CommTech Guide

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Getting Started in CommTech:

From Professional to Pathfinder

GETTING STARTED IN COMMTECH: FROM PROFESSIONAL TO PATHFINDER

A New Profession Emerges

CommTech is a new Communications discipline that uses digital tools, techniques and data to enable personalized engagement with stakeholders for content creation and delivery, management and analysis of events and feedback, data visualization and more. It moves the practice of organizational communications beyond shaping perception to influencing behavior.

Just as our peers in Marketing have shifted to MarTech, communicators need to embrace new Agile teams, talents, tools and data analytics. At the beginning, MarTech was only the addition of technology to existing marketing tactics. Today, doing marketing without technology is impossible. ***MarTech is marketing***, with the singular focus of being more accountable and efficient in driving sales.

Communicators have a similar imperative – but our opportunity is larger than for our marketing colleagues, because of Communications' broader range of goals and stakeholders.

This Guide focuses on what makes CommTech new for most CCOs – its capacity to turn communications campaigns from intuition into a science. At one level, this is the simplest and most directly measurable application of CommTech – structuring a journey from A to B to C. In the long run, however, CommTech's deepest, most challenging and most impactful applications will be the ways CCOs use it to build a brand system, a culture system and a social value system – systems of relationship and meaning that underpin the entire organization and enact its purpose, values and character.

Brand, culture, societal value and the relationships they build are complex, especially at Internet scale, and will only become more so in the coming era of deepfakes, "truth decay" and assaults on trust in public communications. (For a fuller discussion of these challenges, see this ***section of The CCO*** as Pacesetter.) CommTech's methods and tools help deal with complexity, and only a mature, advanced CommTech system will equip organizations, public or private, to deal with these new threats and challenges.

Such a system is built on what we may call the CommTech Triad:

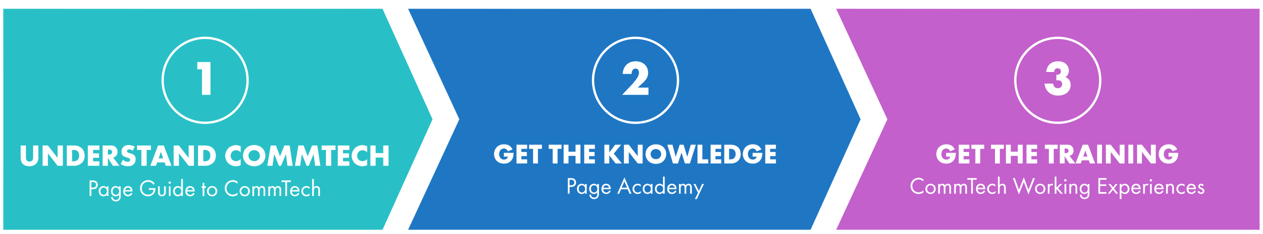
- The technologies available to us when they become more or less ubiquitous
- The skills necessary to make use of these technologies when the skills are known and acquirable
- The methods we must adopt in order to enculturate the use of the technologies.

For example, here are some of the technologies and approaches that Comms teams can adopt not just to personalize content, but to drive interactions and deepen relationships:

- **Rapid feedback gathering at scale through real-time interactions with crowds.** A growing cottage industry exists of systems that dispense with focus groups and the annual survey and start to build interaction into face-to-face, digitally augmented experiences like townhalls, driven by Sli.do or PopInNow.com.
- **CRM for Comms.** This is a real business, with fierce competition among the likes of Cision, Muckrack and specialty CRMs like Qwoted. For Comms, we might call this IRM (Influencer Relationship Management).
- **Management of culture:** A rich array of digital tools exists that Comms teams can use to create events and interventions into a culture. These include Slack, Yammer and MS Teams. The relevant communications skills are less about Agility and more about facilitation.
- **Presentation of data:** The tools are now consumer grade, yet few Comms teams have the skills to portray data visually. Tools include Canva, Tableau and Google Data Studio (which is free and powerful).

This guide doesn't go that far. It focuses on the shift from basic, Professional-level CommTech to the Pathfinder stage described in the *Page Progression Path* developed as part of The *CCO as Pacesetter.* In doing so, we aim to build a foundation for CCOs to move from Pathfinder – the stage of shaping communications campaigns – to Pacesetter – the stage of ongoing organizational transformation.

How Page helps you to pivot to CommTech



Step 1: The Page Guide to CommTech

Chapter Overview

What is CommTech and is it right for my business?

- How CommTech can play out
- Understanding and shaping stakeholder journeys
- Leveraging data to understand and shape journeys
- Leveraging experimentation and optimization
- Leveraging technology
- How to build and run a CommTech team
- Creating a CommTech culture

Start the CommTech Quickstart Guide

Step 2: The CommTech Progression Path

After learning the fundamentals of CommTech, this pathway charts a the future of its use – including the overlay of AI and machine learning to optimize journeys at scale.

Start the CommTech Progression Path

Step 3: Page Academy

In 2021, Page will be offering an intensive digital learning experience on mastering CommTech. Leave your *e-mail* and we'll make sure you know when it's available.

Chapter 1
What is CommTech?

1. WHAT IS COMMTECH?

CommTech is a new discipline – almost a new profession in itself. It enables companies to understand and engage people – not just customers but the full array of the firm's stakeholders – as unique individuals rather than as segments, audiences and "publics." It brings data-driven precision and intelligence to our work.

Most important, a robust CommTech capability enables CCOs and their teams to go beyond communicating what they want stakeholders to believe. It helps those stakeholders act upon that belief, thus narrowing the gap between perception and reality, between the positioning of a company and the actual experience one has with it.

Indeed, at its most advanced stage, it materially shapes that experience. CommTech is, therefore, a powerful enabler of authenticity.

The four building blocks of CommTech:

ILLU: the four building blocks of CommTech

1.1 The Tools

About CommTech Tools:
There are thousands of tools out there that can help you make communications more impactful and accountable. In fact there is an overload of tools and providers – just have a look at the famous *MarTech Landscape* graphic that by April 2019 aggregates more than 7,000 tools. Most of the tools that are labelled as MarTech can be applied to CommTech. We will highlight key best practice tools in four key areas – our recommendations are just a small selection – though you might find other tools more useful for your specific needs or your existing tech stack.

Tips:

- Most of these tool providers offer free trials. For the next campaign or strategy you're developing, make sure to test a couple of tools.
- Don't look for the one-size-fits-all tool – it does not exist. Rather, try to find the best 2–5 communications levers for your goals and team.

1. **Insights**

   Tools that provide data-based insights into audiences, their interests & behaviors.

   - *Google Analytics* to learn about how people come to your website and what they do there
   - *SimilarWeb* for insights into how competitors attract traffic to their website
   - *PublicRelay, Social Chorus*, *NetBase, Cision, Meltwater, Critical Mention, BrandWatch, Muck Rack* and *TalkWalker* for earned & social media insights
   - *Morning Consult* and *The Harris Poll* for brand and public opinion insights
   - *Fanpage Karma* for social media content benchmarks
   - *SurveyMonkey* for audience insights
   - *BuzzSumo* for insights into what content drives social engagement
   - *SearchMetrics, MOZ* or *Semrush* for insights into what audiences search for online
   - *SparkToro* for audience insights by channel including podcasts and social media
   - *Audiense.com* & *Facebook Audience Insights* for insights into audience demographics and interests
   - Built-in insights provided by Google, Facebook, Instagram, LinkedIn, YouTube and others

2. **Content & Automation**

   Tools that enable the effective distribution, management and optimization of content.

   - *Autopilot* to create automated content journeys
   - *LeadPages* and *Unbounce* for creating conversion-optimized landing pages
   - *Marketo, Higher Logic, MailChimp* and *Constant Contact* for email automation
   - *HootSuite* or *Falcon.IO* for scheduling, managing social posts and analytics
   - *Hubspot, Eloqua* for lead generation and management
   - *Onalytica, Tagger* and *CreatorIQ* for influencer management

3. **Experiences**

   Tools that provide efficient ways to create & deliver content experiences to audiences.

   - Facebook/Instagram *Business Manager,* Google *Marketing Platform*
   - Adobe Experience Manager
   - *Manychat* to create automated messenger experiences
   - *Intercom* to create a scalable personal website chat experiences

4. **Optimization**

   Tools that enable the tracking & optimizing of communication activities.

   - *Google Search Console* to track how your company website appears in Google Searches
   - *SearchMetrics* to benchmark a website's search visibility against competitors' visibility
   - *BuzzSumo* to benchmark the engagement potential of your content vs that of your competitors
   - *VWO* and *Optimizely* to A/B test different messages and designs on your website
   - All the tracking & Testing capabilities by Facebook (*Ad reporting, split tests, dynamic creative tests*), Google, LinkedIn, Twitter and others
   - *Segment* to align and categorize all customer data
   - *Decibel* to analyze and optimize digital experiences

5. **Workflow/Management**

Tools that provide more efficient and agile ways to collaborate in and across teams, projects and organizations

- *Microsoft Teams, Slack* and *Workplace by Facebook* for communication and collaboration
- *Atlassian, Trello* and *Asana* for Agile project management
- *G-Suite, Box* and *Dropbox* for collaborative documents
- *Google Data Studio, Tableau* and *PowerBI* for data visualization

1.2 About Methods & Frameworks

Driven by digitization, communications and marketing have advanced dramatically over the last decade. Despite this, most communication departments still use old frameworks (e.g., (Attention, Interest, Desire and Action, or AIDA) and methodologies to plan and implement their communications activities. We believe that communications teams need to shift from a classic "inside out" perspective to a stakeholder/audience-centric one. It's less about the message you think is important than helping your stakeholder move in his/her personal journey.

Furthermore, your job as a communicator is not done when a message or content piece is published. Instead, your job is to "move your stakeholders" through their journeys – using the full spectrum of communications disciplines and tools, including paid, owned, earned and shared.

As a side note, shared and paid media need to go hand in hand. If a brand page on Facebook publishes a post without advertising it, the average organic reach rate is 6.4%. To put it more bluntly, social platform content without paid amplification is a waste of time and resources. The true power of social platforms lies in their advanced targeting capabilities. You can only truly leverage these targeting capabilities if you apply paid advertising.

That said, for more than a decade now companies have been bombarding their stakeholders with mediocre content that they have pushed out to everyone, leading to annoyed stakeholders. We need better content and smarter distribution. This is what CommTech enables you to do.

ILLU: corporate character

One new, journey-based framework for doing that is the Page Model, which Page developed as part of its 2012 report, *Building Belief.* Grounded in the idea of corporate character – the unique, differentiated identity of the enterprise – it describes how, for an authentic enterprise (see *The Authentic Enterprise,* 2007), the company's mission, purpose, values, culture, business model, strategy, brand, policies and positions are aligned to comprise a cohesive whole. This is foundational work for the CCO and underpins everything else the Communications function does.

Based on that corporate character, the enterprise begins engaging stakeholders by creating shared **BELIEF.** On the basis of this shared belief, we then move stakeholders to take a desired **ACTION** – to purchase a product, work for the company, buy the stock, refer a friend, etc. Importantly, this is not the conclusion of the journey. From there it is critical to instill **CONFIDENCE** that this action mattered and to support continued desired behavior – to turn an initial action into a habit. This then opens the possibility for a fourth stage, **ADVOCACY** at scale. We all know that peer recommendations are the most powerful driver of behavior. Converting stakeholders who have changed their behavior into stakeholders who advocate for you is a powerful driver not only of business outcomes – like sales, talent acquisition or investment – but also of establishing enduring brand value and reputation.

For CommTech purposes, this simple journey framework can help you align your entire communications team to plan and execute their activities and make your communications more impactful. CommTech teams look at every decision-making process towards an audience/stakeholder action as a journey – a journey filled with questions. The Page Model helps to structure all relevant aspects of communications initiatives: audience definitions, objectives, targeting, messaging, channel mix and KPIs.

As an example, let's look at how the framework helps break the huge audience of "car buyers" into four sub-audiences, based on where in their journey towards buying a new car they currently stand. More details about the journey framework will be discussed in *chapter three* of this guide.

It begins before belief has been created – with a general interest in the topic.

Key concept: A "user journey" represents a possible path or set of paths an individual might take toward making a decision and taking an action. Some Agile methods and models of design thinking use a technique called journey-mapping to describe these possible paths. These maps also help to plot where an individual might encounter content from or have an experience with the firm, in order to maximize the likelihood of a choice beneficial to the firm, such as choosing to buy a particular car.

INTEREST Phase:

Audience: People driving cars

Their stage of awareness: they do not actively look for a new car, but because they are drivers, they are generally open to paying attention to car-related messages and content.

BELIEF Phase:

Audience: People driving cars, thinking they might need a new one.

Their stage of awareness: they start actively searching and engaging with content about cars, slowly filtering out a relevant set of choices for themselves.

