"Casey Hibbard is an expert in Success-Story Marketing and her terrific book *Stories That Sell* will help you reach people in the best way possible, through customer storytelling."
—David Meerman Scott, bestselling author of *The New Rules of Marketing and PR*

THE COMPLETE GUIDE TO SUCCESS-STORY MARKETING™

STORIES *THAT* SELL

TURN SATISFIED CUSTOMERS INTO YOUR MOST POWERFUL SALES AND MARKETING ASSET

CASEY HIBBARD

Marketing Communications

> *"WHERE DOES trust come from? This is what every marketer wants to know. Without trust, marketers know that there are no sales."*
>
> —**Seth Godin,** *Permission Marketing: Turning Strangers Into Friends And Friends Into Customers*

From your Web site to mailings to events, all your marketing messages should move your audience into deeper levels of trust and understanding of your solutions. And those messages are not just reserved for prospective customers. Don't forget to communicate your successes continuously with all your constituents and stakeholders, including employees, partners, the media, industry analysts, and current customers. Customer stories easily work into most marketing-communications media for nearly all audiences. This sub-chapter discusses the many ways to use customer stories in your marketing.

Web Sites

Increasingly, buyers research new products and services online, before ever talking to a company representative. Most often, a potential buyer types keywords into a search engine and gets a list of vendors. He then follows those search results to a variety of Web sites, which effectively become the first impression he has of an organization. When a simple search yields your company along with dozens of competitors, how do you differentiate your business and establish trust quickly?

Build rapport in the competitive online environment with the voice of the customer, which is significantly more credible and memorable than your own marketing messages.

Customer success stories are one of the most effective ways to draw in visitors, give them insight into what it's like to work with your business, and offer them a sense of what to expect. If customers see that others like them had positive results, they feel more confident in choosing your organization. "You need to speak to the audience and a case study is a way of doing that," says Rafael Zimberoff, CEO of Z-Firm, LLC (www.zfirm.com) of Seattle. "Testimonials and case studies are ways the audience feels like they're hearing from someone other than our marketing department."

Hit Every Audience

In fact, Z-Firm speaks to all of its audiences on its Web site. The company makes software that automates frequent business functions such as shipping, faxing, printing, emailing, credit-card processing, and printing from within popular back-office business software such as Microsoft Outlook, GoldMine, QuickBooks, or Peachtree, as well as with eBay and PayPal. Additionally, the shipping software works with UPS, FedEx, DHL, and United States Posted Service shipments. If you take all the different combinations of Z-Firm's software and shipping carriers, there are more than seventy different combinations, not to mention customized use—and Z-Firm creates a customer story for each specific combination. "I've always felt like success stories are a great way to make a sales pitch," Zimberoff says. "Your prospect is in a vertical business, say they are in segment A. Here's an existing customer in segment A that might help this prospect 'get the message'. It's kind of like having a virtual sales force." And that virtual sales force pulls its weight. The "Case Studies" link on the Z-Firm site ranks among the more-visited areas and the firm's case studies are popular downloads.

Design with the Customer in Mind

As with any Web-design planning, it's essential to think through your customer's self-driven education process. Visitors aren't necessarily looking specifically for customer stories; they're just looking for details about your products and services. Organize your site so that customer stories are prominent and available throughout a visitor's time on your site, allowing the customer to read them anytime.

Offer multiple avenues for site visitors to reach your customer stories, even starting right on the home page. If you have space available on your home page, consider teasing one particular story. LANDesk does this with a small photo relevant to a featured customer, and then related copy: "Can you securely manage your field-based and traveling laptops over the Internet. Gwinnett Hospital System can." The box then links right to the hospital case study. Vocus (www.vocus.com), maker of on-demand software for public-relations management, uses a full one-third of its home page to highlight a customer's photo and testimonial, with a link to "More Case Studies." Those images change to feature a different customer each time someone visits the site.

