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ENGAGING MARKETING MINDS

MAY / JUNE 2024



NEW DYNAMICS

MANAGING
REMOTE WORK
IN MARKETING



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HEED THE CALL

The call for innovation has never been louder. Clearly, we are in the midst of another significant shift within marketing, driven by the emergence of AI. Contrary to the notion that artificial intelligence targets manual labor, it is knowledge work that is primarily being disrupted. It appears imperative for marketers to not only adapt but also lead the charge in redefining the boundaries of our profession.

This is not a time for stagnation or avoidance of change. According to OpenAI, more than 80% of marketers are utilizing ChatGPT to bolster their efforts. The impact has already been made and its effects will be lasting. Thus, we can no longer rely on conventional thinking to guide us. It is time to adopt an entrepreneurial mindset in marketing.

Many will be captivated by the remarkable capabilities of AI, which can deliver astounding results almost instantaneously. However, if it does not bring you closer to your community, it merely acts as a form of self-sabotage. A willingness to experiment, coupled with a commitment to engagement, is the formula for deeper connections. One without the other leads to a dead end.

Marketers exist to serve the market. Your primary focus should be on those you aim to serve. Consequently, any technology that enables us to better connect with and listen to our audience is invaluable. While innovation unfolds, our hope is that it provides you the opportunity to create campaigns that resonate more deeply and connect in ways previously unimaginable. This entrepreneurial approach to marketing is not just advantageous, it is crucial for survival and growth.

Artificial intelligence (AI) can be a formidable ally. With its ability to analyze data, predict trends, and personalize customer experiences, AI equips us with tools that once belonged in the realm of science fiction. Yet, despite AI's power, it acts as a support system, not a substitute for the human element that is central to all truly engaging marketing efforts. The technology is here to enhance our creativity, not to diminish it.

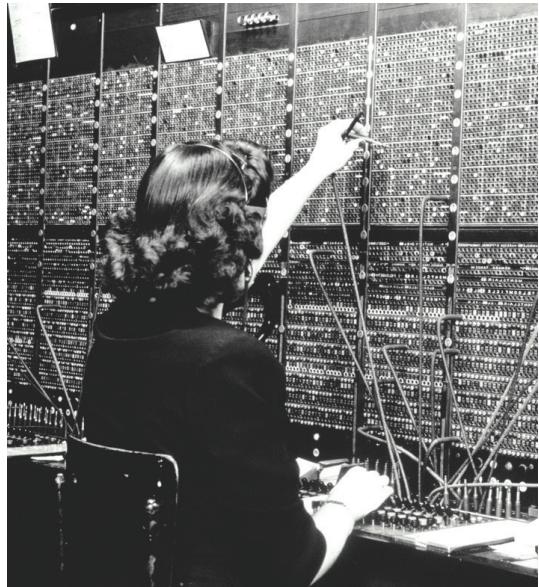
In this issue, we explore several ways to foster closer connections with both your customers and your team. Our cover story, "New Dynamics, Managing Remote Work in Marketing," offers insights into how the rise of remote work has transformed team dynamics. Additionally, in our feature, "Revolutionizing Small Business Marketing: The Power of AI and Automation," we discuss how artificial intelligence can transform print marketing, from personalized content to optimized distribution strategies.

As long as we keep our clients at the forefront of our minds, we stand on the cusp of something truly extraordinary.

