
- ▶ **STEP 4:** Measure for changes, adjust and re-measure
- ▶ **STEP 5:** Iterate, repeat with another personalization data point





# ONE EYE OPEN

## USING COMPETITIVE RECON TO YOUR ADVANTAGE

After researching the fintech space for a client project, the JOTO PR Disruptors™ team discovered there was little news or buzz about the issues the audience was facing based on what its client did in its main verticals of automotive, hospitality and government. The competition, it seemed, was not exploiting this. Neither was its client. Yet, as Karla Jo Helms, founder and Chief Evangelist at JOTO PR, discovered, all of the research pointed to the industry needing to know who the thought leader was for rapid digitization in fintech and how COVID-consumer demand was driving matters of speed, cost-savings and even issues of security.

The solutions the client offered solved all of these issues. They even solved other issues of scalability—another pain point the client did not know to what extent. As Helms recalls, there was a wide-open opportunity to make the topic of “conversational commerce” and “message-based payments” synonymous with her client. No competitor was claiming that position.

“The client’s technology was on the forefront of many changes in e-commerce, forced in part by the pandemic, and definitely becoming permanent,” Helms says. “With several layers of target audiences, the reconnaissance showed the major gaps

with their bigger competitors’ targeting, and uncovered their strategy, which was void of speaking of the newest trends and changes changing the industry.”

The discovery turned out to be a major coup for JOTO’s client, enabling it to be the first to market with this messaging/position, and thereby dominating the news channels where their decision makers were researching to find solutions to their problems. The client’s marketing personnel end up assuming the reconnaissance, and further finding the gaps in the marketing content and advertising channels.

When it comes to competitive recon, the approach is simple, but effective. After learning more about your ideal customer, you must take a closer look at how your competition is going after them. This means taking a deep dive into how your competition markets itself. Conducting this research will help you figure out what they’re doing well, pinpoint gaps in their strategies, and determine how you can take advantage of these with future marketing initiatives.

“In the court of public opinion, you need to know what your competitors are doing, or not doing, that your prospective buyers perceive as being good, bad, etc.,” Helms says. “The court of public opinion rules, meaning

‘perception rules.’ But if you don’t know all the ins and outs of determining how your competition is swaying public opinion on a broad—or even a micro—scale, you will not see the real opportunities.”

Sadly, as Helms and other marketers will attest, this scenario unfortunately is way too common. Most marketers do not understand how to glean the actual strategy a competitor is operating off of—or lack of one—to be able to see their own opportunities or barriers. What marketers like Helms continue to see is that they connect with competitors and see what they are putting out in terms of content or messaging—or even traffic—and try to emulate their competitors in that regard.

“This only serves to continue to market the industry instead of how they are different or their competitive advantage,” says Helms. “That is why you see so many companies saying nearly the same thing. And, in essence, they are mucking up their own USP (unique selling proposition) by saying the same thing everyone else is saying. That too, is unfortunately very prevalent.”

### Getting above the noise

In today’s marketplace, where everyone is assaulted with texts, notifications, “community” SMS services, and a variety



“ IN THE COURT OF PUBLIC OPINION, YOU NEED TO KNOW WHAT YOUR COMPETITORS ARE DOING, OR NOT DOING, THAT YOUR PROSPECTIVE BUYERS PERCEIVE AS BEING GOOD, BAD, ETC.”

— KARLA JO HELMS, FOUNDER/CHIEF EVANGELIST, JOTO PR DISRUPTORS™

of things that make sure we don't miss out on the latest viral thing, it is way too easy to get drowned out in all the noise. All you have to do is Google some service or product and you will get 1.89 million results in .095 seconds.

That's why David Brier believes it is absolutely imperative that you know the amount of "noise" your brand is competing against when you enter the

fray. The Fast Company blogger and founder of DBI International has made a career out of understanding that noise. Through the years, the award-winning veteran has earned 330-plus international industry recognitions for his branding, rebrands, design and brand strategy efforts.