EMC (www.emc.com) has a "Customer Stories" link right on the main navigation bar on its home page. It makes sense considering that someone browsing the site might want to first see what types of companies EMC works with. From that link, you can search for a particular story by company name, products and services, or industry/business solutions. But if a site visitor goes right to solution or product information first, links on those pages called "Customer Examples" take them to relevant customer stories. Depending on how they research EMC solutions, site visitors have multiple ways to arrive at the same customer stories—when they're ready for them.

Don't make your site visitors—interested potential customers or supporters—hunt for your customer stories. Consider where site visitors might want to access customer stories, and give them doorways (links) at all those points. Some companies push their customer stories into isolated sections on their sites called something like "Downloads" or "Resources," rather than with product or service information, forcing site visitors to track down stories. Worse yet, sometimes they're so difficult to find that you have to perform a site search or look at the site map to find them. If nowhere else, include links to customer stories with the products and services the stories highlight.

Keep Cases Organized

Large companies such as Microsoft have hundreds of customer stories on their Web sites, making organization, or "story banking," essential. Even if you have just a few stories, the same rules apply. Site visitors must be able to find relevant stories quickly. That includes not just current and prospective customers, but also sales representatives, external partners, and members of the media looking for specific customer examples.

Simple search or narrowing capabilities like drop-down menus help visitors find the stories that interest them. Organize menus by various categories: featured company, product, general category of solution, industry, geography, business size, etc.

Free Access vs. Curtained Content

Many companies struggle with the question of whether to give away certain marketing content freely online or to ask site visitors to provide their names and contact information in exchange. When it comes to customer stories, there are valid reasons for either option. By letting prospective customers access your content anonymously, they can direct their own online research without interruption. Plus, a certain percentage of people simply will not choose to download a story if you require their personal information in exchange.

Yet, if you ask for a prospect's contact information, you can capture those hot leads in your database and start establishing a relationship and trust with them over time. If you choose to require this type of registration, Brian Carroll, CEO of InTouch and author of *Lead Generation for the Complex Sale,* recommends keeping required information to a minimum. "Set the threshold of the information you want to receive from someone as low as you possibly can," he says. "If you ask for a lot of information, they either don't fill out the form or they may lie. Case studies and success stories are valuable, but be judicious about what fields you require from people. We start simple with a name and email address. Gather more information as you use other content pieces. You could use the analogy of dating. A little bit of exchange of information develops comfort over time. People who are dating don't share horrific relationship stories or intimate personal details about themselves on the first date."

Carroll also cautions that many people input incorrect phone numbers when asked to provide them, or enter their personal email addresses. Companies often discount registrants with Yahoo or Hotmail addresses as invalid (maybe sneaky competitors?), however, they are likely valid contacts concerned about their main business accounts receiving spam emails. "Competitors, if they really want to, will get your information one way or another. That's not a reason to ignore the majority of people who aren't competitors, but want to avoid getting their corporate inbox full of irrelevant emails," Carroll says.

Search-Engine Optimization

These days, it's not enough for customer stories to be compelling. Like the rest of the content on your Web site, they've got to improve search-engine rankings. Search engines are extremely text-oriented, making written customer stories excellent pieces of content to include on your Web site.

Basic search-engine optimization rules say to include words and phrases in Web content that people may use to search for solutions like yours. If well written, customer stories should naturally support your marketing messages and will likely already include keywords related to your solutions. But it doesn't hurt to go through stories specifically to make sure they include keywords and phrases.

Chris Winfield, President of the Internet marketing and Web solutions firm 10e20 (www.10e20.com), stresses that links and descriptive title tags further improve your search-engine rankings. "Customer stories are really good at attracting links or making it easier for people to link to you," he says. By links, he means finding opportunities to publish URL links to customer stories at various places on the Web. For instance, maybe the featured customer or partner involved will include links on their Web site back to the story on your site. Or, if you send out a press release on the wire about your work with a particular customer, include a link to that case study. See if a trade or other membership organization of which you belong is interested in running a brief summary and link on their Web site or in their newsletter to a story on your site. Blogs and discussion forums may also include links to customer stories, if they are relevant to the audience. More links equal better search-engine rankings.

