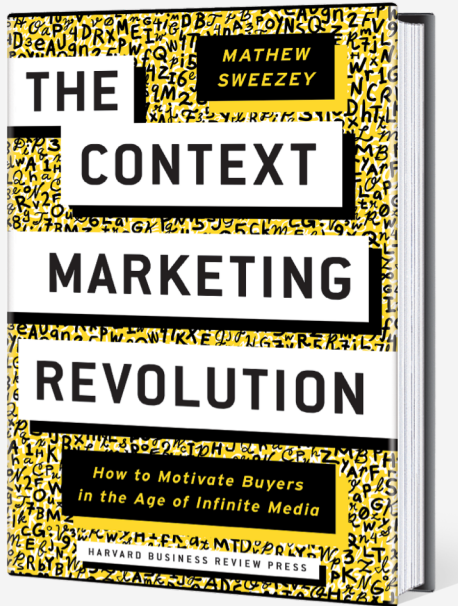


# How to Market in Troubling Times

How to Pivot, Maintain, and Build  
Brand In Unforeseen Situations

*“Change is the only certainty. Today is the slowest rate of change we will ever experience. And those who are the most adaptive to change stand the greatest chance to survival.”*

- Jonathan Macdonald



# Mathew Sweezy

Director of Market Strategy  
Salesforce

## Author:

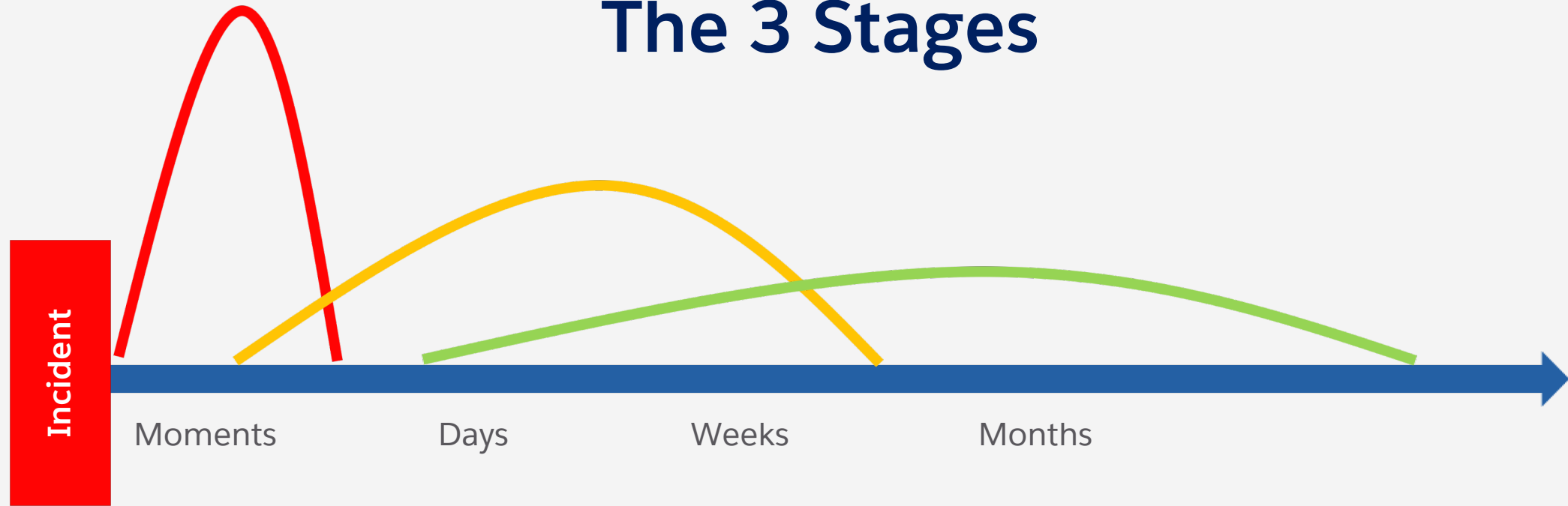
*Marketing Automation for Dummies* (Wiley 2013)

*Context Marketing Revolution* (HBR 2020)

# The Three Stages Of Turbulent Times



# The 3 Stages



**Phase 1:** The hit. This is the immediate response. This must be practiced to execute on short order.

**Phase 2:** The pivot. This is the pivot stage where existing plans changed and new short term goals set and executed against.