ACT Phase:

Audience: People driving cars, thinking they might need a new one NOW.

Their stage of awareness: They google more specific questions, search for online reviews on YouTube and elsewhere, visit dealer sites, visit brand sites, visit price comparison sites, request quotes and book test drives, all because are ready take a decision.

CONFIDENCE Phase:

Audience: People who bought a car from you.

Their stage of awareness: they want keeping peace of mind about their purchase decision and they want to make sure to keep their new car running smoothly and trouble-free for as long as possible.

More details about the journey framework will be discussed in *chapter three* of this guide.

1.3 Analytics

Today there is a plethora of data available to analyze and track. The key challenge is not access to data, but rather to:

- Collect and combine the right data
- Define the right KPIs and patterns to track
- Translate data into actionable insights and translate this into better communication experiences for stakeholders and audiences
- Comply with privacy and data protection laws around the world
- Strengthen perceived personalization benefits and reduce any perceived creepiness of privacy loss

Just as with tools, there is no "one size fits all" analytics strategy for communicators. Rather, it's important to understand the key building blocks of such a strategy. This Guide provides a rough overview of these building blocks – and one way to structure them: a journey-focused structuring, following individuals from discovering a business to becoming a loyal client, stakeholder or even ambassador.

Visibility Data (INTEREST/Awareness)

Who has – and who should have – the opportunity to see your brand and its content? What content do they see? What competitive content do they see?

- Impression data from social media & media monitoring tools; data from Google Search Console; data from classic advertising

Engagement Data (BELIEF/Consideration)

Who is engaging with your content? What is most/least engaging for your audiences? What's working for your competitors?

- Engagement data (views, likes, comments, shares, clicks, time on content etc.) from social media platforms, your websites & apps.

Conversion Data (ACT/Conversion)

Who is acting upon your communications the intended way? What makes your stakeholders/audiences act? How much does it cost to get people to act?

- Signup, download, purchase, inquiry & application data from your landing pages and apps and email marketing activities.

Loyalty Data (CONFIDENCE/Retention)

Who are your most loyal and valuable stakeholders? Who is advocating for your business?

- Data from your CRM: holistic views on your stakeholders/customers

Key concept: Data visualization is part of an emergent CommTech triad that allows us to make effective use of data. By itself, gathering data provides little value. However, with tools, techniques and methods to interpret the data, present it, compare it and share it, data visualization can fuel powerful insights and enable continuous optimization.

1.4 Agile Teams

Agile comes to the Communications profession by way of numerous other fields that have benefitted from its principles. Having begun in software development, it is a method of work well-suited for an era with abundant data about how stakeholders experience what we produce. In essence, Agile is a learning method – plans for work are made in short bursts designed as much to show whether or not our hypotheses are correct as to produce results. Given the Communications profession's historical responsiveness to the high velocity of the news cycle, it may come as a surprise that true Agile methods are quite difficult for us to adopt. As a profession, we tend to trust our instincts and make decisions based on gut, whereas Agile methods rely on a frequent cycle of data and other feedback to continuously adjust the "product" in the marketplace, whether that product be a piece of content, a talking point, a website or an event. At the end of the day, Agility should reduce risk in organizations, as it equips teams with the ability to test and learn in smaller increments with less of a commitment to any one approach.

Unfortunately, the term "Agile" has come to mean many things to many people, so let's take a look at some specific skills and technologies we'd need in order to take advantage of this modern method of managing work.

1.5 The CommTech Talent Mix

These are some of the skills and capabilities needed to run an Agile CommTech team:

- **Data & Analytics specialists:** Professionals in working with data, using Web Analytics, Social Analytics, CRM, etc.
- **Content specialists:** Professionals with a proven track record of strategically producing and distributing content that attracts, nurtures and retains stakeholders and audiences for specific actions/goals.
- **Conversion Writing specialists:** Professionals who understand how to leverage cognitive biases and key insights from behavioral science to produce headlines and copy that gets people to read and act. This is not about prose; it is writing for algorithms and people's actual behavior.
- **Social & Community Nurturing specialists:** Professionals who know how to build and nurture a group of loosely connected stakeholders into a community with shared purpose and beliefs.
- **Digital/Performance Advertising specialists:** Professionals who know how to systematically and strategically leverage the big tech platforms (Facebook, Google, LinkedIn and others) to reach stakeholders at the right moment in their journey. This skill is crucial, and historically it used to sit in Marketing teams. You need to get such people into your CommTech team immediately.
- **Conversion Optimization specialists:** Professionals in running serious A/B and multivariant tests with specific conversion optimization tools and frameworks. They ensure that every communications dollar spent is yielding the maximum return. The insights generated by these specialists are also an important feedback signal that will make the entire CommTech team smarter and more impactful over time.

Key concept: Our use of behavioral triggers, social signals and other so-called *"dark patterns"* has ethical implications. One practice in digital marketing is the "false front door" – creating a front end that simulates a true back-end capability. For example, in the travel industry widespread use of fake social signals such as "38 other people are booking this hotel" has led to reproach of travel companies. Clearly, the practice of faking data is unethical. Ask yourself, before deploying a test or even the real capability, whether your use of social triggers and personalization crosses an ethical line.

1.6 Making Teams Agile

To make CommTech real – and to respond to the speed and complexity of the world today – you need to increase the collaboration and flexibility within and among your teams. In particular, you need to increase the speed at which your teams react to new signals and feedback.

The key is Agile. It came out of software development but can be applied to almost any kind of team working on a common goal. Many books and white papers explain how to build and operate Agile teams. There are frameworks and methodologies like Scrum or Kanban, tools and platforms like Trello or Confluence. You can start by taking a look at *these very useful resources that Atlassian* (a leader in enabling Agile teams around the world) has developed over the years.

Key concept: Agile is a method of speeding up incremental improvement. Like traditional project management, it recognizes time, cost and quality as finite and mutually dependent variables. What Agile methods change is the increment of work – instead of attempting to predict progress within a project months in advance, the typical Agile sprint is two weeks.

1.7 CommTech has a Progression Path

CommTech represents and requires a new mindset – that the work of Communications is not limited to messaging and storytelling in pursuit of shaping opinion and fostering good will. Rather, our work can shape the actual behavior of the company and the people who matter to it – moving them from belief to action to confidence to advocacy. Furthermore, our work can foster a web of relationships with and around our firms and the people they comprise by turning seemingly random connections into addressable networks. Therefore, CommTech knowledge and facility will be critical success factors for all Comms roles. The Comms team will jointly own hard KPIs (such as recruitment, sales and compliance) with other functions, and their insights will inform the business strategies and choices of Marketing, Sales, HR and Operations.

CommTech is a mindset, but it's also a journey. As part of The *CCO as Pacesetter,* Page as developed three-stage journeys called Progression Paths that lay out how CCOs can advance their work in four critical dimensions of their role: brand stewardship, culture change, societal value creation, and CommTech. These begin at the Professional level and progress to Pathfinder and, finally, to Pacesetter, which is where the work is highly systematized across the organization, and goes beyond the creation of highly effective campaigns to the ongoing transformation of the organization. For more on these Progression Paths, please see *https://paths.page.org*.

Let us take you through the three stages of a CommTech team:

ILLU: illustration of progression path for CommTech

PROFESSIONAL: Content is king.

- Listening yields insights.
- Create, distribute content tailored to the channel
- Monitor social platforms for keywords, sentiment
- Audience determined by platform and channel
- KPIs: Content engagement (views, likes, shares, retweets)

PATHFINDER: Campaigns that move stakeholders to action.

- Establish Agile teams
- Target by digital behavior
- Design journeys that lead to outcomes
- Content for each touchpoint
- Launch, iterate, optimize
- Paid is essential
- Detect, address fake news
- KPIs: Audience engagement (open rates, click-throughs, conversion)

PACESETTER: Optimize for performance and transformation.

- Hyper-targeting
- Dynamic content
- Continuous optimization
- Identify opportunities for on-brand activities
- Source of rich enterprise data
- KPIs: Net Promoter Score, user reviews, job offers accepted, leads generated and progressed

Dimensions	PRACTITIONER	PROFESSIONAL	PACESETTER
Key Objective	Get audiences to see our message	Give audiences all the content elements they need to act	Find the most effective way to get audiences to act
Key Activities	Get audiences to see our message Focus on editorial production per Channel	Focus on creating coherent campaigns/journeys Focus on creating content campaign/journeys	Focus on performance creation & optimization Focus on ongoing testing and optimization to push outcomes on different levels
Key Team Roles & Skills	Editorial Content Creators	Editorial Content Creators Designers Analysts	Editorial Content Creators Designers Analysts Performance Marketers Technologists (Developers etc.)
Analytics	Focus on monitoring what people say about our brand on Social Media □ tracking what's happening to our brand based on reactions to our brand	Focus on identifying risks and opportunities for our campaigns & brand □ trying to identify what's happening to our brand early on based on the very first reactions to our brand	Focus on identifying and leveraging insights into our audience's needs and wishes □ trying to anticipate what's going to happen to our brand based on trends and discussions in our key audiences (not necessarily about our brand)
Issue/Crisis	Identify when it happens □ data based proof of the dimensions of a crisis □ Reply with classic crisis management	Early warning system □ data based identification of a crisis on a specific channel, before it spreads across all channels □ Reply with crisis communi-cations – aligned across all channels	Anticipation based on patterns □ data based anticipation of issue/crisis risks based on activities in key audiences, before they are addressed at our own company and brands □ Prevent issues/crisis with preventive audience engagement
Audience Definition & Targeting	Audience is determined by platform: focused on reaching as many people as possible on each platform (Twitter, Linkedin, News etc.) □ Macro-Targeting	Audience definition & segmenta-tion based on bigger groups □ B2B, B2C, Men vs Women, Young vs Old, Banking vs Health etc. □ Segment-Targeting	Audience definition based on personal behavior of individuals in audience segments □ Micro-Targeting
Definition & Tracking of KPIs	Content Engagement (Views, Clicks etc) □ how well is our content perceived	Audience Engagement □ how well are we moving audiences forward in their journey (CTR, OR, ER)	Business outcomes and costs per business outcome (cost per conversion etc.) □ how efficiently are we contributing to the bottom line

1.8 Where does your team stand on the Progression Path?

Key Takeaways from Chapter 1

Congratulations, you just finished chapter of the Page Guide to CommTech. Let's do a quick wrap-up:

1. CommTech is a new way to undertake communications. It will make communications more impactful and accountable, just as MarTech did for our marketing peers.
2. CommTech is not just about technology; it is embracing a completely new way of practicing communications by building new Agile teams, hiring new types of professionals, and leveraging new tools and data analytics for everything we do.
3. One key shift in CommTech is to become less inside-out and much more audience/ stakeholder-centric.
4. A key framework that helps align all communications efforts accordingly is the Page Model.

Chapter 2

How Pathfinder-level CommTech can play out

2. HOW PATHFINDER-LEVEL COMMTECH CAN PLAY OUT

In this chapter we're going to look at a case study that shows what impressive results can be yielded when CommTech is applied at the Pathfinder level. It's important to note that this campaign did not require hefty budgets. The overall campaign budget (agency costs & ad spend) were below $30,000 USD.

2.1 Winning Donors for Blood Stem Cells by applying the CommTech framework

Swiss Blood Stem Cells is an institution within the Swiss Red Cross (SRC). Its mandate is to secure a suitable donor for every patient who needs blood stem cells. Blood stem cells are often the last hope for treatment of patients diagnosed with leukemia or other types of blood cancer. To achieve its objective, the organization needs to keep its donor database filled with suitable donor candidates at all times.

For a couple of years, Swiss Blood Stem Cells had experimented with social media and digital communications tactics to improve recruitment of new donors for its database. Nothing really moved the needle. In early 2019 a Digital/Social Marketing pilot campaign finally yielded breakthrough success. Let's look at how this campaign applied key CommTech frameworks.