Warmest wishes,



Gina Danner
CEO



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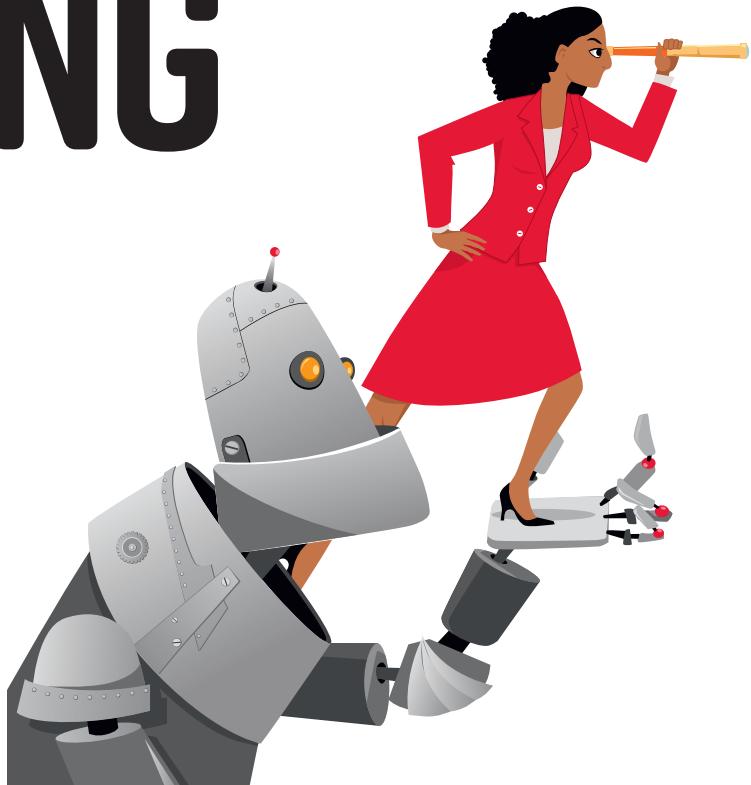
REVOLUTIONIZING SMALL BUSINESS MARKETING

THE POWER OF AI AND AUTOMATION

Small businesses are not afraid. Are you kidding? When it comes to artificial intelligence (AI), the platform is not only top of mind, it is helping them get on top of their games. Take Ganter's "Generative AI in Marketing" study, which shows that 48% report their organizations already are using generative AI in some part of their marketing funnel, with an additional 43% saying that while they are not using it yet, they plan to. Just 6% say they are not using AI and won't start.

Scott Barnick is one of those small business owners. OtterPR, one of the companies he co-founded, recently created a chatbot through its knowledge base that is designed to handle email responses. Before AI, the nationally recognized PR agency was manually fielding hundreds of incoming requests a day—some of which featured extremely complex questions. One email alone would include at least seven to eight questions.

The system in its current form made it hard for the OtterPR team to respond, mainly because nobody can be a true expert in every field. Barnick decided to consolidate a custom



“WHEN YOU ENLIST THE EXPERTISE OF A SPECIALIST IN AI AND AUTOMATION, THE VALUE CANNOT BE OVERSTATED. THE FIRST CHALLENGE IS FIGURING OUT WHAT YOU CAN AUTOMATE AND IS IT POSSIBLE.”

— CASEY JONES, FOUNDER/HEAD OF MARKETING & FINANCE, CJ&CO

email every time, meaning it created a folder in its Google account and if someone asked a question from the folder, it would automatically send the information to AI. In turn, AI would draft an email, save it as a draft, and within a couple of seconds the staffer could see it populate the draft.

"Through AI, we could read through the email, make sure it made sense and that it answered every question correctly, and then just hit send," says Barnick, who along with also being the bestselling author of the "Seven-Day Startup," has been featured in *Forbes*, *Entrepreneur*, *IBTimes*, *Yahoo*, and others.

The chatbot is just one of the AI workflows the OtterPR team is using on a day-to-day basis. Barnick says there are hundreds of ways AI can help small business marketing teams stay efficient and effective.

When it comes to the day-to-day grind of the job, the more hands—actual or AI-generated—the better, especially for small businesses. According to the U.S. Chamber of Commerce's "Empowering Small Business: The Impact of Technology on U.S. Small Business" report, 95% of small businesses use at least one technology platform, with high-tech usage correlating with growth in sales, employment and profits. In addition, 87% report increased efficiency due to technology platforms.

For many small business owners working with AI and marketing automation, the aforementioned statistics are no longer hypothetical. According to Constant Contact's "Small Business Now" report, 91% of small businesses that use AI say it is helping them save time and work more efficiently.

Along with using technology like generative AI in their marketing funnels (see sidebar, "It's an AI Marketing Thing"), many small business owners say AI will be ubiquitous on their teams within four years in everything from marketing campaigns, customer service, onboarding and client retention.