**Phase 3:** The recovery. This is the long term plan on how the brand is going to recover and get back to normal.

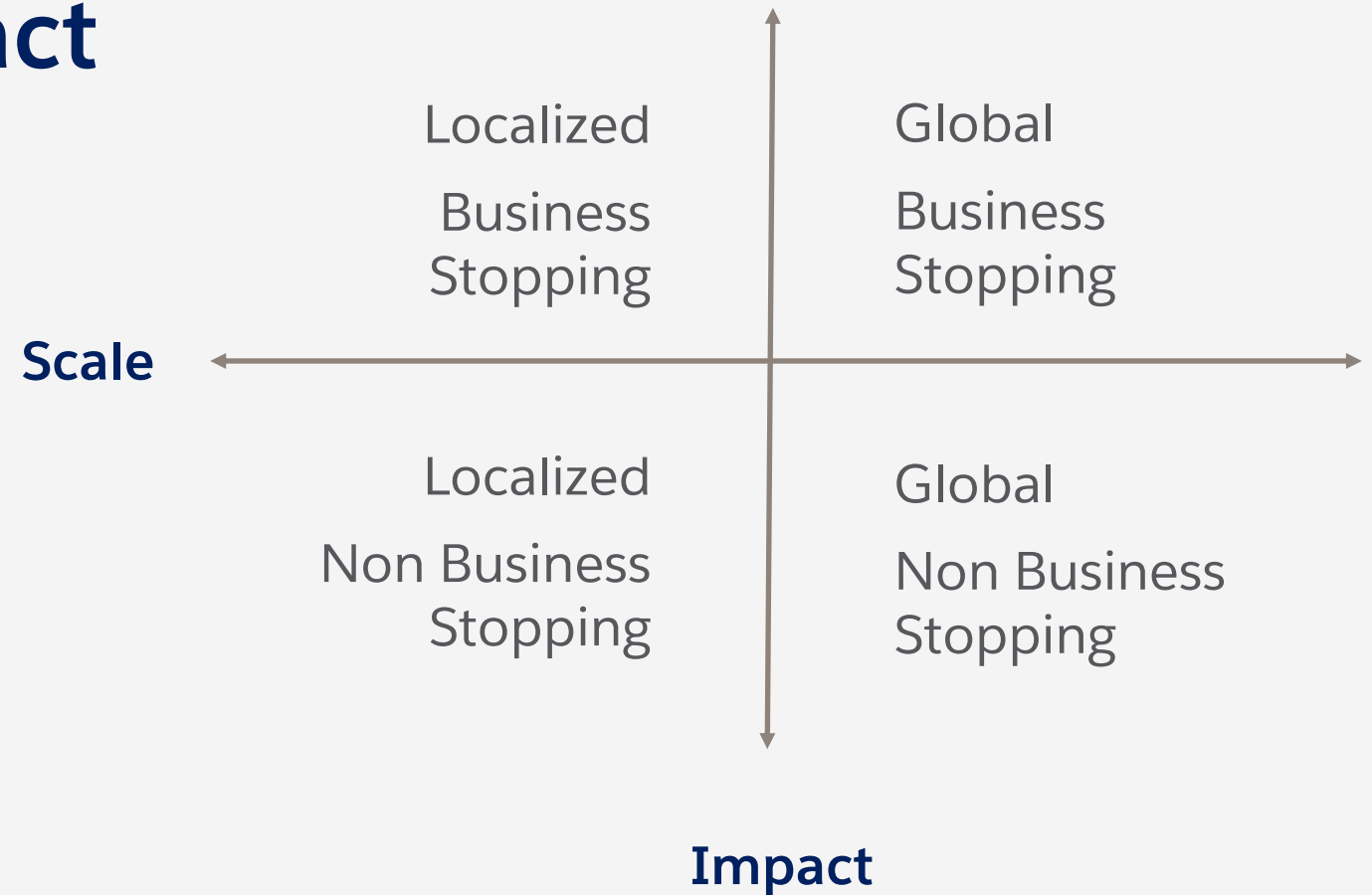
# Not All Situations Are The Same

Step one of responding is knowing what you are up against

# What is the Impact

When a situation arises you'll first need to know what type of a situation it is. This will dramatically alter how you respond.

A simple 2X2 can help you determine which situation you are in and what to do next.



# Some Examples and Where they Fall

Each of these is an unforeseen disruption to a brand but in a different way, requiring a different set of processes, procedures, and stakeholders.

When you are preparing use a scenario from each of these four categories to role play.

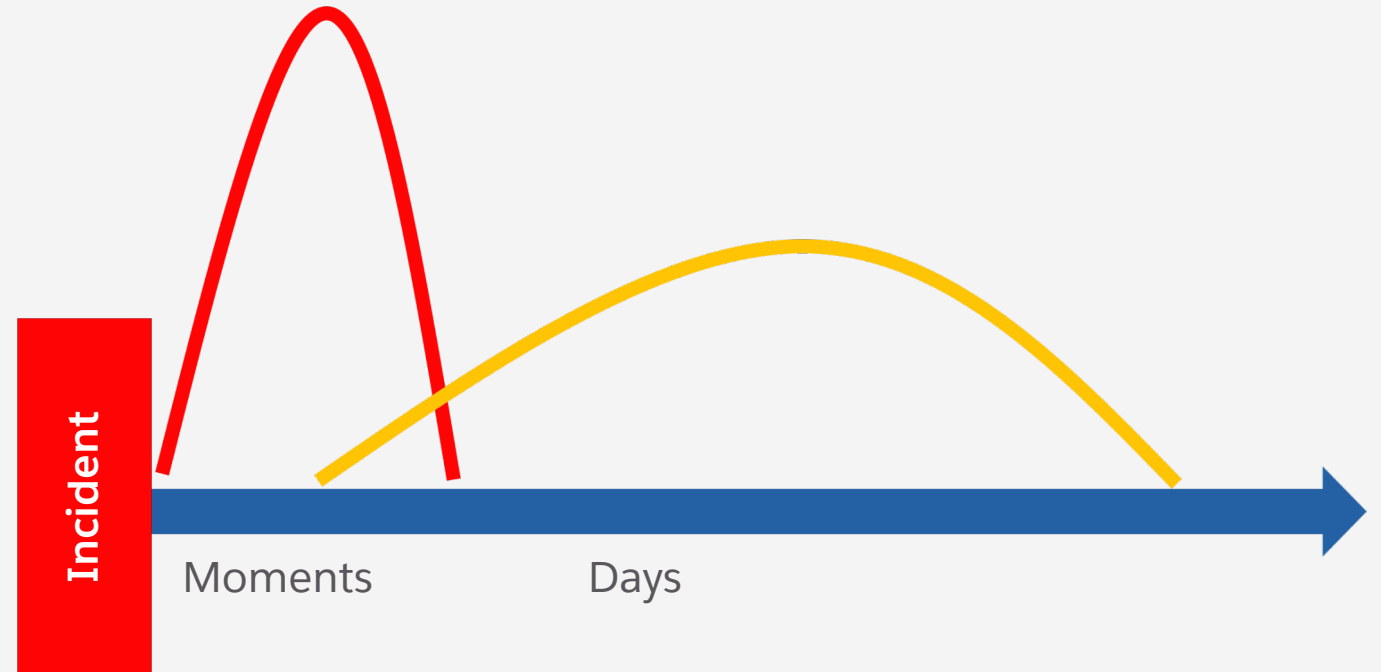


# Phase 1: Dealing With The Initial Impact

# Phase 1: First Moments

As soon as you are aware of a situation you must take action. This is critical in a world of social media as if you are not on top of the situation it will likely get out of hand and create a bigger situation.

Phase one lasts from the moment you learn of the situation and depending on the situation can last upwards of a week.