Above all, Winfield suggests specific title tags on stories for the greatest impact on search-engine rankings. When you visit any Web site page, the title tag is the description of the page listed at the top left. The top of 10e20's home page says, "social media marketing, search engine optimization, website design"—all keywords for what the firm provides. Too often, companies are not specific enough. "What I see a lot is, 'Success story: Company X' as the title tag. But if you can say, 'Successful ERP Integration for Company X by Company Z' then that helps bring you up for all those terms," Winfield says.

Also consider how to present your success stories on your Web site, either the full text on your site or as PDF files. If you print the full text, then search engines can readily read all that valuable content, helping optimize your search-engine results. If you choose PDF versions, you need to ensure that PDFs are created such that they are readable. It's best to talk with your Web designer or search-engine optimization firm regarding how to create PDFs with searchable text. But some tips include ensuring PDFs are created with text-based programs instead of image-based ones; optimizing the title tag with keywords; putting other Web links in PDFs; keeping file sizes small; and including keywords near the top of the PDF. Regardless of the format you choose, you might consider providing site visitors a short summary first, with highlights of the story and solutions featured, and then giving them the option of reading the full case.

Online Customer Communities

We all want to feel part of a community. For that reason, consumer and business-to-business companies alike are beginning to leverage customer/user/member communities to keep customers informed, and allow customers to interact with one another and their vendors. Customer stories can be a valuable part of educating current customers about fellow customers' experiences in an online customer community.

Leading automaker Toyota Motor Sales created a micro site (www.toyotaownersonline.com) to provide Toyota owners with resources they need to enhance the ownership experience, such as maintenance schedules, and dealer, parts, and service information. In 2005, Toyota added a "Stories from the Road" section to capture customer experiences—directly from customers. Customers contribute their stories (and their photos, if desired) that speak to Toyota brand messages such as reliability, safety, and fuel efficiency. A California commuter talks about crossing the 400,000-mile-mark in his fourteen-year-old Toyota Paseo that just won't quit. A couple from San Antonio reports that their Prius allows them to make fuel-efficient cross-country trips, enabling them to visit their grandchildren more often.

Based on the success of that main site, Toyota launched a Toyota Truck Nation site dedicated to owners' own accounts of their high-mileage truck experiences. At once, the sites give current owners a means of sharing that feedback with Toyota and other owners, as well as offer owners insight into other vehicle options. "The goal of the site isn't to push product, but it does have a halo effect," said Jennee Julius, Advertising and Promotions Manager for Dealer Operations. "People are happy with their vehicle and people tell other people they are happy with their vehicle. It probably means more to those owners than us saying it. It's also another way to thank people for being a member of the Toyota family. We get feedback from owners, and it provides a tool for owners to tell their stories to us and other owners. It helps us create a community."

If you choose to create an online customer community, consider adding customer stories to it, whether those are submitted by customers or created by your organization. They're not just for selling to new customers. Stories help reinforce that customers belong to a community of other customers, and educate current customers about new ways to use and benefit from your solutions. The more extensively customers understand and benefit from your solutions, the more likely they are to continue loyally buying.

Other Online Opportunities

The Web is a vast place with new marketing opportunities emerging all the time. Pay-per-click advertising has become a hot way to *pay* to get your name in front of search-engine searchers. Ads are typically around one-hundred characters, giving you very little space to say anything. From there, those interested take that link to a landing page with more information. Winfield of 10e20.com suggests including links to related customer stories on landing pages. "Instead of overtly selling, say 'Learn how this worked for company X,'" he says.