"The AI part of it is that people are still trying to figure out exactly how to use it," Barnick says. "For us, it is a chatbot where people can ask questions. It's also a sales tool, in which we are training our sales and customer service teams on how to access the knowledge base through the chatbot so that they have the same information."

FROM THE TOP...

Casey Jones, founder and head of Marketing & Finance at CJ&CO, says that when it comes to AI in the workplace, small businesses should concentrate on two fundamental aspects: automation and augmentation. Automation represents the pinnacle that numerous business owners aspire to achieve, allowing certain processes within the business to operate independently through AI and automation.

On the other hand, augmentation involves employees working alongside automated systems to enhance both efficiency and the quality of output. "The cornerstone of effective automation lies in the quality and cleanliness of data, a prerequisite that becomes even more critical when AI is also being integrated into the mix," says Jones, whose company helps small businesses in more than 120 countries.

As Jones tells her clients, the opportunities to find the right way for AI to make a difference are endless. For example, leveraging the ChatGPT API in tandem with automation tools like Zapier can revolutionize the way your business operates, automating roles that traditionally cost \$50,000-\$70,000 per year in salaries for (literally) dollars per month.





Other ways marketers can boost profits while reducing expenses include things like:

AUTOMATED GOOGLE REVIEW RESPONDER – The tool autonomously responds to all Google Business Profile reviews, ensuring consistent engagement.

AUTOMATED RECEPTIONIST – Ideal for businesses overwhelmed by lead volume, the solution significantly enhances time efficiency, cost savings, and customer satisfaction.

AUTOMATED QUOTING – Converts user-provided information into actionable data for automated, precise quoting, followed by seamless invoice or order generation.

Jones says that the Automated Receptionist platform helped a CJ&CO client to save \$70,000 annually while eliminating slow-response-related negative reviews, thereby boosting client satisfaction and client profitability. "The automated AI receptionist was evaluated for

THE AI PART OF IT IS THAT PEOPLE ARE STILL TRYING TO FIGURE OUT EXACTLY HOW TO USE IT."

— SCOTT BARNICK, CO-FOUNDER, OTTERPR

helpfulness and accuracy, and was more accurate than a human counterpart. Also, it doesn't take sick days."

The main thrust of AI and automation in the workplace centers on helping streamline operations, something Jones says small business marketing teams must embrace. "Primarily, when you enlist the expertise of a specialist in AI and automation, the value cannot be overstated. The first challenge is figuring out what you can automate and is it possible."

The blueprint is as easy as it is effective. Start by finding the right automation agency. Jones recommends reaching out to an automation expert to see if they've completed a similar project in the past. This can save you lots of time and money, as opposed to starting from scratch. Next, be willing to

fail. "Sometimes, you just have to give it a go and see how the automation works in a real-life setting."

In a time when automation is all the rage, if you're thinking of automating your processes via AI and automation, you may already be ahead of the game. By harnessing their capabilities, you will be on the cusp of a transformative shift in the way you compete in today's increasingly digital marketplace. ■

IT'S AN AI MARKETING THING

HERE'S A SNAPSHOT OF HOW SMALL BUSINESS MARKETERS ARE USING ARTIFICIAL INTELLIGENCE (AI) AND GENERATIVE AI TO STREAMLINE THEIR PROCESSES:

76%
► CONTENT MARKETING

43%
► PRODUCT MARKETING

37%
► CUSTOMER EXPERIENCE

36%
► LEAD GENERATION

31%
► ADVERTISING

SOURCE: GANTER'S "GENERATIVE AI IN MARKETING"





NEW DYNAMICS

MANAGING REMOTE WORK IN MARKETING



A

As early adopters of today's widely accepted remote work landscape, IDOC laid out the expectations of its workflow process in clear and distinct terms. The service-focused alliance is bolstered by a team that oversees a full range of products and services designed to provide a competitive advantage for today's independent-owner optometrists. With a membership base spread out across the country, IDOC team members are expected to put in an eight-hour day, with five of those hours earmarked; everyone is available and accessible. The balance of the time can be tailored to each person's unique needs, i.e., flex time.