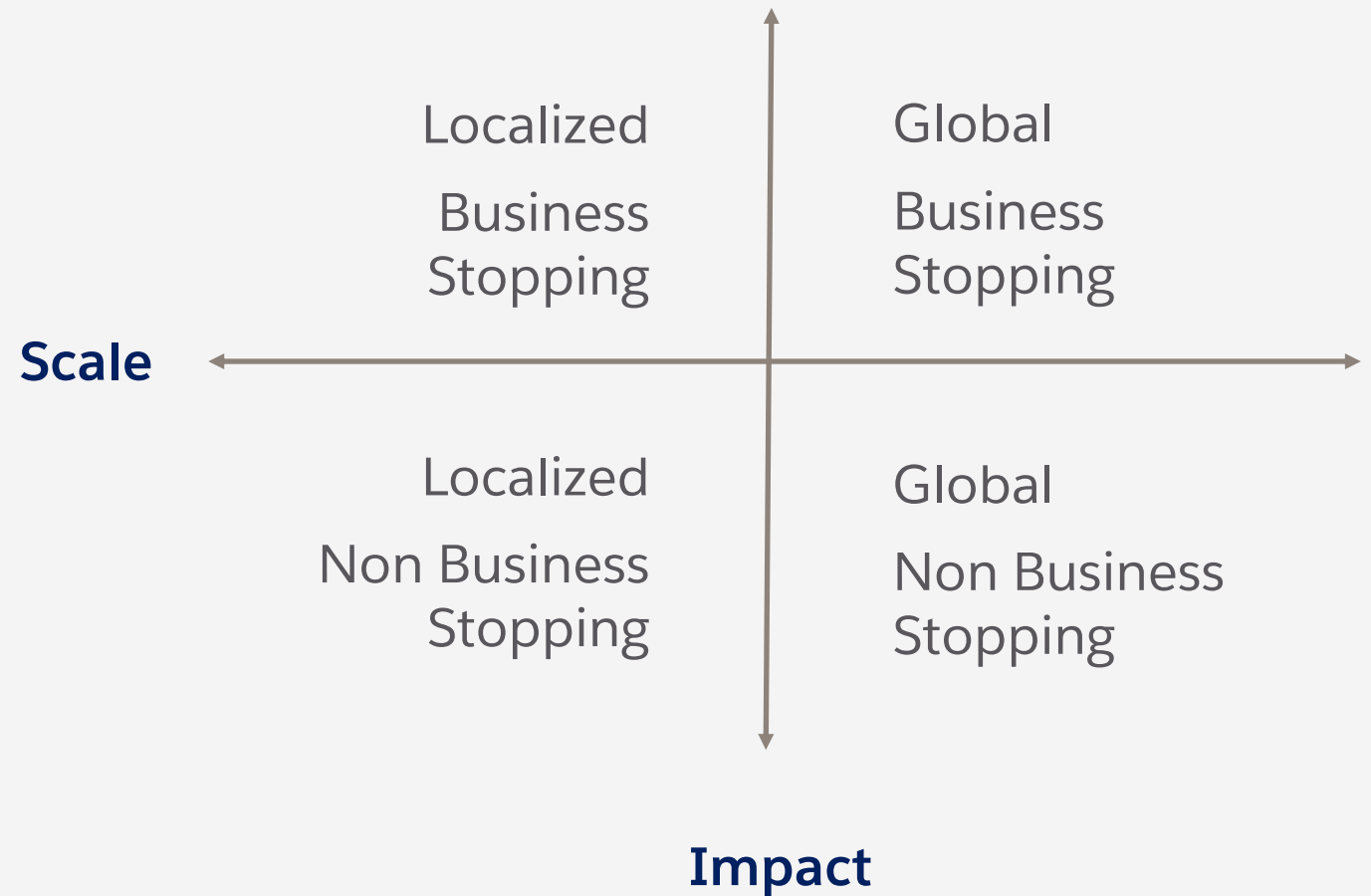


# First Assess the Situation

Determine which type of situation you are in. Also be aware if the situation is static or dynamic.

Identify the cause of the situation, and the affects on customers, stakeholders, and employees.

Engage key stakeholders depending on scope of situation.



# Next Establish Chain of Command

When scenarios that are unforeseen hit, traditional operational processes are often too slow to respond appropriately. New teams, and new chains of command are often necessary. This is difficult to do on the fly, and best if you have this determined and written down in a MCP or BCP.

- **Legal** – Depending on the situation you will need to engage different legal assets. Be sure to know who to contact ahead of time and how to engage them. What must legal review and sign off on before going out?
- **PR/Comms** – Your PR/Comms team is going to be a major part of this. Who are they needed to get approval for messaging from?
- **Operations** – Your execution team is going to have to move fast. This may mean giving them operational control with out having to seek approval. Decentralized decision making is critical to speed and efficiency in these times.
- **Executive Approval** – What must be approved by executives and at what level.



# Then Identify Key Stakeholders

Next is to identify the key stakeholders. Each stakeholder has a different role.

## Customers

Which of your customers are going to be affected. This could be a wide range of customers from those who are directly affected by the event, to those who are going to be affected by changes in your business from the event.

\*\*\*Depending on your situation you may not have access to tools, or technology. You should have a back up list of all customers saved. The location of this file and it's last updated date should be included in your plan.

## Stakeholders

The stakeholders at large are your

- Community Leaders
- Vendors
- Partners
- Service Providers

\*\*Stakeholders should be identified ahead of time. A list of local agencies, all vendors, partners, and service provides contact, and phone numbers should in your plan.

## Employees

Employees may be part of those affected as much as a part of the internal effort.

- Have chain of command for each type of situation defined
- Determine if employees are personally affected

\*\*You likely have a list of employees in a HR system, which may be non accessible in a crisis if internet is down. It is wise to have a back up copy with roles, location, and personal contact info stored locally.

# Identify Key Issues Before Response

How will each of these parties be affected

## Customers

Determine how they are going to be affected.

- Will this cause service disruption?
- Will this cause delays in delivery?
- Will this affect their current use of the product?

## Stakeholders

How will this affect your stakeholders.

- Will this affect the tools or technologies you are using to create or deliver value?
- Will this affect the greater community at large?