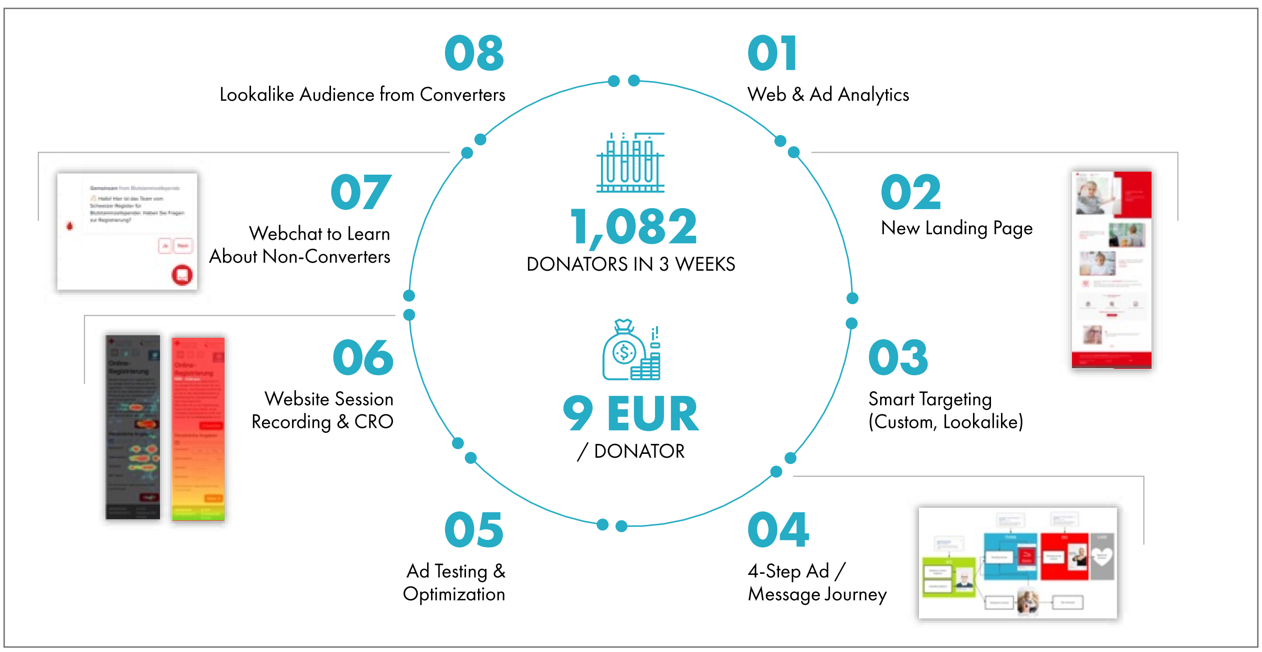


Image: how a CommTech lead campaign yielded in a big breakthrough for Swiss Blood Stem Cell.

Step 1: Conduct data analysis.

First, the team analyzed all existing website, landing page analytics, user *session recordings* and organic and paid social traffic data to identify patterns and especially signs of friction in the online process of signing up to the donors database. Based on the data the following insights and actions became apparent:

Insight	Action
The signup landing page was having too much friction, preventing potential donors from completing the process of registering for donation.	Redesign the page to optimize the user's journey to donation. This would require new design and copy.
The narrative on the signup landing page was not consistent with the state of awareness of its users. Users were asked to become donors at the very start of their journey, before they fully understood and appreciated the need and value of doing so.	Change the narrative to match the mental journey of a potential donor.
The data showed larger audiences interested in becoming blood stem donors, but many exited the broken signup process. This abandonment rate is like someone putting an item in their shopping cart but not completing the purchase.	Optimize the journey as the user encounters content and is prompted to take action. This includes observing user behavior, hypothesizing why one may be choosing to abandon the journey and testing those hypotheses.

Step 2: Create a Landing Sign-Up Page that reflects the customer journey.

The team designed a new landing page that followed a clear journey framework:

PROBLEM

Before talking about becoming a blood stem cell donor, the new page spoke about the problem of leukemia. What is it, who is affected (even kids) and how bad is it?

→

AGITATION

Agitation is achieved by establishing an emotional connection, portraying the drastic impact a leukemia diagnosis has on a patient's life and family. This reinforces why the action matters.

→

SOLUTION

Only after establishing understanding and meaning were prospects given a call to action: the only way to help is to become a blood stem cell donor. To reassure those who made it this far in the journey, users were shown faces and stories from leukemia patients that overcame cancer with a blood stem cell donation

Step 3: Create smart audience targeting based on existing root audiences.

Based on the audience insights from Step 1 the team built custom and lookalike audiences on Facebook and Instagram. This is a common feature on such social platforms, through which teams can use the attributes of stakeholders who took a desired action (i.e., their interests and online behavior, such as the sites they visit, pages they like and people they follow) and identify unengaged stakeholders with similar attributes who would likely be similarly inclined to act. These audiences are then reached via paid social postings on those platforms. In order to work with such audiences, the team deployed the *Facebook pixel* on the blood stem cell website.

This is critical in terms of effective paid promotion. Rather than spending on reaching broad swaths of stakeholders with a small subset who might find the topic resonant, this targeting means the spend is being applied to an audience whose behavior suggests they would be much more receptive in the first place.

Step 4: Create a series of social ads that mirror the customer journey and set up remarketing loops so users see the right ad at the right time in their journey.

The team then took existing creative collateral and created four-step social ad journeys (see *Chapter 1* and *Chapter 3* to slowly but steadily lead users from the Problem to the Solution.

In the **INTEREST** stage, targeted users only saw ads that were talking about the problem. Only if they engaged with these ads, and thus signaled interest in the subject, would the team retarget them with **BELIEF** ads about how a blood stem cell donation helps patients suffering from leukemia. If they engaged with these as well, they were retargeted again with ACT ads asking them to become a donor and pointing them to where they could sign up. Users who donated received **CONFIDENCE** ads. In these the donor was thanked for their personal contribution – and, looking ahead to **ADVOCACY,** was asked if they have friends and colleagues that could become donors, too.

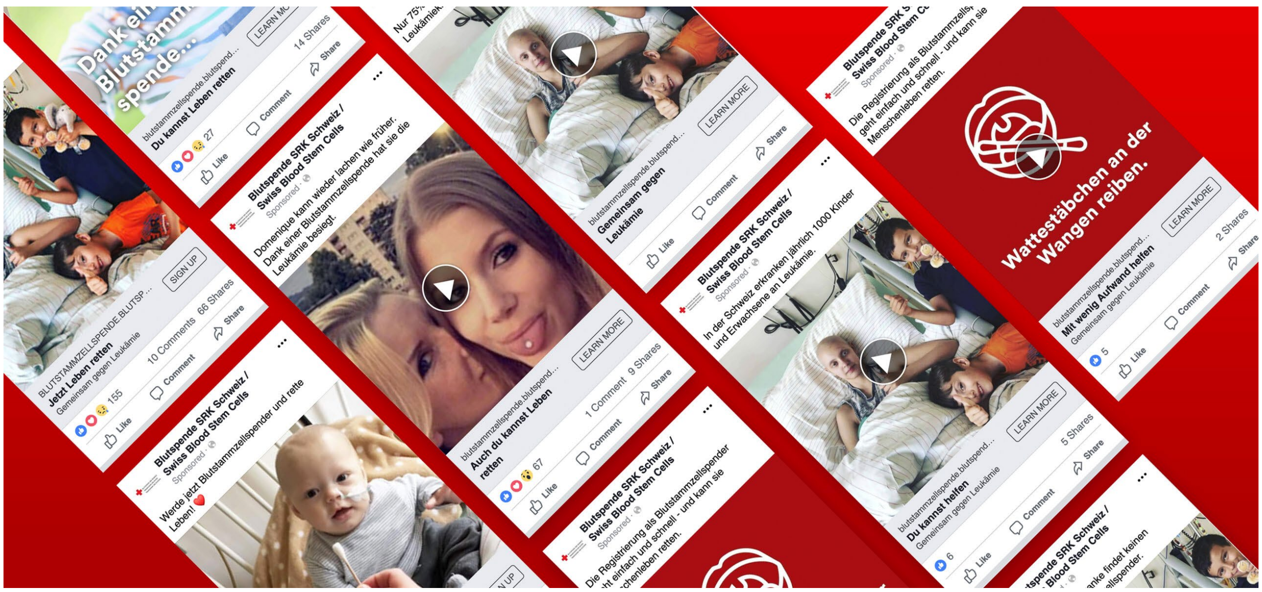


Image: social Ads mirroring the customer journey.

Step 5: Conduct A/B testing of ads to optimize performance.

Every digital ad campaign was designed from the outset with A/B testing in mind. Agile teams are perpetually experimenting with different versions of everything from ads to subject lines to calls-to-action, all the while observing behavior, refining the approach and conducting further experiments.

For the blood stem cell donor campaign the team ran several A/B tests in the first 14 days to maximize return on ad spend and content investment.

- Collateral
    - Texts
    - Imagery & Videos
    - Call to Action Buttons
- Targeting
    - Different Targeting criteria

- Others
  - Bidding (automated bidding, manual bidding etc.)
  - Goals (optimizing for reach, engagement, conversions etc.)
  - Channels (Instagram vs Facebook, feed vs Stories etc.)
  - Delivery (Daytimes, Weekdays etc.)

If you're interested in A/B testing on the Facebook family of apps, head over *here* and *here.*

Key Concept: A/B testing and multivariate testing constitute an approach to development in which multiple versions of the same content, website, or other assets are introduced to a limited number of participants in order to gauge the relative effectiveness of that asset. After observing the asset's success in driving a specific behavior – for example, an email or website encouraging the reader to subscribe – the most successful version of the asset is released to a broader audience. Simple A/B testing introduces a single change between two or more versions of an asset (such as a change in the length or tone of an email subject line or an article's headline.) Multivariate testing introduces multiple changes between versions of the asset. Multivariate testing is often accompanied by automation for selecting the 'winner' due to the complexity of comparing many versions.

Step 6: Conduct session recordings on the new landing page.

During the campaign we recorded user sessions and reviewed these every three days to identify potential friction points. By observing actual user behavior, it becomes much clearer what people are doing and informs ideas about why they might be failing to progress through the journey.

Step 7: Deploy chat to learn from those who abandon the journey.

We can test and optimize as much as we want, but there will always be people who do not convert for whatever reason. After 14 days we realized that there was a groundswell of users coming to the site who were not signing up to donate. To learn more about why they click through to the site but then decide not to sign up as donors, the team deployed a simple webchat (via *Intercom*) to ask them directly. Based on the intercom webchat platform the team set up a bot that was automatically triggered when users came to the site via the paid campaign, stayed on the page for a while but did not complete the sign-up form. They were asked a simple question: Are there any questions about becoming a donor that you would like us to answer?

Based on the chat we gained more than 100 replies and more insights on what kept people from signing up. Some of the reasons where: 1) I'm not eligible to donate blood stem cells; 2) I might donate blood stem cells in future, but I'm not ready now; 3) I was interested but the medical sign-up form helped me realize that this is not what I want right now

Step 8: Develop lookalike audiences to reach a broader audience.

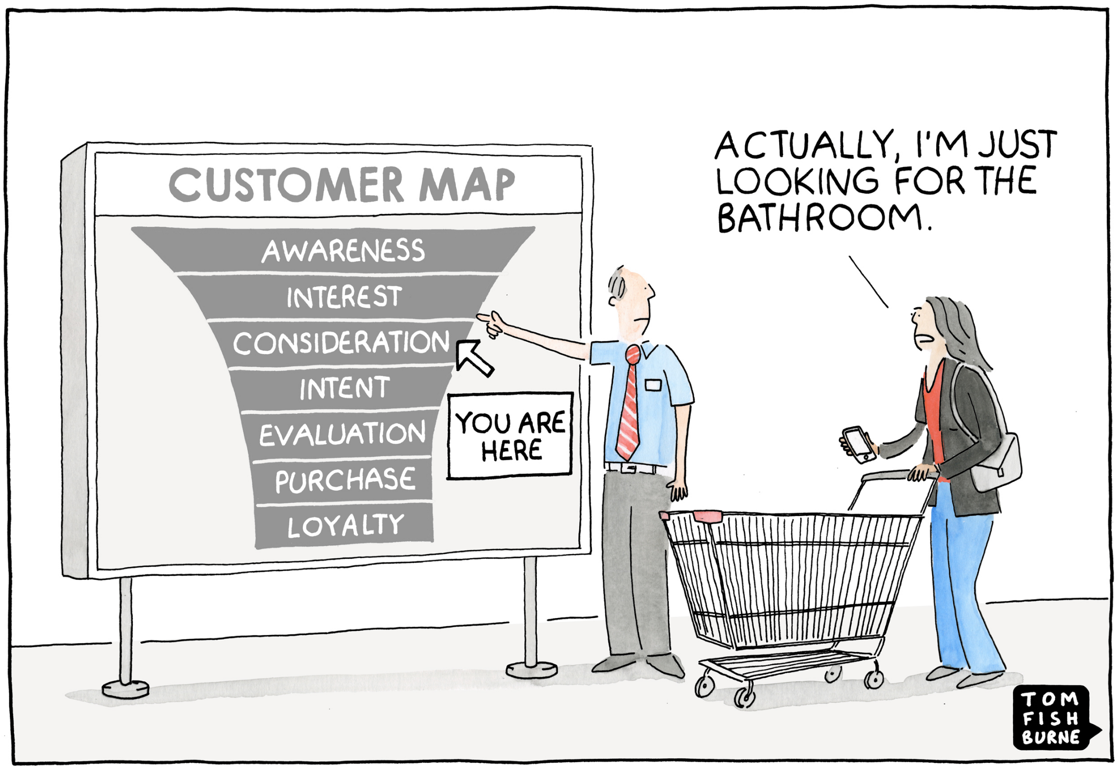
The campaign signed up more than 500 donors after the first few days of testing. Based on that early success, the team deployed a *lookalike audience* based on these new donors. After three weeks the pilot campaign recruited 1,082 new donors for €9 (~$10 USD) ad spend per user. These were – and still are – breakthrough results for the organization.