"I see some marketers doing outdated forms of market research such as

sloppy focus groups where there's too much cross-contamination of feedback for it to be useful," Brier says. "Others operate on their 'spidey senses' and 'gut instinct,' despite factors that would be warning signs to the observant branding pro. Right now, there are way more marketing folks I see failing at doing intelligent homework to unearth useful insights."

The rules are pretty straightforward. Brier says your playbook should involve the following: defining your competitors, both direct and indirect; specifically defining your audience; examining how your audience solves its problems; and finding the common traits among your competitors, and striving to do things differently.

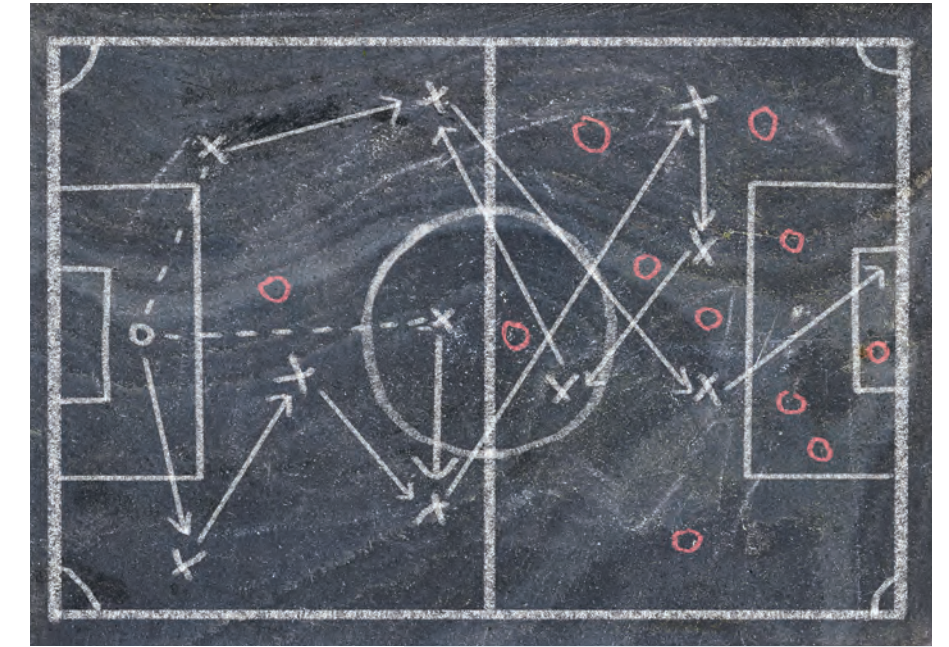
"Different is better than better," Brier says.

In its competitive recon missions, the Harvest Group conducts an extensive business assessment process with each client. As part of that assessment, the Harvest team asks a series of specific questions regarding the competition. By the time it is finished, Jud Griggs, Design/Build Sales and Marketing Consultant, says its clients not only have a much better understanding of the competition, but know how to best compete with them, too.

"Marketers should be looking for new competitors to the market," Griggs says. "They should also be looking for things they are doing better or different than they are. Once those things are learned, you can develop a strategy of how to incorporate them into what you are doing and enhance the services you provide."

Griggs says that too often, it is easy for brands to get into a comfort zone and continue to do what has always been done. But the if-it-ain't-broke-don't-fix-it strategy is not always the best one. "It is better to be ahead of the curve and look for unique ways to improve your customer's position in the marketplace in order to stay ahead of the competition. As the old adage says, 'Keep your friends close, and your enemies closer.' Competitors do not have to be enemies, but it is important to keep tabs on them. That means not falling too far behind them. Consumer's preferences change quickly, and you need to react to those changes before your competition beats you to it."

In a time of constant change, knowing when, how and where your competitor's next move is will be vital to staying in the game.



“ IT IS BETTER TO BE AHEAD OF THE CURVE AND LOOK FOR UNIQUE WAYS TO IMPROVE YOUR CUSTOMER'S POSITION IN THE MARKETPLACE IN ORDER TO STAY AHEAD OF THE COMPETITION.”