The process is one that Nadine Lewandowski, VP of Sales and Marketing, finds as flexible as it is effective. The key is about striking a good balance of productivity and connection. "Early on in remote work, we leaned a little too much into figuring out how to get things

“THERE ARE A LOT OF POSITIVES TO INDIVIDUALS AS FAR AS PERSONAL FLEXIBILITY AND MANY PEOPLE ENJOY THE PRODUCTIVITY THAT COMES ALONG WITH DISTRACTION-FREE WORKING HOURS WHILE OTHERS TEND TO FEEL ISOLATED.”

— NADINE LEWANDOWSKI,
VP, SALES & MARKETING, IDOC



done versus getting creative on how to keep things fun and to keep everyone connected. But there are a lot of positives to individuals as far as personal flexibility and many people enjoy the productivity that comes along with distraction-free working hours while others tend to feel isolated."

The transition to remote work continues to impact the traditional dynamics of the workplace in many areas, including communication, collaboration, productivity, morale, and training and development. As one of the lasting legacies of the pandemic, there seems to be no slowing down of companies using some form of remote/hybrid work schedules. In fact, according to LinkedIn's "Global State of Remote and Hybrid Work" study, by 2025, an estimated 32.6 million Americans will be working remotely, which equates to about 22% of the workforce.

When Kaveh Vahdat peers out into today's ever-evolving workforce dynamic, he says the changes are methodically restructuring the process of how people get their work done. As founder and President of RiseOpp, Vahdat is helping both B2B and B2C companies across myriad industries and marketing channels find fractional CMOs.

"For many marketing jobs, it's now commonly accepted to have a remote freelancer or remote agency do the job, rather than hiring an in-house full-time person," says Vahdat, who has spent the past 20 years as a serial entrepreneur and marketing thought leader. "This ranges from more hands-on

tasks such as marketing material design to more strategic roles such as Chief Marketing Officers. For example, hiring a remote Fractional CMO has been on the rise. With that said, many companies are now focused on a hybrid model where they hire a few key members in-house, but they also benefit from the flexibility and affordability of remote teams."

Following is a look at some of the strategies remote teams can employ to keep their productive fires burning:

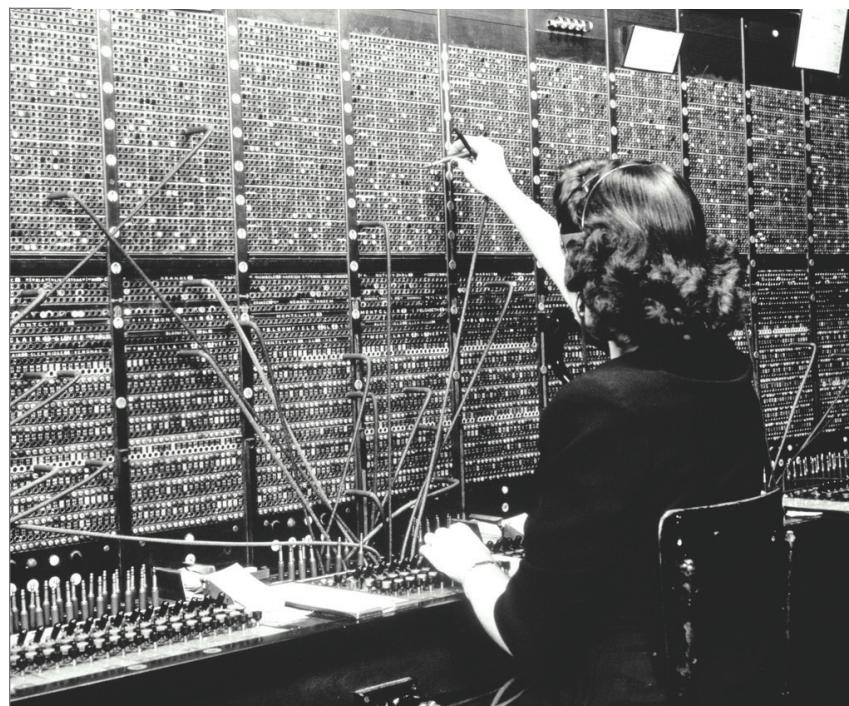
MOTIVATION

One of the key challenges is keeping the workforce motivated. A percentage of the workforce is not self-motivated and is not very organized. Office settings helped people become more organized and motivated by working in groups, which particularly impacted extroverts. "With that factor gone, managers of remote teams should be extra organized and set regular video meetings with team members (with cameras on) to maintain a certain level of motivation and organization," Vahdat says. "This also helps prevent miscommunications and reworks."

COMMUNICATION & COLLABORATION

One of the biggest challenges in remote work environments is communication and collaboration. Because there is no conference room to rally everyone in and start filling up a whiteboard with ideas, you have to get creative. Enter remote work tools and project management technologies like Zoom, Loom, Microsoft Teams, Asana, etc. In addition, OpenAI's ChatGPT and other generative AI tools can help craft more professional and clear email communications, RFPs, proposals and other business communications.

"It is important to have frequent touchpoints to make sure everyone is on the same page," Lewandowski says. "We have



found that meeting twice a week as a marketing time is the right mix for us. That allows us to stay aligned and keep each other in the loop on what we are working on and share successes and challenges, while also leaving some room to stay connected on a personal level versus being forced to be only task-driven due to being tight on time.

TEAM BUILDING

Virtual team-building activities are one way to improve teamwork among remote team members. The exercises also help smooth over the robotic relations that come with remote interactions. For example, IDOC schedules calls that are focused on personal or professional celebrations, or dedicated to marketing training and development instead of just the task-focused meetings we have become accustomed to.

"With a great project management software, you can really lean on that to make the most of the virtual facetime," Lewandowski says. "Sharing successes and challenges openly is important to fostering collaboration and teamwork. The more we communicate about what is and isn't working, the more opportunity there is for us to learn from each other or for someone to jump in and fill a gap for a team member."

ESTABLISHING POLICIES & PROCEDURES

For marketing teams, it is critical to have the best-in-class experts for each marketing channel. For example, when RiseOpp takes on a Fractional CMO project, for each marketing channel—whether it's SEO, Google Ads Management or PR—it brings in experts who have focused their careers on that marketing channel and have completed hundreds of jobs.

"This is much easier to do with a remote team," Vahdat says. "First of all, you don't need any of these experts full-



time. Secondly, when you are looking for the best-in-class expert for each channel, it may be hard to find them locally. But with remote teams, you have access to talent nationwide, and a higher chance of bringing AAA teams on board."

LEADERSHIP

More than anything else, successful remote work environments work when the policies, procedures and framework is accepted from the top, down. Having leadership that is open-minded, and is willing to listen and bounce ideas back and forth, rather than dictating them, is critical.

"Shared tools, ones as simple as shared docs or spreadsheets, or visual boards, can also be used to help with brainstorming," Vahdat says. "In traditional settings, people had longer times to chat and be on the same page. In remote ones, it's easier for miscommunications to happen. That's why clear communication—from top to bottom—becomes critical." ■

'PHONING' IT IN

- ◆ As of 2023, 12.7% of full-time employees work from home, while 28.2% work a hybrid model that combines both home and office work.
- ◆ Remote workers are 35-30% more productive than their in-office counterparts. They also save an average of \$6,000 or more a year by working remotely.
- ◆ 98% of workers want to work remotely at least some of the time for the rest of their careers. Another 98% would recommend remote work to others. Overall, 91% report having a positive experience with remote work.
- ◆ Flexibility is everything: 22% say the biggest benefit is flexibility in how they spend their time; 19% say it's flexibility in where they choose to live; while 13% say it's flexibility to choose their work location.

SOURCE: "GLOBAL STATE OF REMOTE AND HYBRID WORK," LINKEDIN

"IN TRADITIONAL SETTINGS, PEOPLE HAD LONGER TIMES TO CHAT AND BE ON THE SAME PAGE. IN REMOTE ONES, IT'S EASIER FOR MISCOMMUNICATIONS TO HAPPEN. THAT'S WHY CLEAR COMMUNICATION—FROM TOP TO BOTTOM—BECOMES CRITICAL."