This was a by any definition a "small" campaign. The budget was below $30,000 USD. And there was no expensive creative being produced for it. The team responsible for this campaign simply repurposed existing collateral and very systematically applied key CommTech frameworks.

Chapter 3

Understanding and shaping stakeholder journeys

3. UNDERSTANDING AND SHAPING STAKEHOLDER JOURNEYS



Comic: Customer Journey – Marketoonist.com

In Chapter 1 we discussed the fact that stakeholder journeys today can be analyzed and tracked. In this chapter we'll introduce a stakeholder-centric journey framework that will enable you and your team to better map journeys – and to align communication initiatives with those journeys in mind.

Before we get to that, it is worth exploring how the Page Model can shape a possible stakeholder journey framework and how it can be used to adjust all relevant parameters of a solidly planned communication or marketing initiative.

Let's see how the framework was applied in the Swiss campaign to recruit new blood stem cell donors that we discussed in *Chapter 2*.

The framework helps you to define your audience segments, their consideration stages and their behavior in each stage of the journey.

Consideration Stage	Audience criteria	Their behavior
INTEREST	People who already gave a regular blood donation[1] OR people who have a personal interest in Leukemia.	These people are not yet actively thinking about blood stem cell donation, but because of their audience criteria they **are more open to BELIEVE** messages about blood stem cells than the general public.
BELIEF	People who are actively researching how they can personally engage in the fight against leukemia.	These people – based on intrinsic or extrinsic triggers (e.g., friend is affected with leukemia, or they stumble over a story about a leukemia patient on a news site, or see an ad on social media) – **start to actively think** about doing something for leukemia patients themselves – and thus start researching options.
ACTION	People who are actively researching how a blood stem cell donation works and how to become a donor.	Based on research and options compared, as well as outside factors (ads that are targeting them), these people are now ready to DO something: register as a blood stem cell donor.
CONFIDENCE	People who are actively researching how a blood stem cell donation works and how to become a donor.	These registered donors now have **CONFIDENCE and peace of mind** with their decision (keep thinking it was worth it).

There are a few important things to highlight:

- For any campaign, the **BELIEF** audience is a segment of the **INTEREST** audience, the **ACT** audience is a part segment of the **BELIEF** audience – and so on. So it's the same users/audiences that move from **INTEREST** to **CONFIDENCE**. And the audience gets smaller the further users progress through the journey. Unless you have 100% conversion, not everyone is taking the journey.
- It's a fluid journey. Throughout your communication/marketing initiative there are hundreds or thousands of users moving through these stages. And they all do so at their own speed.
- There are all kind of shortcuts in the journey. Some people get triggered with an earned media piece in the **INTEREST** phase and instantly jump to the **ACT** phase.

And here's the key thing:
Depending on where in the journey one currently is, their need for content/message/activation is completely different. Sounds logical, right?

But still, a lot of communication and marketing initiatives are planned and executed assuming that everyone is receptive to the same messages and content. This is one of the biggest problems in communications today. If you want to transform your communications team from simply pushing out messaging, if you want them to help stakeholders really move along their personal journeys and take a desired action, you need to start designing and implementing communication and marketing initiatives that are aligned with people's journey stages. This is exactly what the Page Model helps you do.

1 *The hypothesis was that people who already donated blood are more likely to be open to considering blood stem cell donations.*

3.1 How to Apply the journey framework

Now, based on this initial journey outline, the next step is to align all key parameters of your communication/marketing initiative with the journey.

Let's look at how that has been done for the blood stem cell campaign presented in Chapter 2.

Consideration Stage	Audience criteria	Targeting	Objective	Storyline[2]	Channels	KPIs
INTEREST	People who already gave a regular blood donation[3] OR people who have a personal interest in Leukemia.	**Behavior targeting:** · custom and lookalike audiences based on people who donated regular blood · custom and lookalike audiences from website visitors to pages on blutspende.ch that cover regular blood donations · followers of the Swiss blood donation organization's social media channels · content engagers on social media – people who frequently engage with content published by the Swiss blood donation organization on social media · lookalikes of people who signed up to become blood stem cell donors in this campaign **Interest targeting:** · people interested in blood donation · people interested in leukemia and other cancer topics	Visibility	Leukemia can afflict anyone. Only a blood stem cell donation helps.	Facebook & Instagram ads	· Reach/Impressions · Cost per Impressions

2 *These are not the exact messages in the social ads, but they define around what key storyline messages have to be crafted.*
3 *The hypothesis was that people who already donated blood are more likely to be open to considering blood stem cell donations.*

Consideration Stage	Audience criteria	Targeting	Objective	Storyline[2]	Channels	KPIs
BELIEF	People who are actively researching how they can personally engage in the fight against leukemia.	**Behavior targeting:** · people who engaged with SEE ads (and thus signaled interest) · custom and lookalike audiences of website visitors to specific "blood stem cell" related pages on blutspende.ch **Interest targeting:** · people who visited sites, used apps or searched keywords around leukemia and blood cancer	Consideration	This is how the blood stem cell donation takes place, explained step by step. Campaign copy: Luca 1 – Leukemia 0. Thanks to a blood stem cell donation Luca is back in school and enjoys being a child	Facebook & Instagram ads Google ads (Search ads)	· Engagement (Clicks, Video Views, Likes, Comments and Shares) · Cost per Engagement
ACTION	People who are actively researching how a blood stem cell donation works and how to become a donor.	**Behavior targeting:** · people who engaged with THINK ads (and thus signaled interest) **Interest targeting:** · people who visited sites, used apps or searched keywords around blood stem cell donations	Conversion	Donate blood stem cells and save lives. Copy: Not quite ready to become a blood stem cell donor? Subscribe to our newsletter and follow us and other committed people in the fight against leukemia.	Facebook & Instagram ads Google ads (Search ads)	· Signups on the Donor Landing Page (submitted forms = new donor) · Cost per signup/donor
CONFIDENCE	People who registered as a blood stem cell donor.	**Custom targeting:** · people similar to those who signed up as donors in the campaign	Advocacy	Message; You are a hero. Do you also have heroes who want to get involved in the fight against leukemia among your friends?	Email	· Referrals – number of forwarded emails, shared posts etc.

This is it. Now you have a clear roadmap for your communication initiative. These are the next three crucial steps to move from this plan to execution:

- **Step 1:** Develop all the content collateral for the different need stages in the journey.
- **Step 2:** Set up the automation triggers[4] and actions along this journey map. Without marketing/ communication automation you will never be able to execute a journey optimized initiative. For the blood stem cell donation campaign the automation triggers and actions were all set up in Facebook Ad Manager. One key requirement is to have Facebook Pixel implemented on the destination website (in this case, it was blutspende.ch). To be able to define these triggers you need to understand what data points you can leverage. That's our focus in the next chapter.
- **Step 3:** Launch automated campaign, monitor, test and optimize.

4 *A trigger is an action or criterion that a member of your audience needs to fulfil in order to automatically deploy an action (e.g., a Facebook ad or an email).*

Chapter 4

Leveraging data to understand & shape stakeholder journeys

4. LEVERAGING DATA TO UNDERSTAND & SHAPE STAKEHOLDER JOURNEYS

A big part of people's decision-making journeys now happens online or is triggered and shaped by online stimuli. Whether you're trying to better understand what a diabetes diagnosis really means, which political candidate to support or what company to work for, you will undoubtedly do a substantial part of your research on Google. This presents two main questions for undertaking journey-based communications and marketing initiatives:

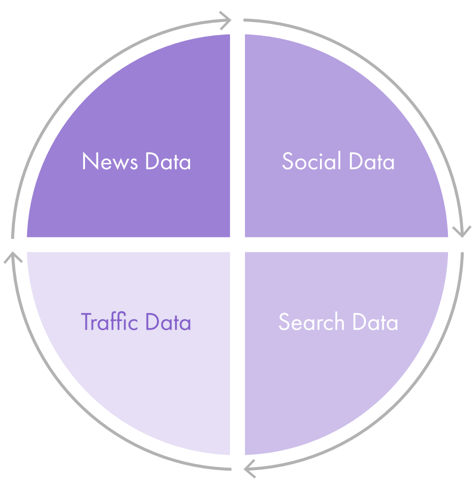
1. How do you identify what the decision-making journey looks like? (Understand that you'll never identify the exact journey. Think of it more as a journey corridor.)
2. How do you know where in the journey someone is at any given moment, and how can you create an automated journey campaign based on this?

The answer to both questions lies in data. In this chapter we're looking at what kind of data you can leverage to implement a journey campaign.

4.1 What data to analyze to understand the anatomy of a decision-making journey

Generally there are two main categories of data sources. One is topical, market and competitive data that you acquire via research tools and market research. The other is comprised of all the data in your own business/digital ecosystem, from how consumers interact with your website to which of your ads they engage with (or not). In many cases, this internal data can be augmented by data from other functional areas. Does HR have data about employee roles and training that can inform engagement on retraining programs? Does Public Affairs have data on policy influencers that can inform engagement with them? The more integrated data is across the organization, the more robust and actionable it becomes.

TOPICAL, MARKET & COMPETITIVE DATA



DATA FROM YOUR OWN ECOSYSTEM

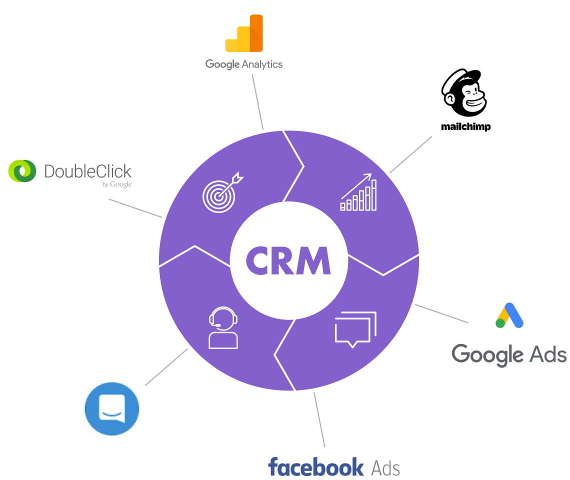


Image: two main categories of data sources that give you insights into how topical journeys can look like

If you're tackling a new initiative, oftentimes you get the most valuable insights by looking at the topical, market and competitive data before mining the data from your own ecosystem.

4.1.1 NEWS DATA: UNDERSTANDING THE GENERAL PUBLIC'S PERCEPTION OF A TOPIC.

News Data is what you probably know best. It's relevant because what people hear or see on mainstream media often shapes the general context in which a communications initiative is being perceived. If your company has had bad press for a while, your employer branding campaign will perform differently than when coverage was positive. Most organizations habitually monitor media coverage, and many analyze it for tone, sentiment and message delivery.