## Employee

How is this going to change the roles and responsibilities of employees.

- Will this change affect their ability to do their job?
- Will this change what their job is?
- Will this affect their personal health?

**\*\*The quicker you can answer these questions the faster you can get a response out into the marketplace. Having contact lists accessible will expedite this process.**

# Communicating Initial Response

- Draft initial response and have approved by new chain of command.
- Publish public facing statement both to PR wires, as well as on owned asset such as your blog.
  - On your blog be sure to include the date the information was last updated
  - Provide a link to real time support, or chatbot on page to answer real time questions
- Directly communicate with affected stakeholders. You may also create a separate location for them to receive new and information.

## Be Compassionate

Make sure your messaging is compassionate to the affected population. Try to avoid harsh language, and find a supportive and authentic tone.

## Take Ownership

If you bare any responsibility for the situation you must apologize and take ownership of your actions.

## Share Next Steps

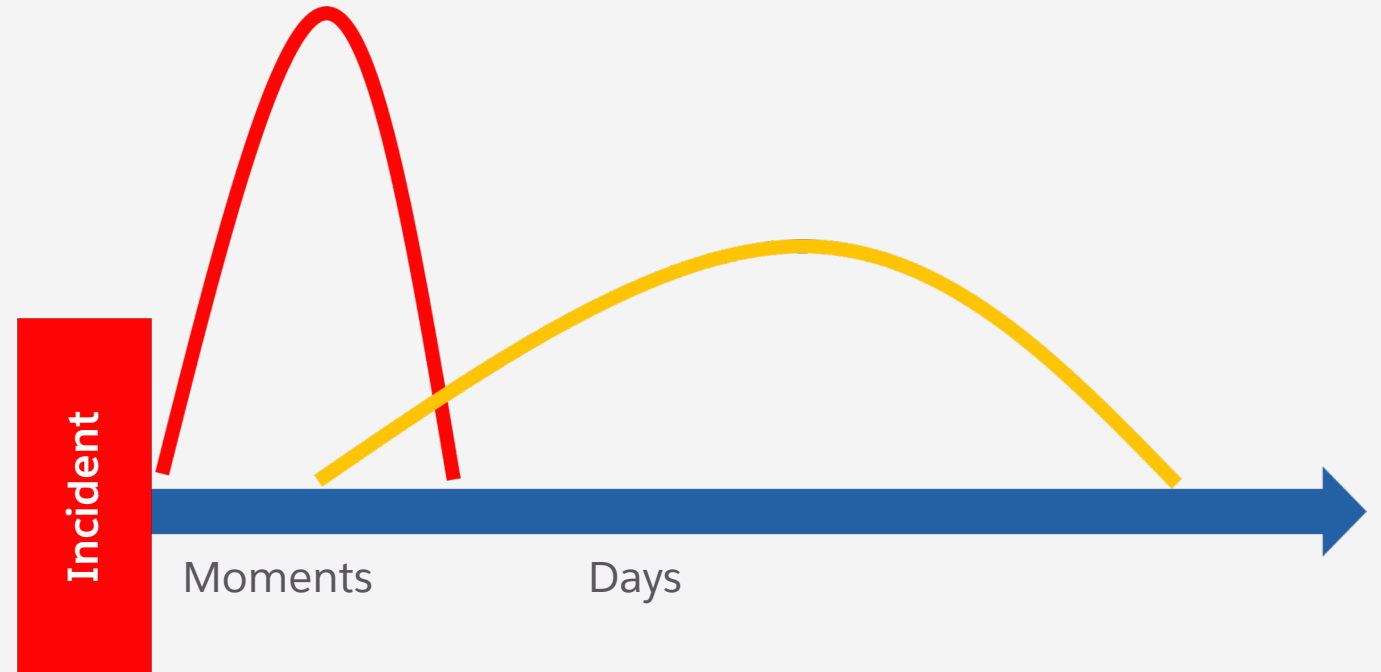
You should also end your statement with what your next steps are and what the next steps the affected parties should take.

# Phase 2: Pivoting

## Phase 2: Pivoting

Depending on the situation you are going to have to try to maintain a large scale PR effort, while also deterring how marketing is going to continue to support it's role in the organization.

Phase 2 begins as soon as you have internal stakeholders engaged, and will last until recovery is in full swing. This could be days, weeks, and in some cases months.



# The Keys To Effective Pivoting

When a major challenge happens there are three foundations you must rely on. Those are: real time intelligence, collaboration, and the agility to pivot to new ideas.



## Information

Each situation is a new world requiring a new set of intelligence. This includes market, customers, and internal business operations.



## Collaboration

Each situation means change, and this means the current course you are no is likely to be radically altered. You must have a handle on all customer facing programs so you can shift accordingly.



## Agility

Your normal go to market strategies, workflows, and processes are not likely able to keep up with the pace of change. Agility is the only way to respond in time.

# Information and Collaboration

This is a large effort of both internal information, external information and a detailed processes of sharing it with relevant stakeholders.

## Daily Stand Ups

Stand-ups create a daily flow of real time issues from the ground up. Stand-ups must answer three things

1. What did you do yesterday
2. What are you doing today
3. Any roadblocks in your way

Each stand up manager attends 2 stand ups. Gathering info from their reports, and passing it to their managers.

## Daily/Weekly Calls

Identify key information sources and ensure you have daily calls with the. This could be analysts, key customers, government officials, key groups of customers, etc.

Weekly call with your full team and have each team report on progress. Fast paced, full call should take 30 min.

## Internal Data Feed(s)

There should be real time data feeds of information for various teams, projects, and information. Real time and collaborative are key.

### **Ex Format:**

Slack Channels, Chatter Group, Google Doc, MS Team, Quip

### **Ex Content:**

Daily analyst reports, customer stories, project collaboration, success stories

# Elements of Agility

The better you can collaborate the better you'll be able to weather any storm. Collaboration really needs to have a few basic elements. Technology to collaborate, a list of programs you are collaborating around, and all parties involved in those efforts.

## Reassess Goals

New situation means new goals for the team. You first need to ask the question what are your new goals, and move from there.