— JUD GRIGGS, DESIGN/BUILD SALES & MARKETING CONSULTANT, HARVEST GROUP



### Your 7-step process to competitive recon bliss

- 01 Research how top competitors position themselves in front of their target market, and how (note: this is not marketing)
- 02 Research the state of the industry and zones of PR control client needs to dominate public opinion versus where they dominate (this is a percentage)
- 03 Research the knowledge, or lack of knowledge, third-party credibility channels have about the company
- 04 Mathematically determine optimal public opinion awareness of the company to the existing public opinion awareness of the company
- 05 Determine the algorithm needed for PR & Marketing to change people's views toward the company
- 06 Determine the third-party credibility channels and key influencers needed to reach the target audiences per that algorithm
- 07 Determine the content needed to convince credibility channels and key influencers to carry their messaging to the company's target audiences

Source: JOTO PR Disruptors™



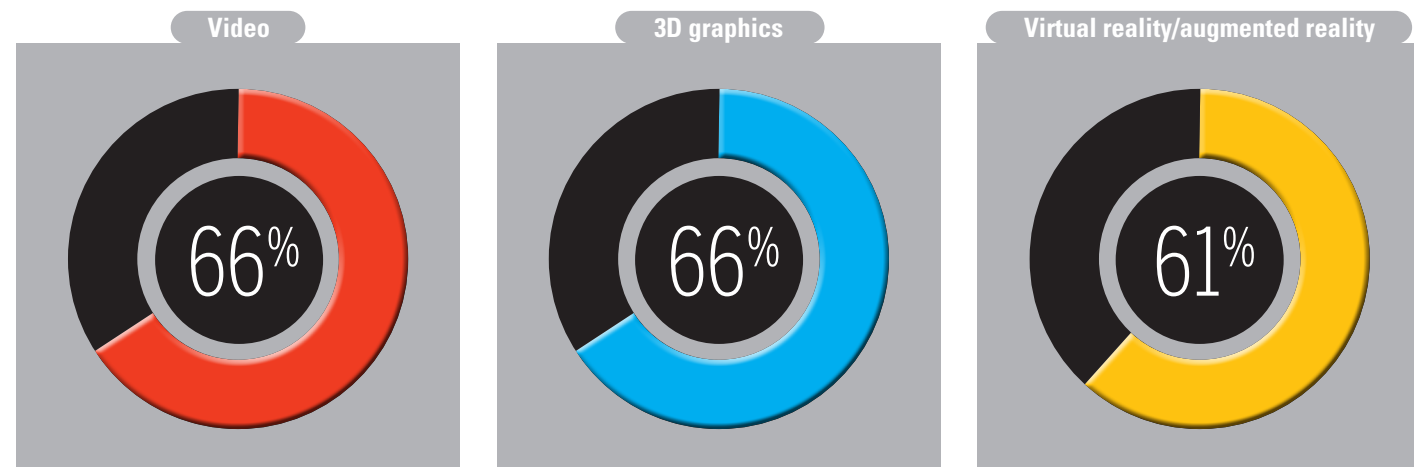
# TACTICS



## DIGITIZED

### REPORT SHOWS RISING TYPES OF DIGITAL CONTENT

It's not only younger generations that have their eyes glued to electronics—all generations are consuming more digital content than ever before. Brands are turning to new content types to stand out and meet customers where they are. Adobe's "Future of Marketing Research Series: U.S. Highlights" reveals what brands plan to incorporate into their marketing efforts over the next 12-18 months:



## 8 DESIGN TRENDS FOR 2022

From postcards to signage to web design, change is here. See what trends Venngage Inc. says will be the latest and greatest this year:

### Inclusive visuals

Diversity, equity and inclusion is redefining how brands approach representation in their marketing strategies.

### Fun data visualizations

Easy-to-read infographics, charts and graphs will continue to be the preferred way to share complex data.

### Bold backgrounds

Bright and colorful backgrounds, paired with lighter text, marks a shift from the previous years' muted palettes.

### Serif fonts

Stylish and classic fonts made a comeback in 2021 and are here to stay.

### Colorful icons and illustrations

Vibrant images on bold backgrounds create an eye-catching and engaging contrast.