To perform quick and reliable full-scale topical media analysis, leverage tools like ***BrandWatch*** or ***Meltwater.***

4.1.2 SOCIAL DATA: UNDERSTANDING THE GENERAL DYNAMICS & EMOTIONS IN A TOPICAL AREA

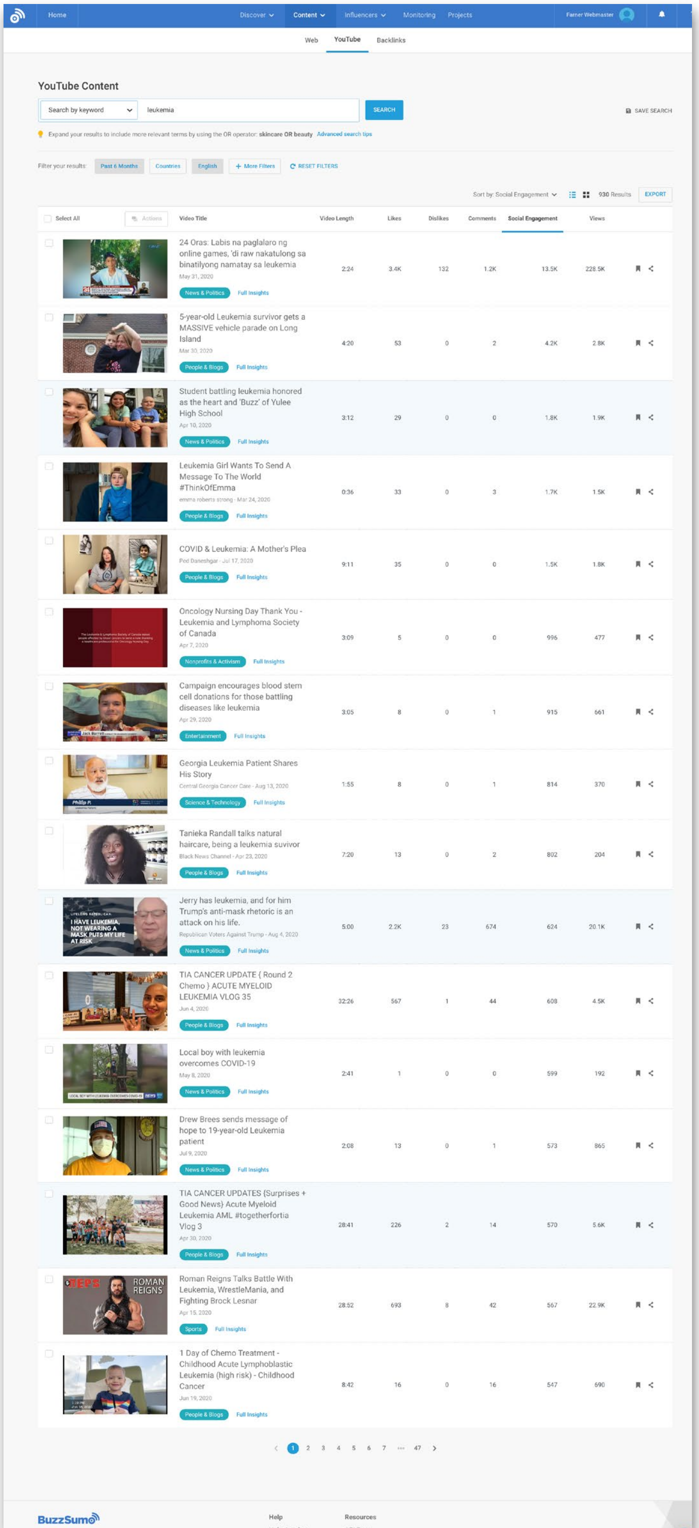
If you only look at what journalists focus on, you only see half the story. You also need to know which aspects of a topic engage people the most, people whom you want to move to a desired action.

- What content about the topic do they engage with (like, comment, share)?
- What questions and discussions do they have in forums, blogs and boards like Reddit?
- What postings do they publish around a topic on Twitter, Facebook, etc.?

To analyze what content about a topic engages audiences the most, leverage tools like *BuzzSumo*.
Here's a look at the most engaging stories around leukemia in the last six months

Screenshot: most engaging content pieces around leukemia – last 6 months – global.
Source: BuzzSumo.

You can also do this specifically for video content – e.g., the most engaging YouTube content for any given topic:



Screenshot: most engaging YouTube videos around leukemia – last 6 months – global. Source: BuzzSumo.

You can also use a tool like *Answer the Public* to get quick insights into the specific questions on which users search online related to the topic. Here are the results related to leukemia:

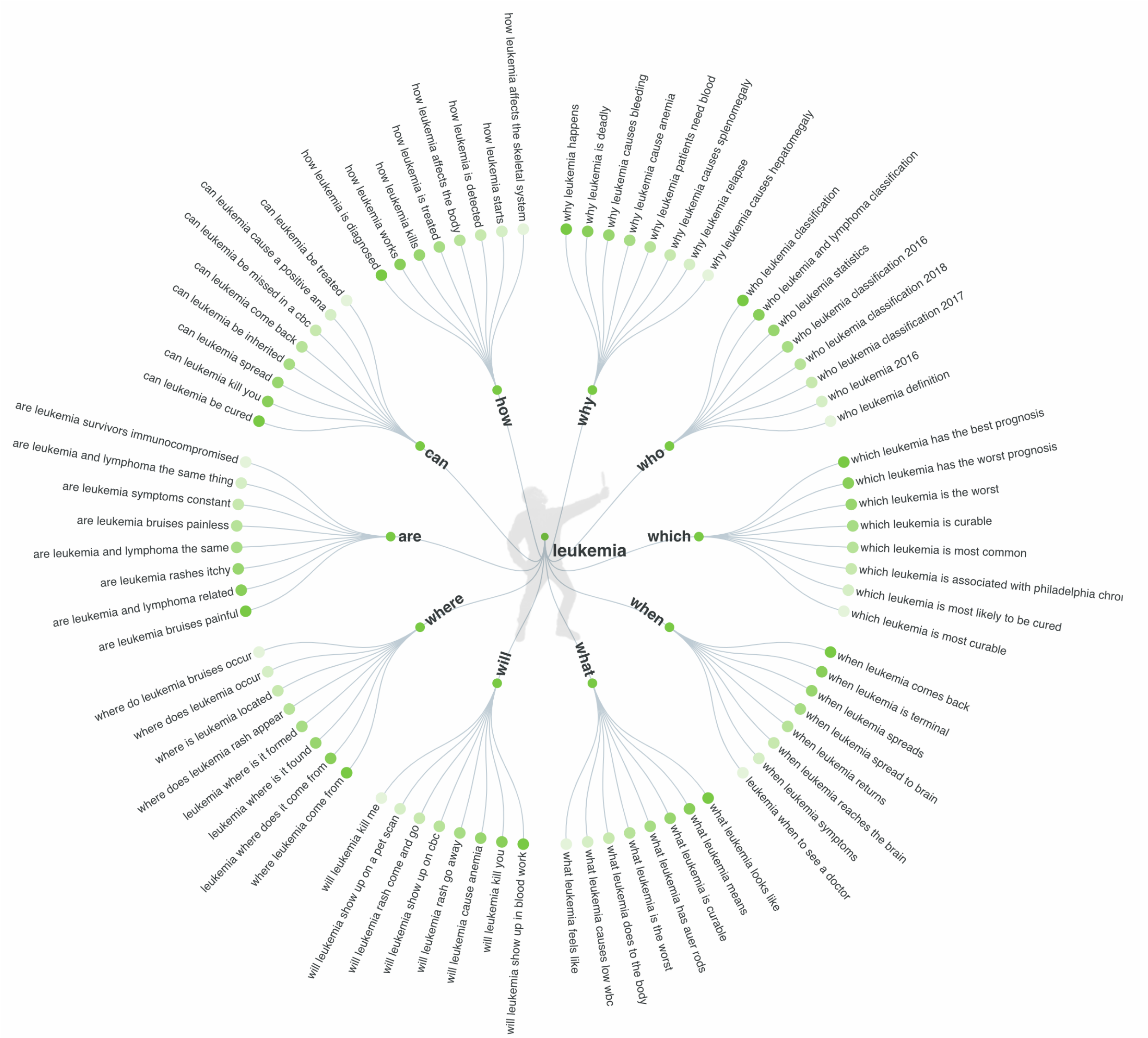


Image: Long form questions related to leukemia users in the USA search for via Search Engines.
Source: Answer The Public.

One reason AnswerThePublic.com is so useful and engaging is that the data is not just presented as a list but is visualized in a way that makes sense of it.

It clusters hundreds of Google searches into:

1. Questions (why, which, who, where, when, etc.);
2. Comparisons (vs, or, like, etc.); and
3. Prepositions (with, without, for, to, etc.).

This grouped view helps you quickly understand the key questions, worries and thoughts consumers face on their decision making journey in a specific topic.

And BuzzSumo has a neat feature that combines the most engaging content with key questions – and clusters the data in "sub-topics":

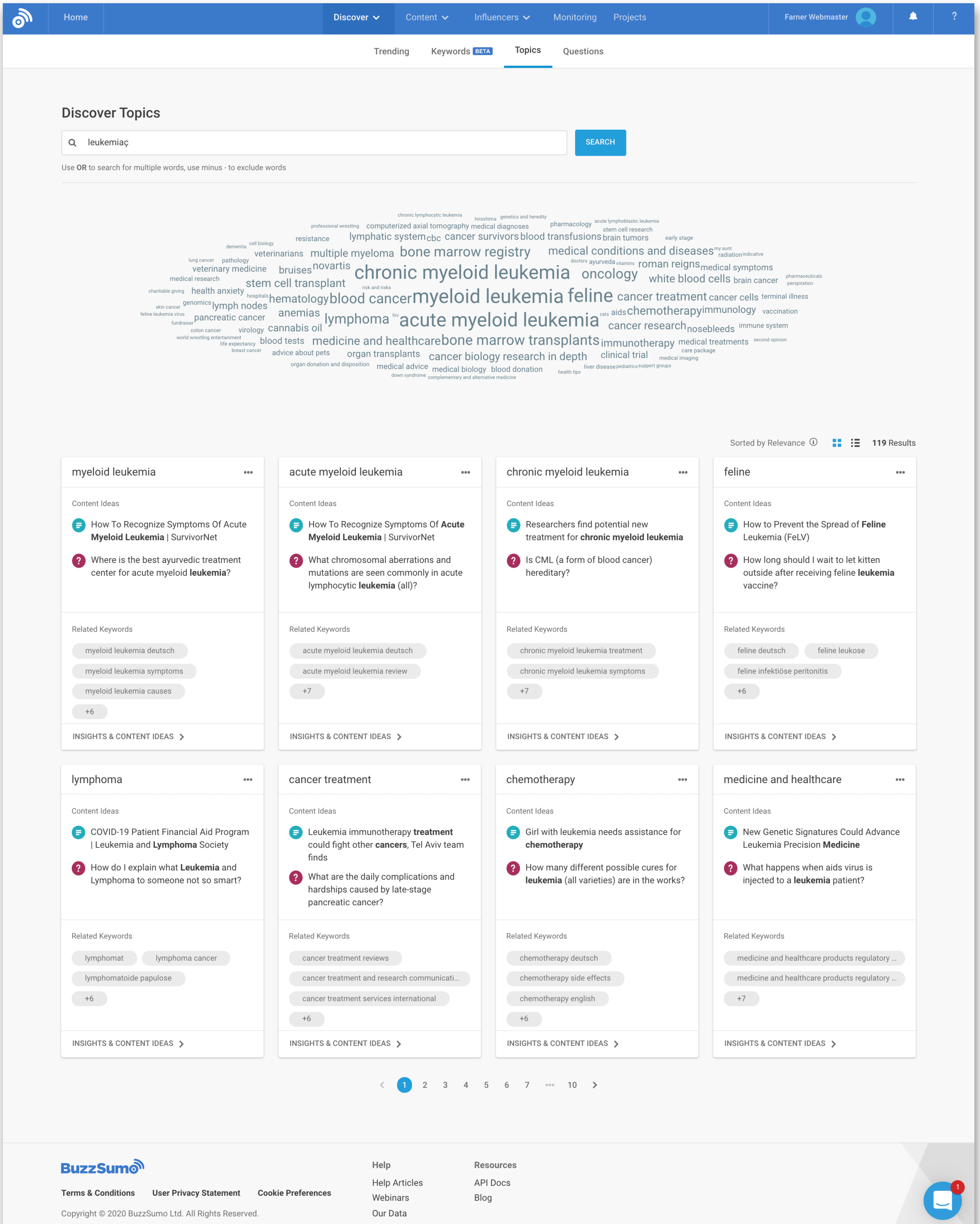


Image: Engaging content and key questions that users have around the topic of leukemia.
Source: BuzzSumo

4.1.3 SEARCH DATA: UNDERSTANDING HOW PEOPLE RESEARCH TOPICS ONLINE

When users enter the **BELIEF** stage in any given topic, they start doing research via Google and other search engines. Analyzing what people search for in a topical area provides heaps of insights that can be directly translated into content ideas. For many topics you will find thousands if not millions of search query variations that people research. The key then is to cluster these searches into topically similar searches and try to map these clustered searches on the journey.

To return to the car-buying example from Chapter 1 (link), one may begin research in the **BELIEF** stage by searching for "crossover SUV" or "minivan," or perhaps "crossover SUV vs. minivan." This addresses the early question, What type of vehicle is right for me? Once that decision is made, one might then search for "best crossover SUV" or "crossover SUV reviews." With more research done, they may then begin searching vehicle makes and models by name.

For clustering searches into topical categories, a lot of the best search-engine optimization (SEO) tools like ***SearchMetrics, Semrush*** and ***Moz*** already have machine learning-powered features. They will provide a first clustering proposal. However, most of the time this clustering is not very accurate or is too general to provide very actionable insights.