— KAVEH VAHDAT, FOUNDER/PRESIDENT, RISEOPP

MARTECH

WELCOME TO THE SHOW

HOW MARTECH CAN IMPROVE YOUR ROI

According to Gartner's "4 Actions to Improve Martech ROI," today's marketers continue to be enthusiastic about GenAI, as 14% already have invested in GenAI tools, with another 63% planning to do the same in the next 24 months. Following is a look at marketing areas that would benefit the most by deploying GenAI:

40%	Simplify analysis of customer or marketing data by end-user marketers
35%	Marketing automation and customer journey orchestration
35%	Coding marketing assets or user interfaces, e.g., landing pages, emails, mobile apps, etc.
33%	Creation of personalized content and offers
33%	Content/asset creation or optimization
32%	Creation or optimization of next best actions or recommendations
31%	Marketing strategy ideation and development
29%	Advertising creative or treatments
29%	Inform conversational user interfaces/chatbots





A SINGLE TRUTH

THE NEED FOR SALES AND MARKETING ALIGNMENT

Just 35% of marketers say their sales and marketing teams are strongly aligned. Sales and marketing teams don't have a single source of truth or access to each other's data, which is leading to disconnection between teams.

Top sales and marketing alignment challenges

- Lack of effective communication between teams
- Sales and marketing teams using different tools
- Difficulty sharing data between teams

Results of sales and marketing misalignment

- Wasted marketing budgets
- Lost sales and disengaged leads
- A poor, impersonal customer experience

Marketers with a single source of truth are 56% more likely to be strongly aligned with their sales team and 26% more likely to say their marketing strategy this year was very effective compared to those who aren't aligned.

More than half of marketers (57%) found that their CRM became more important in 2023, and marketing teams using CRMs are 128% more likely to report having an effective marketing strategy. Marketers with connected tools, data, and teams performed significantly better in 2023—and AI is helping. Around three in four marketers using AI and automation say it helps their organization share data and collaborate more effectively.

SOURCE: THE STATE OF MARKETING 2024 METHODOLOGY - A HUBSPOT SURVEY IN SEPTEMBER 2023 WITH A TOTAL OF 1,400+ GLOBAL B2B + B2C MARKETERS ACROSS INDUSTRIES TO GAIN THESE DATA POINTS.

HOT OFF THE PRESS

Consumer Trust and Response: A vast majority of consumers, 92%, make purchase decisions based on direct mail promotions, indicating a high level of trust and influence exerted by print marketing. Direct mail's response rates are notably high, with rates 6 times greater than those achieved by email, paid search, social media, and online display ads combined.

► **ROI and Engagement:** Print marketing materials offer a 38% higher return on investment (ROI) compared to digital channels. Additionally, 79% of consumers act on direct mail marketing immediately, and 44% visit a brand's website after receiving direct mail marketing. The industry is expected to reach \$45.8 billion by 2024.

► **Consumer Preferences:** A striking 82% of consumers trust print ads when making buying decisions. Furthermore, 80% of printed material is read by the customer, underscoring the effectiveness of print in reaching and engaging audiences.

► First-Time Business Trials and Preference for

Tangibility: Direct mail prompts 39% of customers to try a business for the first time, and 73% of consumers prefer direct mail due to its tangibility.

SOURCE: ESSENTIAL PRINT MARKETING STATISTICS IN 2024 • ZIPDO



“ Marketing is not the art of finding clever ways to dispose of what you make. It is the art of creating genuine customer value. It is the art of helping your customer become better off. The marketer's watchwords are quality, service, and value.”

- Philip Kotler, The Father of Modern Marketing

QA

How have you leveraged visual storytelling to foster an emotional connection with prospects, particularly in the context of AI-driven B2B software companies?