### Branded memes

Make a meme your own for a light-hearted way to engage clients.

### Quotes

Words aimed to educate, rather than blindly inspire, are trending.

### Social screencaps

Sharing screenshots of tweets is a great way to share information across platforms.



## BIGGER FISH TO FRY

MARKETERS LESS CONCERNED WITH EFFECTS OF THE PANDEMIC

# 13%

OF SMALL BUSINESS MARKETERS CITE COVID-19 DISRUPTION AS THEIR BIGGEST CHALLENGE, SHOWING THAT THE PANDEMIC'S IMPACT IS EASING UP. MARKETERS ARE MORE FOCUSED ON INCREASING SALES, WITH OVER HALF (56%) CITING THAT AS THEIR MAIN GOAL FOR 2022.

Source: Taradel's "2022 Small Business Marketing" survey



# QA

## PRESIDENT, VISIONEDGE MARKETING LAURA PATTERSON

BEST-SELLING AUTHOR ON ACCELERATING  
YOUR GROWTH STRATEGY



### How should marketers change their thinking around organic growth in the new landscape?

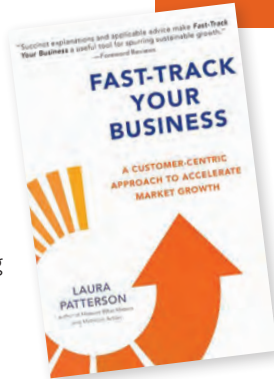
Organic growth has always been a do or die for every company. Due to the current landscape, most businesses are reassessing their growth strategies. Profitable and sustainable growth is only achieved when a company fully understands its existing and prospective markets and customers so well that they can deliver something of value to them—better and more quickly than their competition. This requires being even better at upstream marketing.

Upstream marketing, as defined by Dr. Ram Charan, is “the strategic process of identifying and fulfilling customer needs.” And we would add, quantifying existing and prospective customers in a market, or the number of existing customers using a particular solution. To achieve this, the marketing organization and every function across the company needs to be even more customer-centric—focused on problems that need solving or opportunities that need addressing—as well as market-centric.

### Can you speak to the power of a metrics-driven marketing practice and why it matters so much in the current landscape?

Every function within an organization needs to care about performance management. Performance management is about accountability and alignment, and requires being grounded in measurement and process, which in turn enables improvement. Marketing organizations measure many things.

Laura Patterson is a growth strategy consultant to business leaders. Obsessed with helping companies take a customer-centric approach to growth and to making business decisions with more confidence, Patterson is a trusted advisor with global customers within the technology, financial services, life sciences, and manufacturing industries. She co-founded VisionEdge Marketing in 1999, serving customers like Cisco, Elsevier, Howden, Kennametal, Tektronix, Southwest Airlines Cargo, and over 200 more worldwide. Her latest book, “Fast-Track Your Business: A Customer-Centric Approach to Accelerate Market Growth” shares how to develop profitable growth strategies for customers. We sat with her to find out her thoughts on growth in the current environment.



Whether that’s activity, such as number of events held, or output, such as open rate and response rates, or better measures tied to business results or outcomes. The key is to measure what matters to the business. That requires the marketing team to have business acumen, to know the business results they are expected to impact, and how their contribution beyond ROI will be measured. For example, the number of conversations with qualified new prospects created for the sales team and the rate of adoption of a newly launched product by existing customers. If, as a marketing organization, you want to be relevant, credible, and influential, then the right measures and timely reporting of these matters.

### Can you share with us how the “Circle of Traction” helps drive organic growth?

More and more, companies are competing on customer experience, versus solely on products and services.

The proven Circle of Traction includes 11 upstream growth components which together, provide a holistic approach to improving customer-centricity:

- Internally, across all functions, strategies for expanding within existing, and into new markets, planning, processes, operational excellence, people and skills, technology, data and analytics, and culture and leadership style.
- Externally, the right and consistent messaging, and at the right time across all channels, the customer journey and overall experience, touchpoints and processes, including those of partners within the ecosystem. The sum of the customer experience.