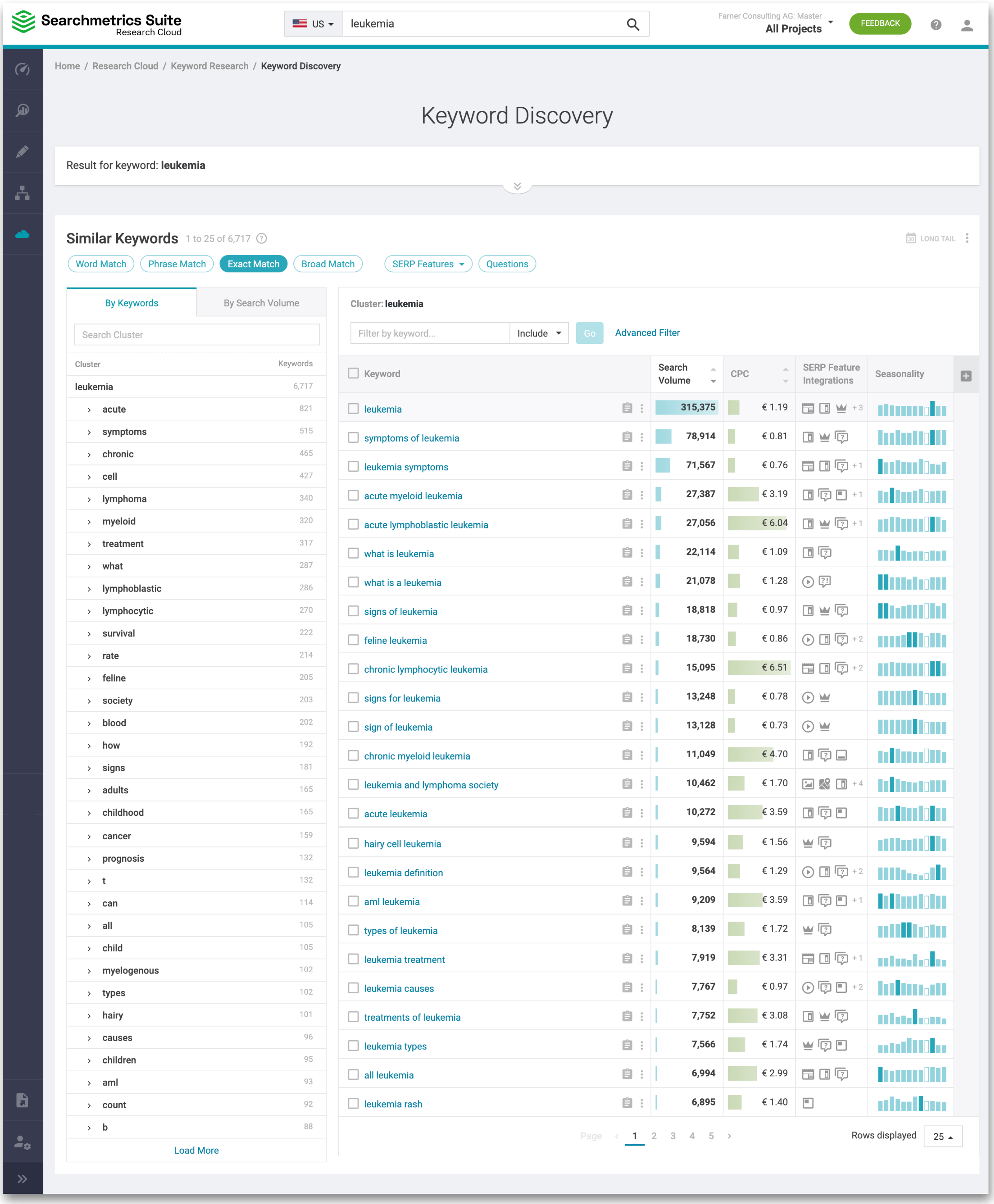
For mapping clustered searches on the journey, your knowledge of your topic area and your consumers is blended. There is currently no good tool on the market that will completely automate this for you.

On the below screenshot from SearchMetrics you see that in the U.S. there are 6,427 search variations that users search for every month. You see that the top keyword "leukemia" is being searched for 286,311 per month (search volume) and that the cost-per-click (CPC) for placing a Google ad on these keywords is €1.19.

On the left side you see the Clustering that SearchMetrics Machine Learning is doing. Within all keywords (6,427):

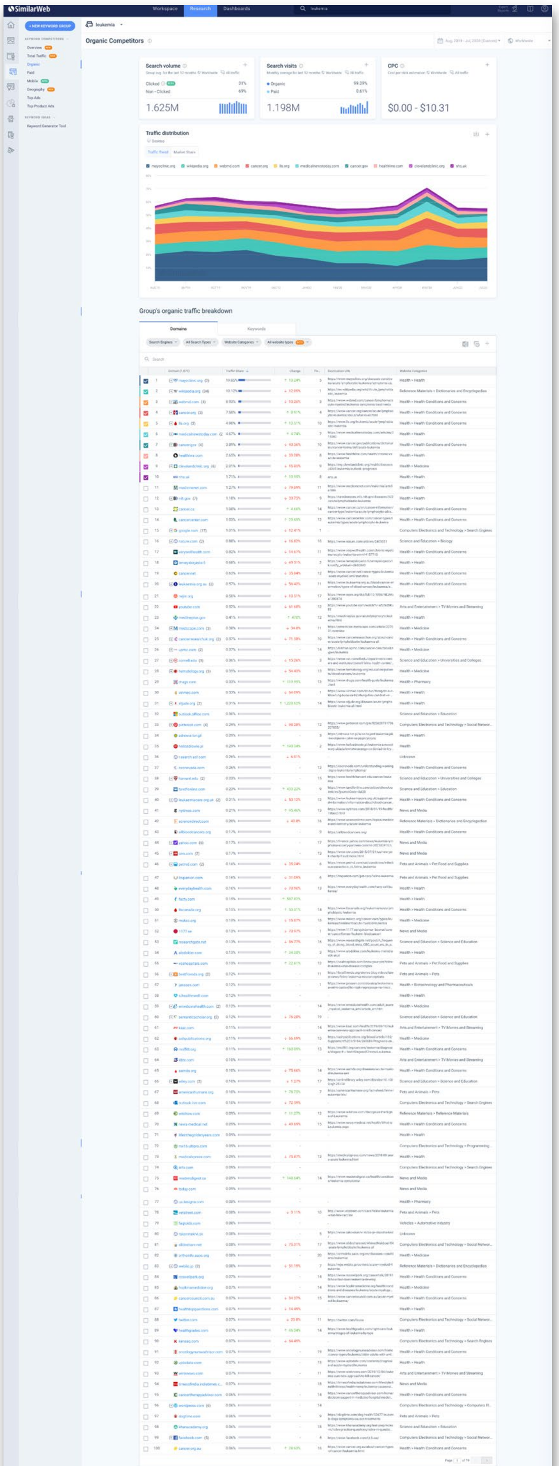
- 797 are searches that include the word "acute"
- 506 are searches that include the word "symptoms"
- 451 are searches that include the word "chronic"

Searchmetrics also shows you seasonality patterns – some of which may not be obvious. For example, in October there is a significantly higher level of searches for leukemia than in any other month, although official leukemia and child cancer awareness month is not October but ***September.***



Screenshot: What do Americans google for related to leukemia? And how often?
Source: SearchMetrics.

4.1.4 TRAFFIC DATA: UNDERSTANDING HOW PEOPLE BEHAVE ONLINE

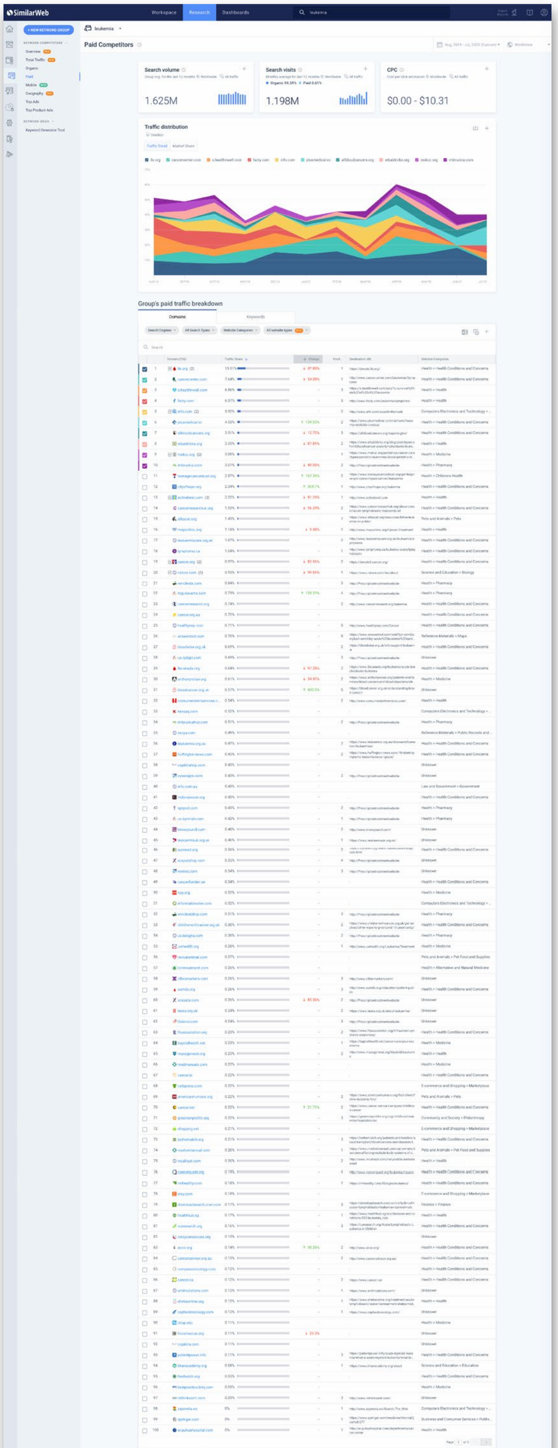


Screenshot: The top websites getting most of the organic search traffic when users search for the top 200 leukemia keywords. Source: SimilarWeb

The last data category is traffic data. There are many tools that allow you to analyze what websites and players in a market get website traffic, how much traffic, and even more interestingly, from where it comes.

Tools like ***SimilarWeb*** or ***JumpShot*** allow you to do just that. A panel of consumers opt in to be tracked across the websites and apps they use. These tools are not 100% accurate, but they can give you directional and comparative insights. You see the difference in accuracy when you compare SimilarWeb traffic for your own website with your own Google Analytics data. But the purpose of these tools is not to replace your own Google analytics. Instead, it is to give you directional competitive insights that you simply cannot get in any other way.

So, what next? Try combining the search data with SimilarWeb data to mirror a "topic market" and see what players get the most traffic. For example, if you were to copy and paste the top 200 most searched keywords related to "leukemia" (identified via SearchMetrics) into SimilarWeb, you could find a useful market share overview for the websites that get the biggest part of the traffic for these searches. Not only do we know what people search for, but we also know what they'll see after that.



Screenshot: The top websites getting most of the paid search traffic when users search for the top 200 leukemia keywords. Source: SimilarWeb

Knowing where consumers will go and what content they will see is a big plus. Based on this you can develop successful content for your own campaign. And you'll also gain insight into which brands and/or websites you might target for earned media, advertisements or partnerships.

Another interesting option is to look at the same data from a "paid search" perspective. Who is buying Google ads to get a piece of the "leukemia" traffic? This data is key to understanding the competition in your topic space or niche.

Of course, there are other more "traditional" methods, like surveys, to get insights into your audience's wants, needs, beliefs and behaviors. But note that search and traffic data do not have social desirability bias. In other words, it's what people actually do, not what they say they think or do. And it's far less expensive and much faster.

4.2 What data to leverage to create an automated journey campaign that delivers the right content to the right users depending on their stage in the journey.