We've found that visual storytelling is incredibly effective in humanizing technology, making AI-driven solutions more relatable and understandable to prospects. By incorporating custom graphics, interactive elements, and video content, we can depict complex AI functionalities in a way that evokes curiosity and engagement. This approach helps demystify the technology and showcases its potential impact on the user's daily life and work, fostering an emotional bond with the brand.

How do you think visual elements enhance the memorability of a brand or product, compared to text-based approaches?

Compared to text-based approaches, visual elements significantly enhance brand memorability. The human brain processes visuals 60,000 times faster than text, which means images, graphics, and videos are more likely to be remembered than their textual counterparts. By developing a consistent visual identity and utilizing compelling visual content, we help brands stand out in a crowded marketplace, making their message more memorable and recognizable.

Could you explain how visual storytelling has enabled your clients to convey intricate features or ideas more effectively than

CAROLINE PETERSEN

VISUAL STORYTELLER STAYS AT FOREFRONT OF TRENDS

Caroline Petersen is the founder and Chief Design Officer of Gallery Design Studio, a NYC-based design consultancy specializing in B2B AI-driven software companies.

Recently, she founded eShelf, a creative operations SaaS platform revolutionizing agency profitability. eShelf is a 24/7 self-service portal automating file management, time tracking, and project management while offering holistic 360 reporting. With eight years of experience in the global tech sector, Caroline is an expert in design, business, and technology. Petersen has been featured in Site Pro News, Medium, Dead Pixels Society Podcast, and many others. In their approach at Gallery Design Studio, they've embraced visual storytelling as a core strategy to build emotional connections with prospects, especially when working with AI-driven B2B software companies.



traditional text descriptions?

Visual storytelling has been instrumental in enabling our clients to convey intricate features or ideas more effectively. Complex algorithms, data flows, or AI processes can be challenging to explain through text alone. Through infographics, animations, and diagrams, we translate these concepts into understandable and engaging narratives, making the invisible visible and the complicated simple.

In terms of engagement, how have you seen visuals transform the way prospects interact with a brand or product? Are there specific metrics or feedback from your projects that highlight the impact of incorporating images, graphics, and videos in storytelling?

Incorporating visuals has transformed engagement levels across the board. We've observed increases in key metrics such as time spent on site, interaction rates, and conversion rates. For instance,

incorporating explainer videos or interactive demos on landing pages has led to higher engagement and reduced bounce rates. Clients have reported positive feedback on the clarity and impact of visual content, highlighting its role in enhancing user experience and facilitating decision-making processes.

Considering the specialized nature of AI-driven software companies, what unique challenges and opportunities do you encounter in crafting visual narratives for these clients?

Crafting visual narratives for AI-driven software companies presents unique challenges, such as depicting abstract concepts and ensuring accuracy while maintaining creativity. However, these challenges also offer opportunities to innovate and push the boundaries of traditional storytelling. We focus on creating visuals that not only illustrate but also intrigue, encouraging deeper exploration of the technology behind the product.

How do you tailor your storytelling techniques to resonate with a tech-savvy audience?