Lean into your audience, community, and stakeholders to understand what your consumers new needs are.

## M.V.P

Next is what you can get out the door with minimal amount of time and effort. Test that and iterate as you go. It's a new world and testing is the only way to truly know what is going to work.

If you are having to pivot a program you should narrow the scope of that program down so you can execute on time.

## Communication

During your pivot you must communicate with all parties involved. This may include sales teams, vendors, and other stakeholders.

You must bring them along with you. Do not forget them! They are the key to rebounding.





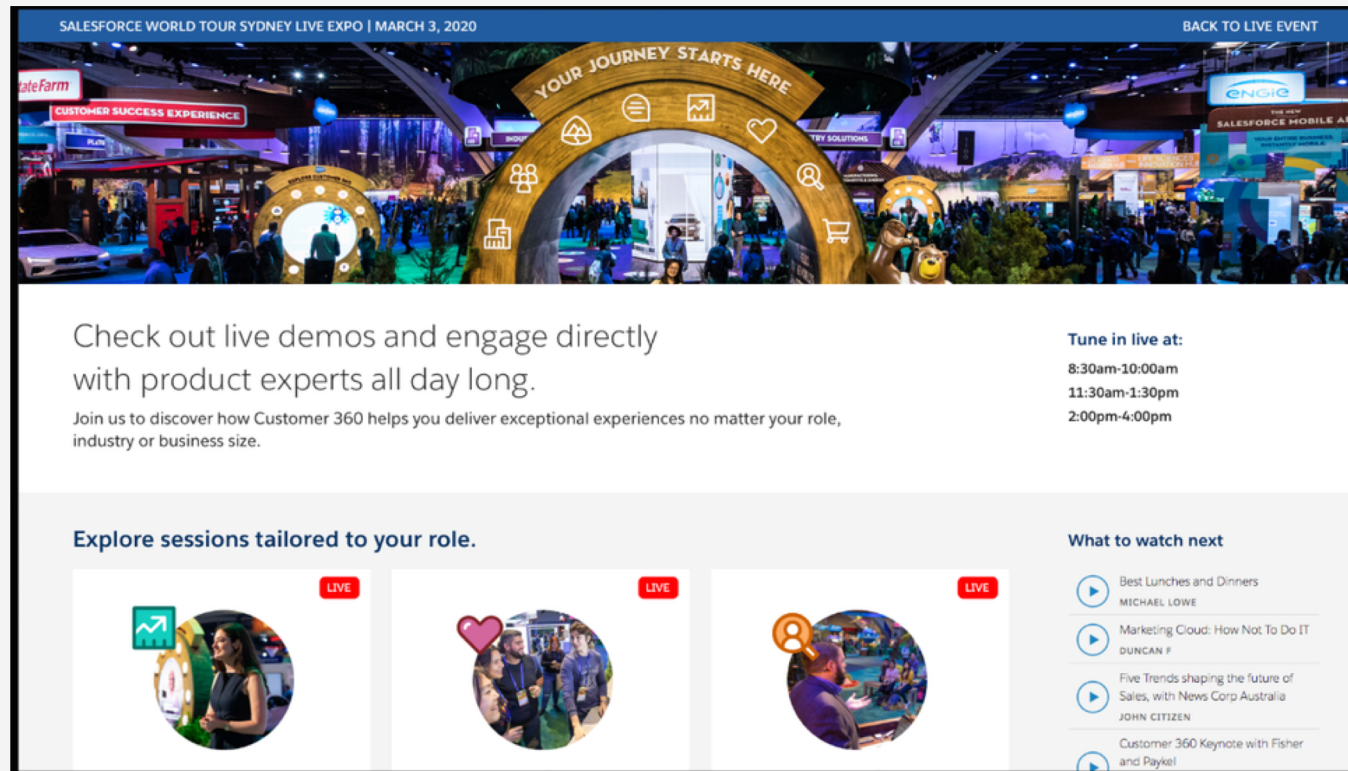
## Pivoting Our Largest In Market Event in 10 Days

Our flagship in market event which would have had 10k physical attendance was able to pivot in just two weeks to become fully digital. **The effort reached 1.5 Million Online Views!**

How we did it, and what we learned.

# We Reimagined The Experience

We had to think about the core purpose of attending such an event and how we could meet the needs of all stakeholders in a digital environment. Specifically analysts, customers, and partners.



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
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DUNCAN F
-  Five Trends shaping the future of Sales, with News Corp Australia  
JOHN CITIZEN
-  Customer 360 Keynote with Fisher and Paykel

**Reimagine Customer Interaction:** From creating a fully digital experience, to watch parties in offices across the region.

**Reimagine Programing:** Slimmed down programing and looked through the lens of the screen for what worked best.

**Reimagine Success:** Shifted goals and numbers to reflect the new reality.



# We Brought Everyone Along

We had to think about the core purpose of attending such an event and how we could meet the needs of all stakeholders in a digital environment. Specifically analysts, customers, and partners.

## Sales Teams

- Kept sales in constant communication and ensured they had a say in what we did.
- Created viewing parties
- Shifted budget to allow for them to buy and send swag to clients
- Opened up budget for catering to create viewing parties in customers offices
- Created “how to” guide for engaging customers in new format

## Vendors

- Created an online expo
- Created staffing schedule for online experience
- Worked with vendors to create live demos, and host downloadable content
- Set up special rooms for vendors to run live content to be streamed inline with the event.