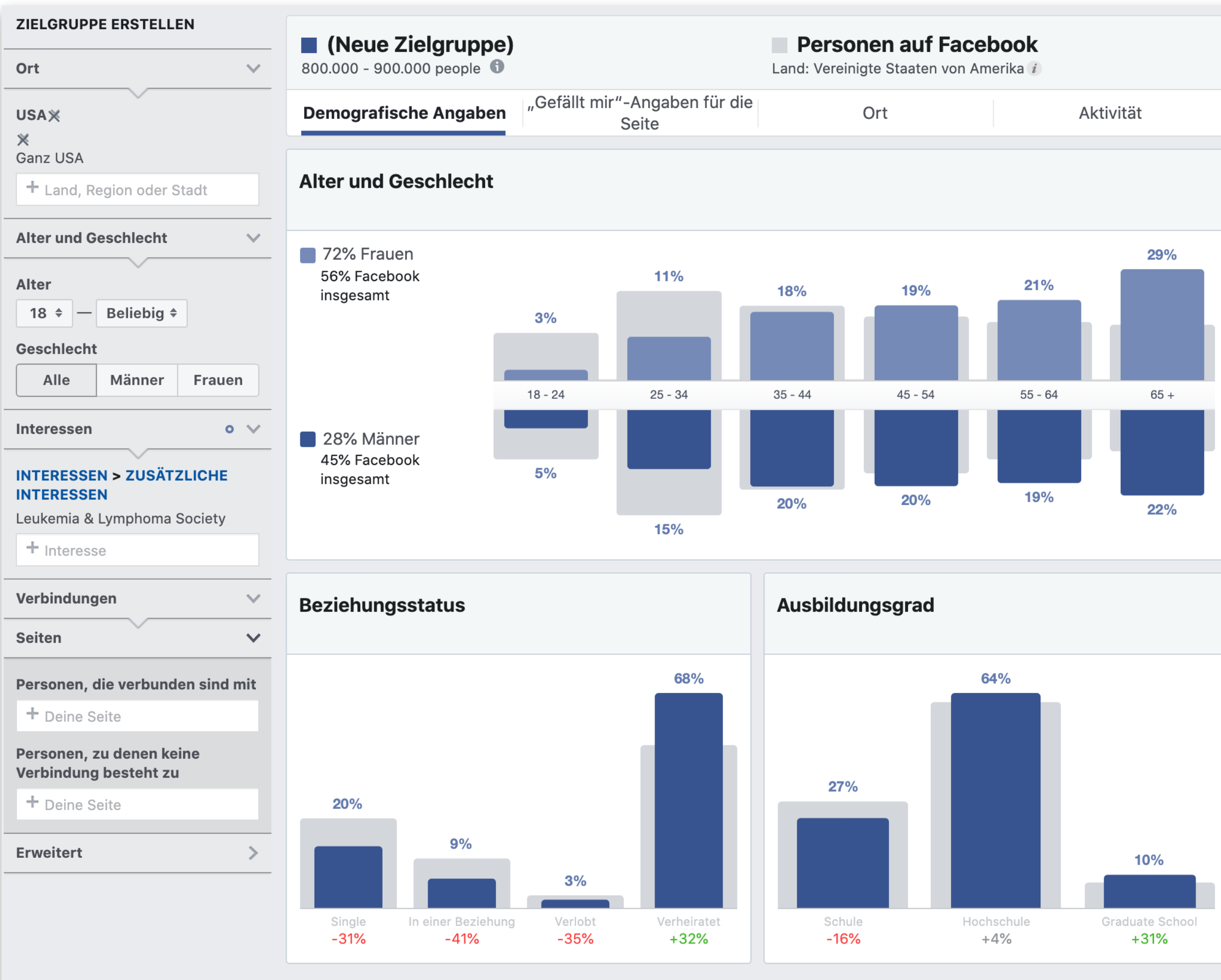
Consideration Stage	Audience criteria	Targeting	Objective	Storyline[5]	Channels	Data
INTEREST	People who already gave a regular blood donation[6] OR people who have a personal interest in Leukemia.	**Behavior targeting:** · custom and lookalike audiences based on people who donated regular blood · custom and lookalike audiences from website visitors to pages on blutspende.ch that cover regular blood donations · followers of the Swiss blood donation organization's social media channels · content engagers on social media – people who frequently engage with content published by the Swiss blood donation organization on social media · lookalikes of people who signed up to become blood stem cell donors in this campaign **Interest targeting:** · people interested in blood donation · people interested in leukemia and other cancer topics	Visibility	Leukemia can afflict anyone. Only a blood stem cell donation helps.	Facebook & Instagram ads	Targeting Data from Advertising Platforms like Facebook, Google, Twitter, LinkedIn etc. In this stage of the journey focus on: · demographic data · interest data · custom data (pixel-based, CRM-based etc.)

5 These are not the exact messages in the social ads, but they define around what key storyline messages have to be crafted.
6 The hypothesis was that people who already donated blood are more likely to be open to considering blood stem cell donations.

Consideration Stage	Audience criteria	Targeting	Objective	Storyline[5]	Channels	Data
BELIEF	People who are actively researching how they can personally engage in the fight against leukemia.	**Behavior targeting:** · people who engaged with SEE ads (and thus signaled interest) · custom and lookalike audiences of website visitors to specific "blood stem cell" related pages on blutspende.ch **Interest targeting:** · people who visited sites, used apps or searched keywords around leukemia and blood cancer	Consideration	This is how the blood stem cell donation takes place, explained step by step. Campaign copy: Luca 1 – Leukemia 0. Thanks to a blood stem cell donation Luca is back in school and enjoys being a child	Facebook & Instagram ads Google ads (Search ads)	Search Data from Google / Bing etc. (What do people search for?) Interest Data from Facebook, Google, LinkedIn, Twitter and others. What sites and/or apps do they visit, what videos do they watch etc.? Engagement Data from your website and apps: What topically focused content on our website/ in our apps do they engage with the most? Engagement Data from our digital ad campaigns: what ads do they view, click, comments, like etc.?
ACTION	People who are actively researching how a blood stem cell donation works and how to become a donor.	**Behavior targeting:** · people who engaged with THINK ads (and thus signaled interest) **Interest targeting:** · people who visited sites, used apps or searched keywords around blood stem cell dona-tions	Conversion	Donate blood stem cells and save lives. Copy: Not quite ready to become a blood stem cell donor? Subscribe to our newsletter and follow us and other committed people in the fight against leukemia.	Facebook & Instagram ads Google ads (Search ads)	Search Data from Google / Bing etc. (What do people search for? Interest Data from Facebook, Google, LinkedIn, Twitter & Co: What sites, apps do they visit, what videos do they watch etc.? Engagement Data from your website & apps: how do they engage with product/service/call to action focused content on your website/in your apps? Engagement Data from your digital ad campaigns: what ads do they view, click, comments, like etc.?
CONFIDENCE	People who registered as a blood stem cell donor.	**Custom targeting:** · people similar to those who signed up as donors in the campaign	Advocacy	Message; You are a hero. Do you also have heroes who want to get involved in the fight against leukemia among your friends?	Email	Engagement Data from our email marketing activities: what emails do they open, what links do they click etc.?

The best way to get firsthand experience with Facebook's targeting capabilities is to play around with its *audience insights tool.* Let's explore what you can do with it.

The audience insights tool will enable you to quickly check how many people you will be able to target with ads via Facebook, Instagram and Facebook Messenger based on specific demographics and interests. The screenshot below shows that in the U.S. you can target 900,000 – 1 million users with an attributed interest for "Leukemia & Lymphoma Society" – and you'll also see that the audience for this topic is 75% female and 25% male. You'll also get age breakdowns and many more insights that will help you define your targeting strategies in the **INTEREST** and **BELIEF** phases of your campaign.



Screenshot: Insights into audience targetable via Facebook, Instagram and Messenger.
Source: Facebook Audience Insights

With this kind of data analysis you will be able to create communications and marketing initiatives that will get your audiences from seeing your content to actually doing what you want them to do.

Chapter 5

Leveraging experimentation & optimization

5. LEVERAGING EXPERIMENTATION & OPTIMIZATION

As mentioned in the case study in Chapter 2 and throughout the entire beginner's guide so far, it is not enough to just define a journey, set up the campaign and the watch the results come in.

Once the campaign goes live, A/B testing and systematic experimentation starts. This is actually the work that separates amazing campaigns from merely good ones.

Along the journey you have several touchpoints and optimization levers:

Consideration Stage	Audience criteria	Targeting	Objective	Storyline[7]	Channels	Testing
INTEREST	People who already gave a regular blood donation[8] OR people who have a personal interest in Leukemia.	**Behavior targeting:** · custom and lookalike audiences based on people who donated regular blood · custom and lookalike audiences from website visitors to pages on blutspende.ch that cover regular blood donations · followers of the Swiss blood donation organization's social media channels · content engagers on social media – people who frequently engage with content published by the Swiss blood donation organization on social media · lookalikes of people who signed up to become blood stem cell donors in this campaign **Interest targeting:** · people interested in blood donation · people interested in leukemia and other cancer topics	Visibility	Leukemia can afflict anyone. Only a blood stem cell donation helps.	Facebook & Instagram ads	Ad testing on Facebook, Google, Twitter and LinkedIn

7 *These are not the exact messages in the social ads, but they define the key storyline messages should be crafted.*

8 *The hypothesis was that people who already donated blood are more likely to be open to considering blood stem cell donations.*

Consideration Stage	Audience criteria	Targeting	Objective	Storyline[7]	Channels	Testing
BELIEF	People who are actively researching how they can personally engage in the fight against leukemia.	**Behavior targeting:** · people who engaged with SEE ads (and thus signaled interest) · custom and lookalike audiences of website visitors to specific "blood stem cell" related pages on blutspende.ch **Interest targeting:** · people who visited sites, used apps or searched keywords around leukemia and blood cancer	Consideration	This is how the blood stem cell donation takes place, explained step by step. Campaign copy: Luca 1 – Leukemia 0. Thanks to a blood stem cell donation Luca is back in school and enjoys being a child	Facebook & Instagram ads Google ads (Search ads)	Ad testing on Facebook, Google, Twitter and LinkedIn Website and landing page testing
ACTION	People who are actively researching how a blood stem cell donation works and how to become a donor.	**Behavior targeting:** · people who engaged with THINK ads (and thus signaled interest) **Interest targeting:** · people who visited sites, used apps or searched keywords around blood stem cell donations	Conversion	Donate blood stem cells and save lives. Copy: Not quite ready to become a blood stem cell donor? Subscribe to our newsletter and follow us and other committed people in the fight against leukemia.	Facebook & Instagram ads Google ads (Search ads)	Ad testing on Facebook, Google, Twitter and LinkedIn Website and landing page testing App testing Login area testing
CONFIDENCE	People who registered as a blood stem cell donor.	**Custom targeting:** · people similar to those who signed up as donors in the campaign	Advocacy	Message; You are a hero. Do you also have heroes who want to get involved in the fight against leukemia among your friends?	Email	App Testing Login Area Testing

Ad testing

All the big digital ad platforms like Facebook and Google provide robust A/B testing features. On Facebook you can easily run *split tests* or *dynamic creative* tests that will generate statistically significant and reliable measurements of what content works best and with which audience.

You can run A/B tests on many different *variables* and objectives. Just make sure that you run one test after the other so you avoid one test interfering with the other and compromising the validity and clarity of your data.

Website and landing page testing

As soon as you get traffic to your landing page you should also A/B test different landing page versions. You may experiment with everything from copy to photography to link placement, all aimed at optimizing performance of the page in terms of driving people further down the journey.

There are many tools that allow you to run such tests. Two trusted leaders in that space are *Optimizely* and *VWO.*

We know that in big companies it's often impossible to run such tests on the main website platform. This is where lean and agile landing page tools come in handy. The two leaders in this space are *Unbounce* and *LeadPages.* They offer A/B testing for their landing pages baked right in.

Email testing

Email A/B Testing has been around for decades, and it is still one of the most proven experimentation tactics to get more conversions out of your leads or customers. From *Mailchimp* to *Sendgrid* to almost any big SAAS-powered email marketing suite, all offer A/B testing capabilities.

A/B testing and experimentation is a field of practice all its own. If you want to learn more on the subject we recommend the following three resources:

- *Making Websites Win* – an essential read for testing websites and anything else
- A whitepaper by Optimizely on how to get started with A/B Testing & Experimentation (download in exchange for your email *here*)
- Stop Guessing and Start Experimenting – a guide by Forrester that you can download *here*

Chapter 6

Leveraging technology

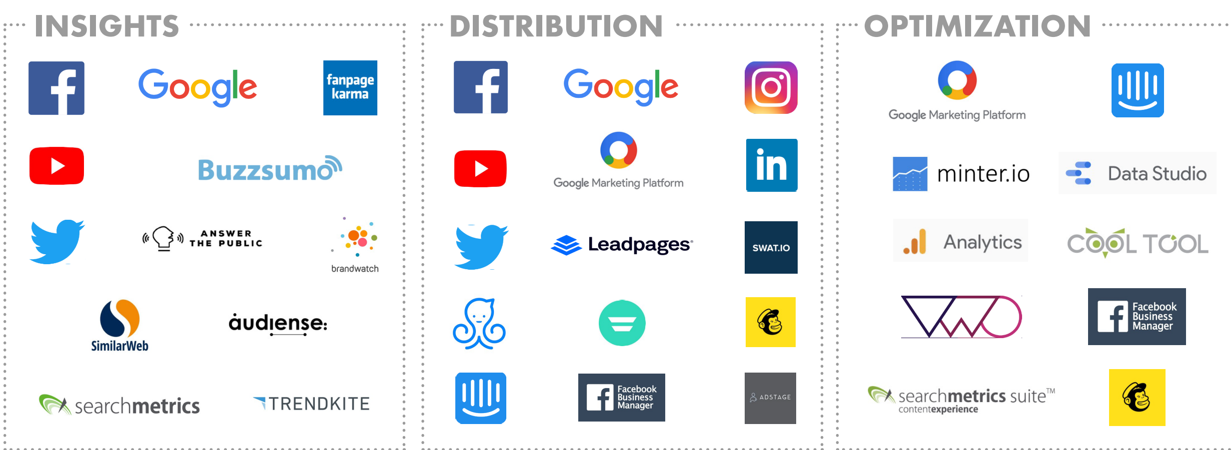
6. LEVERAGING TECHNOLOGY

One thing must be clear by now: There's no CommTech without tech. You need to leverage technology to shift to the CommTech approach to communications.