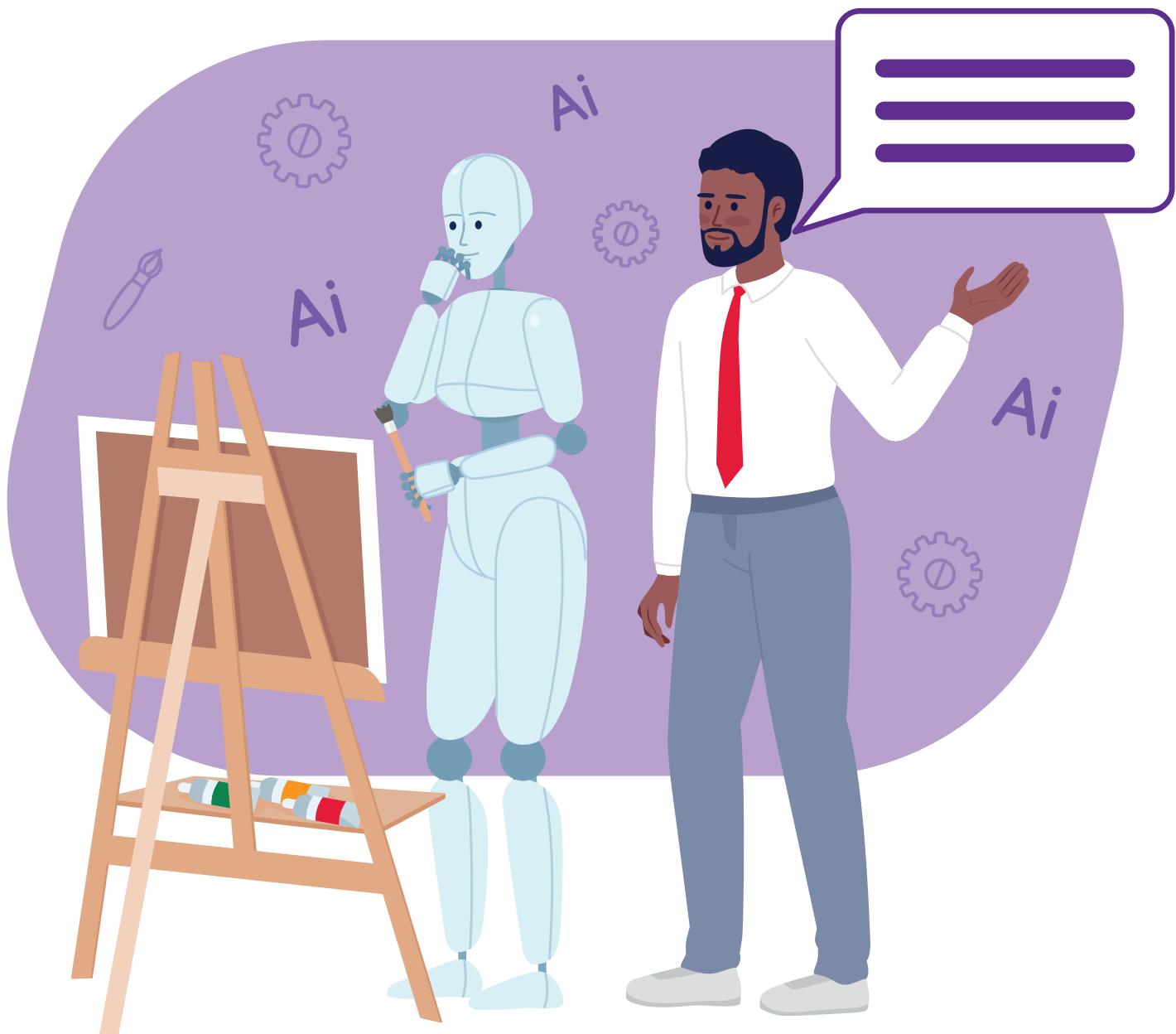
To resonate with a tech-savvy audience, we tailor our storytelling techniques by integrating data visualization, augmented reality (AR), and virtual reality (VR) elements where appropriate. We also prioritize clarity and precision, ensuring that our visuals accurately reflect the technological sophistication of the products while still being engaging and accessible.

How do you see the role of visual storytelling evolving in the B2B sector, particularly for technology and software companies?

As the B2B sector, particularly in technology and software, continues to evolve, visual storytelling is becoming increasingly crucial. We foresee a greater emphasis on interactive and immersive experiences, leveraging AR, VR, and 3D modeling to create more engaging narratives. The goal will be not just to inform but to immerse

the audience in the potential of the technology, fostering a deeper understanding and connection with the brand.

At Gallery Design Studio, we're committed to staying at the forefront of these trends, exploring new ways to leverage visual storytelling to connect B2B companies with their audiences in memorable ways. Our dedication to innovation ensures that every project exceeds the evolving expectations of our clients.



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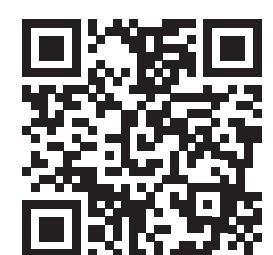
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