## Internal

- Relunched a KickOff Call with the start of the pivot.
- Created an internal information hub. Posted daily to the hub with updates for all to see.
- Worked with PR to come up with new talking points and goals to share with media.
- Broke out into teams focused on key items, like technology, programs, and ran daily standups
- Decentralized decision making

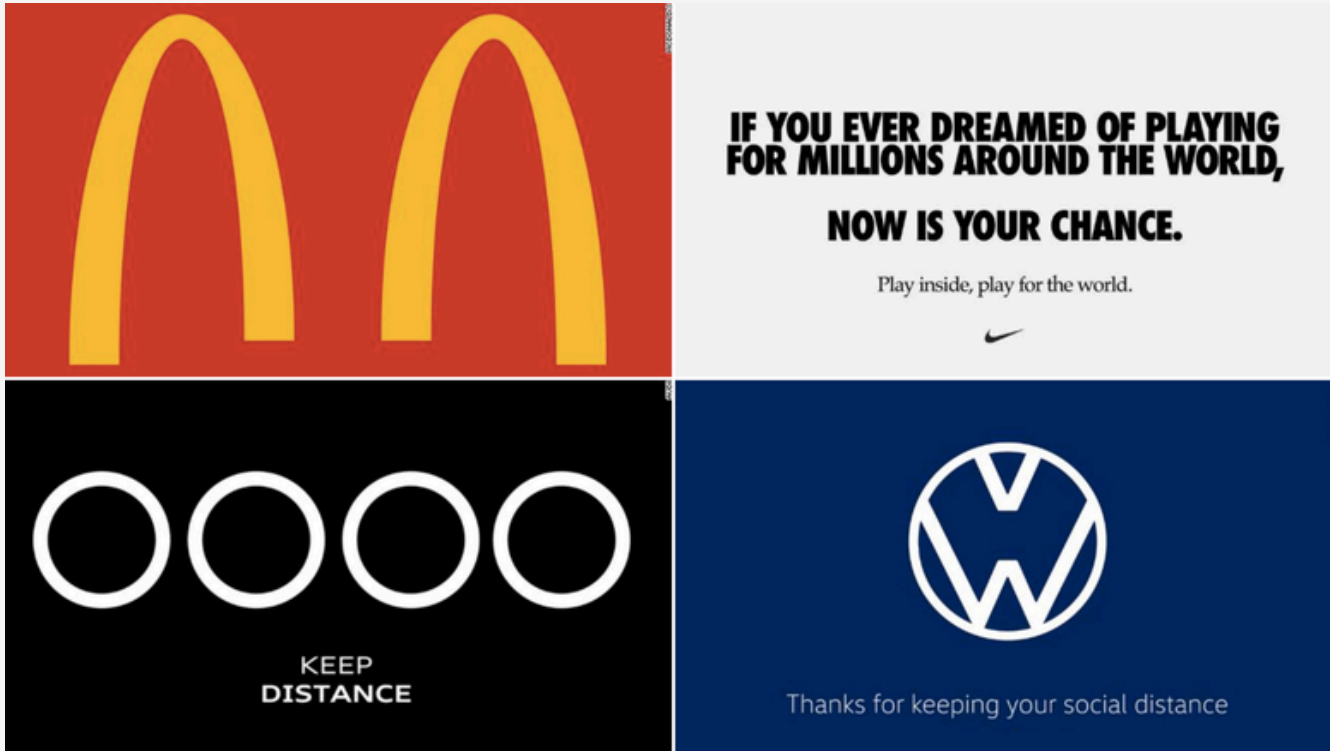


# Ways to Respond In Context

Here are six ways you can continue to engage  
your audience during turbulent times

# 6 Pathways to Reach Context During Trying Times

- **Connect** – Look at your market and find ways to connect people. This could be customers, or just the marketplace at large. Look for ways to be a connector.
- **Inform** – You can share helpful information with your audience. Maybe reinforce larger messages, or present them in a new way as a sign of unity.
- **Support** – Can you support your customers, and stakeholders. This can be personal or professionally.
- **Teach** – Look for ways to help upskill your audience. Can you teach them new skills, or help them become better versions of themselves.
- **Entertain** - Solve the issue of 'being bored'
- **Provide** – Can you provide a needed service. This may mean finding new ways to utilize your product or service.



# Inform Your Market

The majority (63%) of advertisers have already changed the messages they are touting in-market, increasing:

**Mission-based marketing (+42%)**  
**Cause-related marketing (+41%)**

Informing can also take a more tactical approach by becoming a key information feed for your stakeholders. What are customers saying, collect market data, and provide real time customer and market information to them.



# Find Ways To Connect People Together

Look for ways you can connect your market together to solve common goals. This is how brands can work with their market to build brand equity in new ways.



Bud Light looked to create a site to connect local people to their establishments who were open for take out. They created a micro site called “Open for Takeout” and asked the community to list businesses in support.



# Support Key Stakeholders

## Budweiser In Britain Example

Pubs are taking a massive hit as they are not allowed to be open. So Bud has created a program where they have created gift cards asking patrons to pre-purchase drinks ahead of their eventual post-coronavirus reopening..

Bud will match all purchases up to \$1M pounds.





salesforce.org

## LEADING YOUR CAMPUS IN TIMES OF CRISIS

WEDNESDAY, APRIL 1 @ 11AM PT / 2PM ET

Tulane  
UniversityIVY TECH  
COMMUNITY COLLEGE

Cornell University

INDIANA  
UNIVERSITYLEADING  
THROUGH  
CHANGE

# Find Ways To Teach

We are leaders in more than business software, our customers look to us for guidance. So we created a new content series called “Leading Through Change” where we teach businesses leaders what we are doing and what steps we are taking.

Be careful about opening up your content libraries for free. There is a glut of content right now and unless you have a good processes for onboarding and ensuring they are engaging with the content you may be hurting your brand.

LEADING  
THROUGH  
CHANGE



# Look to Entertain Them (or their kids)

Lessonly created multiple efforts focused on entertainment in the context of the moment. Their focus was first on giving their parents some free time back by entertaining their kids for an hour.

Next they created care packages which were full of things for their prospects and customers to do.