### Can you identify some of the changes that stand out since you wrote the book? And can you talk a bit about what changes might be sustainable over time?

While “Fast-Track Your Business: A Customer-Centric Approach to Accelerate Market Growth” is a new book, for 20+ years, we’ve been developing profitable growth strategies for our customers, based on the

framework described in the book. It has withstood the test of time. Organizations of any size, in any industry, at any time would benefit from the application of this customer-centric growth framework.

Since I wrote the book, the proliferation of market-related data and technology has accelerated at nearly non-manageable rates. Being able to see the right patterns, turn data into intelligence, then glean meaningful insights, will not be solved with more technology. We will need more people who embrace data and excel at critical thinking. These people need the right culture to thrive. Our most recent, executive level, global research focused on whether culture and leadership style

make a difference in the emergence of best-in-class marketing organizations. The answer is, yes it does. By the end of January, we expect to publish the study findings, including the optimum culture/ leadership combination for a high performing marketing organization.

### What advice do you have for both someone stepping into marketing and those who are veteran marketers?

For both new marketers and veterans, don’t get bogged down in the weeds of downstream marketing activities, like email campaigns, advertising, and social media. Be business people first, marketers second. Develop business

acumen, learn how other functions within the company work together to achieve growth goals. Success is not a solo act.

For someone stepping into marketing, look for, and join, a customer-centric company. These companies will be the most successful and everyone wants to be, and work with, winners. Find a mentor, build a community/network to connect with veterans. They can help you come up to speed quickly and to become more valuable.

For veterans, help build the future, be a mentor, share your knowledge of the craft, company culture and priorities. First-timers may bring new skill sets, and with fresh eyes they may bring new ideas to light that can improve overall results.





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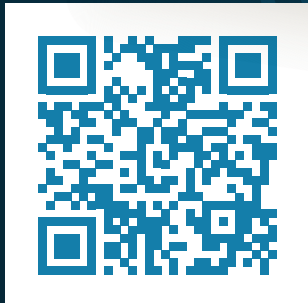
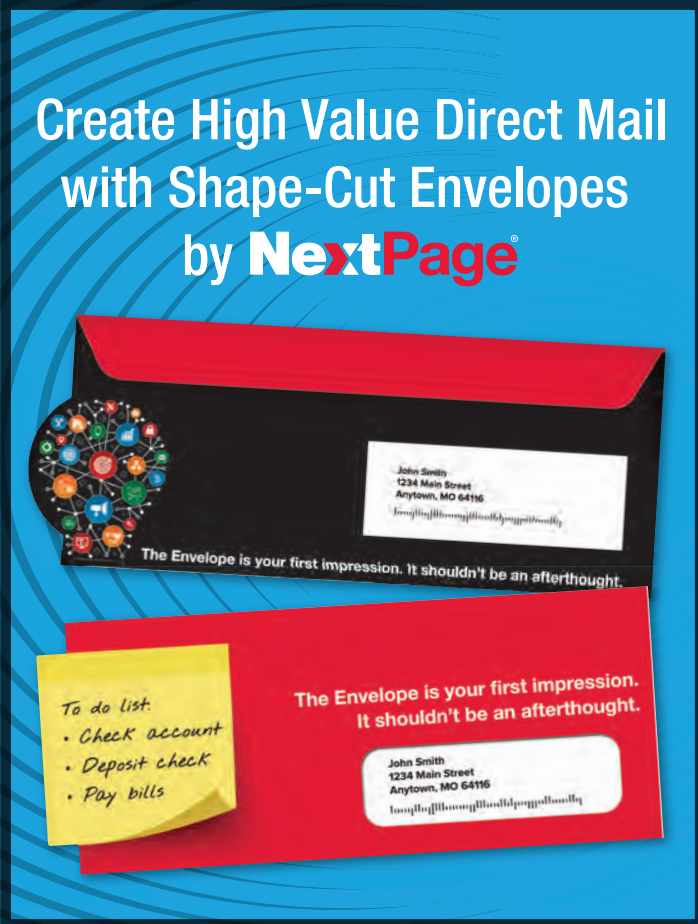


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