Technology can help with a lot of things, but you need a clear strategy, clear frameworks and processes. Without these, no tool or tech solution will create much value for your marketing and communications.

We're also aware that most companies already have various tools and technologies in their "stack." That's one reason why there is no universal formula for how to build the perfect CommTech stack. Each organization is different, with its own systems. Ultimately CommTech needs to work with your systems and it needs to cover your biggest needs. Start by defining clear criteria for assessing tools and technologies and, above all, develop specific use cases.

Here are some popular tools that can help with different elements of CommTech:



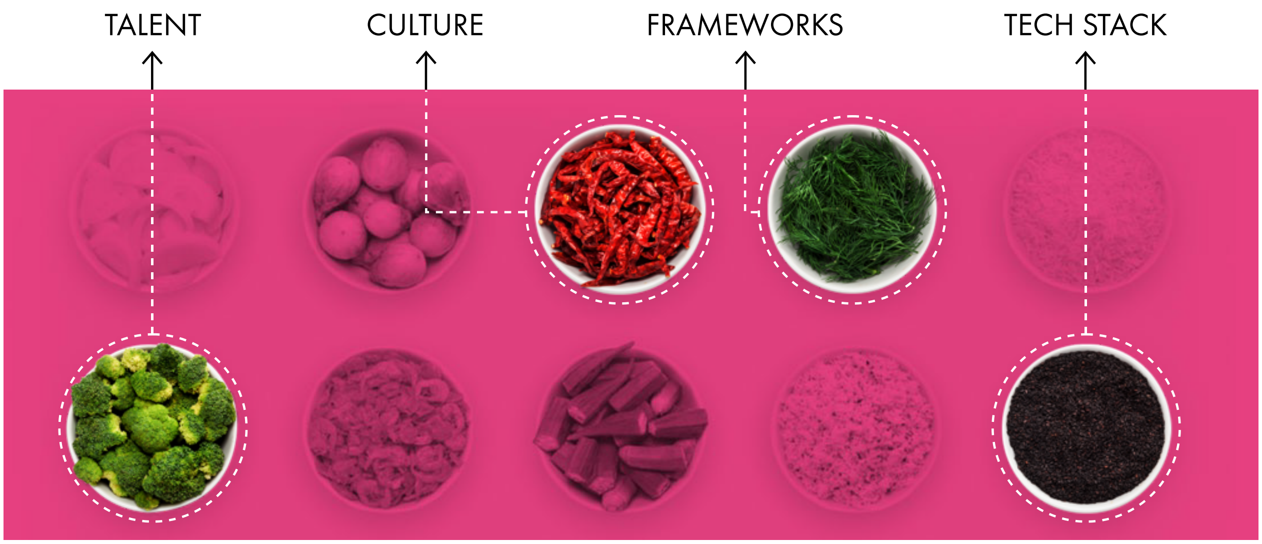
ILLU: possibly shape this to match rest of UX

Chapter 7

Building & running CommTech Teams

7. BUILDING & RUNNING COMMTECH

THE KEY INGREDIENTS **OF OUR TEAM**



ILLU: make this match UI?

Moving to CommTech also has three key implications for your team:

- First is that you will need new kinds of talent and skills, either by acquiring new people with expertise or training existing teams to be fluent with CommTech. Likely it will be a combination of both.
- Second is that you must reevaluate your team's processes, including how information is shared and how decisions are made. CommTech demands nimble, empowered teams that can act with autonomy based on a prescribed system of understanding data and acting upon it.
- This leads to the third area: team culture. In what ways can you foster a mindset of constant innovation and risk-taking? How can you shift from the conventional practice of letting experience guide decision-making and fully embrace data as a driving factor? What does it mean to operate in real time, and how must accountabilities shift to allow for that? These are all aspects of culture that must be addressed.

7.1 What profiles do you need?

What are the key profiles you need to build a good CommTech team? Just as with tools, there's no one-size-fits-all answer to that question. But when your team has talent and expertise in the following areas, you should be well equipped to make the transition:

Image: expert profiles that will help to build a strong CommTech team. Make this match UI?

7.2 What processes do you need?

Once you have the right talent mix, you will need to evaluate processes. There are a couple of bigger shifts involved:

- From silos to collaboration
- From waterfall processes to Agile project management

It also helps to have a clear process blueprint for the Agile development and management of communication and marketing projects. Here's a process applied by one of our most savvy CommTech partners:

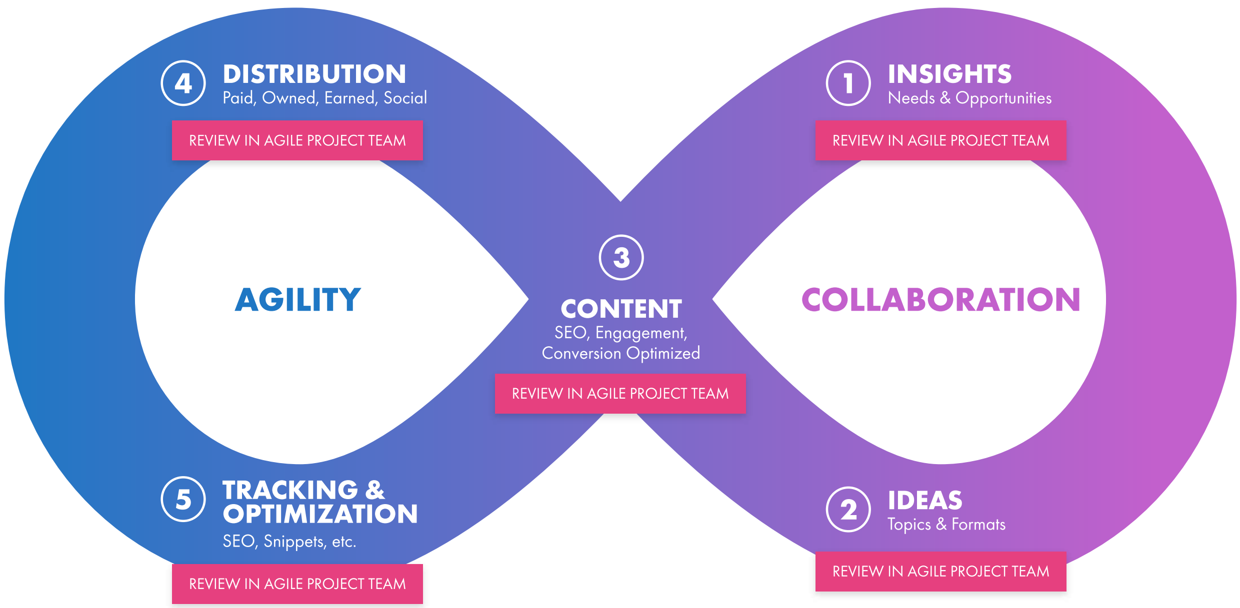


Image: An Agile process applied by CommTech savvy teams. Make this match UI?

7.3 What culture do you need?

Here's the hardest part. To fully switch to CommTech you need to nurture and scale the right culture.

If your team fully embraces a commitment to experimentation and testing, they will need to move away from "always knowing the answer" to become the "best questioners." This is especially hard in areas where people build their identities on expert status. Communication and Marketing teams are made of such experts. That's' why we know that getting the CommTech Culture in your team is the hardest part, but it's also the most sustainable one.

Across the board there are a few core values that will help build a world class CommTech team culture. They are:

Image: make this match UI?

We are curious. We want to know and understand things at a deep level. We want to learn every day and become better. Collecting, making available and sharing knowledge is a key function of the CommTech communicator. Key attributes include the ability to:

- Analyze complexity and recognize the essentials
- Be inquisitive, to understand new technologies, to apply them and use them as a means of empowerment
- Understand change as an opportunity and approach it with an open attitude
- Stay nimble, react quickly and anticipate the pace in our markets
- Know about people, issues, markets and the social and political context
- Use all this knowledge to the benefit of our work.

As relationship experts we need to understand how society works and what the relevant drivers behind behavior are. **As communication professionals,** we are open-minded and combine the existing with the new; new disciplines and job profiles (analysts, data visualizers, behavioral economists, anthropologists, community experts) will be necessary to master complex communicative tasks. As **analysts,** we must filter the noise out of an increasingly complex environment.

A careful process is a prerequisite for this; it brings us the relevant insights and lets us get to the communicative drivers. The ongoing commitment to improvement is essential. At the same time, we must continue to master the conventional while constantly learning new things.

We are empathic. We are committed to our topics and the people behind them. We represent the concerns of our stakeholders/enterprises with conviction. We stand by our values. We understand how to continuously put ourselves in the shoes of our stakeholders.

We are honest. We deal with information honestly and with good intention and convey an accurate picture of the values, ideals, activities and intentions of our organizations. We understand and live our values and recognize the contribution of our work to organizations, brands, people's lives and society.

Despite all the discussions about "fake news," the truth remains the basis for credibility and is the essence of trust. In our work as communication experts, we are committed to true content, because the opposite destroys trust, even in our work.

We are mindful. We listen attentively and respond to arguments. We take different perspectives into account.

An important prerequisite for a trusting relationship with our customers and stakeholders is that we understand the customer relationship in its entirety. The tasks that our internal and external stakeholders have asked us to perform have become too complex to be handled with a single perspective.

We are courageous. We have the courage to express our opinions and make each other think. We are ambitious, want to achieve goals and are not satisfied with the first best solution. We are looking for creative excellence and radically relevant content, because everything else is ignored.

We are impactful. We simplify complexity for our internal and external stakeholders and create perceived added value. We do this at the lowest possible cost. We analyze what we spend our time on and whether this creates added value for our stakeholders and/or the organization. We are constantly looking for the perfect interplay between efficiency and the highest quality standards in our own work.

Chapter 8
Relationships, Ethics and Budgets

8. RELATIONSHIPS, ETHICS AND BUDGETS

Communications has always been fundamentally about two things: content and relationships.

As we noted in the introduction, content campaigns represent one of several possible communications triads, which comprise emergent technologies, skills and methods. We've discussed many new capabilities that you and your team can master – hyper-personalization, social triggers, journey maps, paid promotion, Agile methods and more. Mastering these will enable your organization not only to shape perception, but to build the beliefs that culminate in action.

As to building relationships, content-based journey maps may not necessarily apply directly. Try drawing up a list of the 20 people most important to your firm's future – from the CEO to a key beat reporter – and see whether you agree that content campaigns are not what matters most in forging and maintaining those relationships. And yet even these intimate and high-value relationships can be improved by the savvy deployment of CommTech tools and methods. For example, keeping track of our interactions with an Influencer Management tool can add depth to our memory about what matters most to him or her and improve mutual trust.

That word – trust – is important. In a world of proliferating stakeholders, increasingly complex economic and social systems and the weaponization of technology and data, trust is becoming an ever more precious commodity. The technologies meant to connect the world and improve our understanding of it – the internet, social media, and improved data and system intelligence – have often been turned on their heads by malicious actors, negligent proprietors and winner-take-all market dynamics.

It doesn't have to be like this – and our profession can lead the way, if we are attuned to both the benefits and perils of personalization, the threat of benign neglect, the insidious partiality of algorithmic bias, the dynamics of information bubbles and the simple carelessness of unwittingly revealing private information to customers.

Among our responsibilities is to become experts in the use of promising new technologies. For example, one bright light may be the blockchain's ability to create a public ledger of who created a particular piece of content. Could this be the antidote to deepfakes and other forms of malicious content? Take a look at https://content-blockchain.org/. Comms teams will have to understand when the tipping point of this technology arrives, possess the skills to make use of it and understand how to integrate it into their habits, working rituals and team culture. The same applies to virtual/augmented reality, AI-driven chats and other interactions, and other emergent, disruptive capabilities. Each will require thinking about the Triad of technology, skills and methods.

This isn't just a matter of theory or even behavior; it's also a matter of money. What percentage of your budget goes to CommTech today? A veritable army of SaaS vendors is clambering to get "just a moment of your time." Will you give it to them? On what basis will you make decisions about acquiring new tools, upgrading existing systems or building your own solutions with internal resources? Using the frame of the CommTech Triad, does a new tool represent a technology whose time has come? Do you have the skills to deploy it? And is your team open to new methods of working?

Even more practically, what percentage of your team's time is wasted contending with complexity? One exercise is simply to ask a representative sample of your team to list every tool they use throughout a single day – no matter how trivial – from email to spreadsheets to social media management tools to web-based graphics generators. You may be surprised by the clever diversity of approaches your team has devised (or depressed by the kludge of workarounds with which they contend each day). Either way, you will likely find that you are sitting on a CommTech stack already. The question now is whether it's working for you – or are you working for it?

Contact

Do you have a question to the CommTech Guide? Send us an e-mail: *contactus@page.org*