# Provide Ways Your Product/Service Can Be Put To Beneficial Use



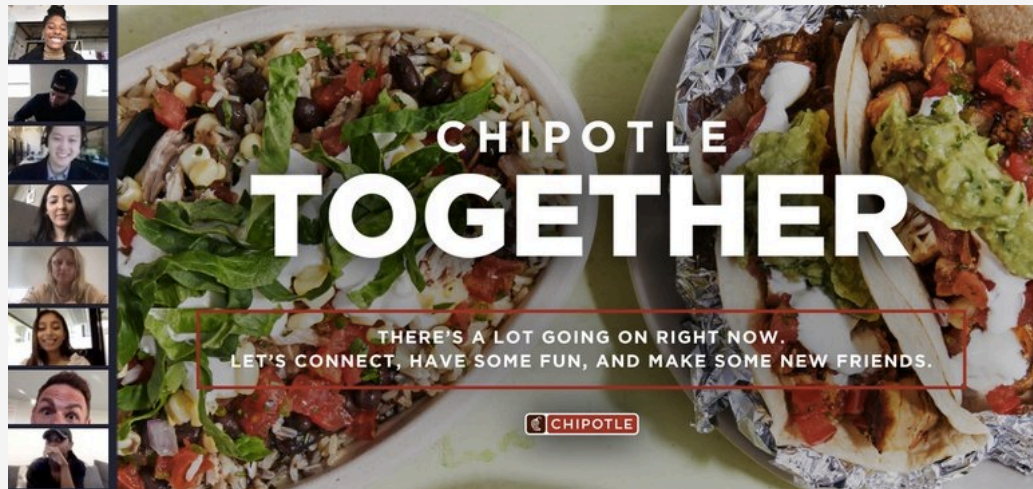
**TRAILHEAD**

We created a publicly-available Trailmix on Trailhead with tips on how to work from home and maintain personal well-being during this time. This effort is focused on our customers, and our employees to provide training for those who need some soft-skills on how to cope with the current situation.

Our Health Cloud is offering free access for qualified emergency response teams, call centers and care management teams for health systems affected by coronavirus. We are getting our tools into the hands of people who can use them to combat the situation free of charge.







# Double Down On Experience

Chipotle doubled down on delivery features and added more.

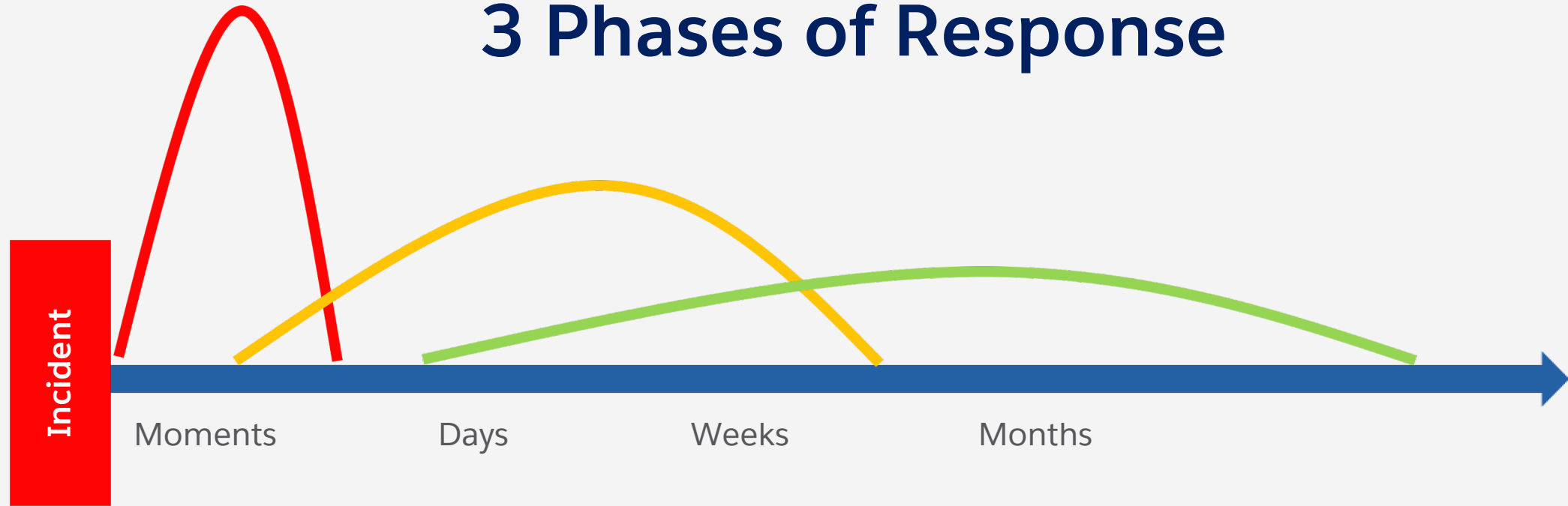
- Increased their delivery tracking capability and highlight that with messaging
- Created tamper proof packaging
- They even provided ways for their social audience to engage while social distancing.

More than a third (35%) of advertisers are adjusting their in-market tactics and are increasing:

**Audience targeting (+38%)**  
**OTT / CTV device targeting (+35%)**

# Phase 3: Marketing's Pathway Forward

# 3 Phases of Response



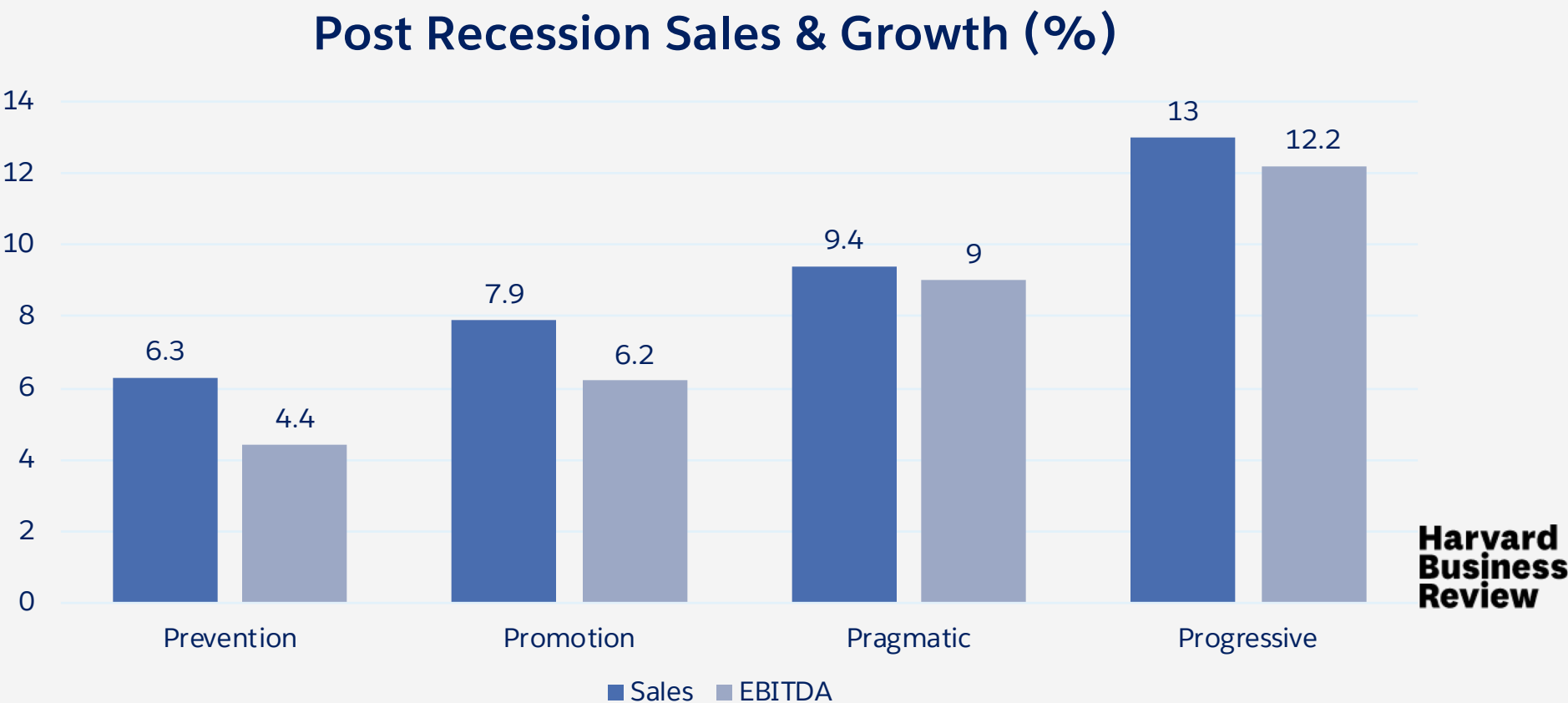
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# Rebounding Best Via Progressive Approach

Post the 2008 Financial Crisis HBR published a study on which companies recovered fastest. Companies who employ a **Progressive** approach, have the fastest recovery, and the highest post recession sales and earnings numbers upwards of 3X of their competitors.





# The 4 Keys For The Progressive Approach

Progressive companies **reduce costs selectively** by focusing more on **operational efficiency** than their rivals do, even as they **invest relatively comprehensively in the future by spending on marketing, R&D, and new assets.**

1. Master Internal Alignment
2. Excel at Stakeholder Continuity
3. Continued Investment in Strategic Efforts
4. Rapid experimentation

# Master Internal Alignment

- Data suggests many brands are more connected than ever, yet the difference between high and low performers remains relatively consistent. This suggests it's not just connecting, rather to the extent of the connection. **The key connections seem to be a single view of each customer, creating shared data accessible and actionable by all, focused on a shared set of goals, and measurements.**
- Rally marketing and sales around new targets. Those progressive companies pointed sales teams to top priorities among accounts and prospects, **as determined by the account's all-in profitability and potential lifetime value.**
- The focus must be on the experience now more than ever. If you are considering **implementing a CXO now** is a good time. They can lead the effort to streamline the businesses around the experience. Their impact will be foundational for a rapid rebound and future success.
- Create **centralized workflow for all external facing efforts** ensuring all communication from all departments is cohesive.

# Excel at Stakeholder Continuity

You must create a processes for keeping communications high with all stakeholders. The connection and insights are critical to current and future operations.

## Partners/Vendors

You need the entire ecosystem during, and post recession. Have a central portal and hub of information for each vendor type, have daily/weekly calls to check in, and ensure there is a single point of contact for each.

## Customers

You should have a central hub of information, but also create working groups to learn how customers are reassessing priorities, reallocating budgets, switching among brands and product categories, and redefining value. This information must be shared company wide, and even with other stakeholders. This is value you can bring to others too.

# Continued Investment in Strategic Efforts

During the 2000 recession, Target increased its marketing and sales expenditures by 20% and its capital expenditures by 50% over prerecession levels. It expanded into several new merchandise segments, ramped up investment in credit-card programs, and grew its internet business. -HBR

## People

Finding and training good people is costly, and hard. Cut back programs before people. Talent pool quality will also increase.

## Technology

Invest in new technology that support key inabilities, operational efficiency, and new capabilities.

Expect a lower return on new capabilities until after a turn in conditions. .

## New Markets/Products

New markets can still be focused on. Your returns will be slight during the troubled period but will position you for accelerated growth on the back end.

Investments should be less expensive as well during this time.

# Rapid experimentation

Old ideas may no longer work. Work to test ideas in an agile format and then roll that learning out on a larger scale.

## 80/20 rule of marketing experimentation

**Time:** Spend 80% of your time innovating, researching, planning, and creating new experiments. This could be content, programs, ads, new audiences, etc. Spend the remaining 20% of the time tweaking your successful efforts and folding these learnings back in.

**Budget:** Spend 80% of your budget on the high performing programs and campaigns that you know work. Spend the other 20% on the experiments to find new learnings.

# Additional Resources & Questions



# Have Questions?

If you have any questions we are here to help answer them. Email us at [ypo@salesforce.com](mailto:ypo@salesforce.com). We wish you and your loved ones the best during these difficult times.

We're here to help.



# Additional Resources

If you or someone you know find it helpful, Salesforce is providing [free SalesforceCare solutions](#) to companies or teams of any size who have unmet needs to support customers, employees, partners, and communities in these unprecedented circumstances.

We will also soon be offering \$10,000 Salesforce Care Grants for small businesses to provide capital to help them weather this crisis. [Sign up here](#) to receive more information as soon as it is available, or pass along this informational URL to someone who might need it:

<https://essentials.salesforce.com/salesforce-care-for-small-business/>



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# THANK YOU