Social media sites such as forums and weblogs (blogs) offer another opportunity to raise awareness about your customer stories online—if done in the correct way. While social media often become grounds for complaints more than success stories, they also serve an educational purpose. People participate in social media to share information and stay abreast of certain topics, and many of them may be looking for a solution like yours. However, you can't be overtly commercial.

General business sites such as Yahoo Answers (http://answers.yahoo.com) or Startup Nation (www.startupnation.com) cover a broad range of business-related topics. But thousands of more narrow topical forums exist for you to follow. If you serve the health-care industry, for example, find forums specific to the challenges health-care organizations face. Keep up with forum discussions as they happen. First, that gives you an understanding of your audience. Second, you might recognize opportunities to provide helpful answers. Over time and increased postings, you become a trusted advisor or thought leader. When appropriate, summarize a customer example in a posting, or drop in a link to a customer story to indicate how a similar company solved a problem. Pay attention to forum rules. Most prohibit explicit promotional postings, but if you're genuinely helpful, then you probably won't cross that line.

Blogs are another opportunity to share customer successes online. If your organization has its own blog, and a customer story fits within the context of your blog's purpose and audience, share a customer anecdote. By their nature, blogs are informal modes of communication, so stay conversational and relatively brief in recounting a success story. In other words, it may not be appropriate to include a fully written customer story in your blog, but you can provide highlights and then link to the full story.

Newsletters

Newsletters, either emailed or mailed, keep you in touch with all your audiences, including current customers, prospects, partners/resellers, and employees. You want to keep all these groups excited and convinced about your capabilities, especially as you improve and change products and services, and grow the business. Keep them informed so they feel part of that success. Customer success stories fit nicely in newsletters for any of these audiences. In email newsletters, where readers are less patient with scrolling down an email, include summaries that link to full versions back on your Web site.

Prospect Newsletters

Prospective customers typically sign up for permission-based communications such as newsletters in order to learn more about solutions and topics of interest to them. Secondarily, they expect to learn more about your organization in the process. Your goal: Build the prospect's trust over time and their perception of you as a leader in your industry. Highlight at least one customer story in every newsletter. Show a variety of stories to showcase your different vertical markets and types of solutions. That gives them bite-size bits of credibility, education, and validation of your products and services.

Regularly include customer stories in newsletters to your various audiences to educate them over time about your solutions in action.

Customer Newsletters

Don't forget to include customer stories in newsletters to current customers. They have their own personal experiences of your organization already, however, there may be other products or services they have yet to try, or other ways customers use solutions in best-practices ways. Sharing those ideas with customers helps them use your solutions more effectively, continuously reinforcing your value in their eyes.

"Our customer case studies reinforce to our existing users that they are members of a community, not just isolated users," says Zimberoff of Z-Firm. "They reinforce that other kinds of businesses or similar businesses use the same solution, and that again helps confirm in the customer's mind that they did the right thing. It's a tool to inform the entire community."

Partner Newsletters

Run customer stories in communications to partners/resellers to keep them updated on the types of customers using your solutions and in what ways. That helps all partners pick up new ideas about ways to bring solutions to their customers. Plus, they become aware of the types of stories available to support their own sales efforts.

Employee Newsletters

From accounting to HR to customer service, everyone in your organization needs to understand how your products or services help customers—especially those with minimal direct interaction with customers. They don't have the chance to hear those first-hand stories and know the impact the organization has on its customers. It's not only educational for them—knowing who and how solutions are used—but inspirational. They know that, even though they may not serve customers directly, they work for an organization that makes a difference, boosting their morale and motivation. "As we grow, it's hard to keep employees informed about the breadth of things we're doing across the company, so we use customer stories as internal educational tools as well," says Donita Prakash of Acumen Solutions.

Events

At live events, attendees expect to be both entertained and educated. They're looking for insight on how others meet business challenges effectively. Stories capture their attention and are more memorable than just about any other form of information delivery. Events offer a number of ways to share customer stories with all your audiences, including prospects, current customers, partners/resellers, and the media.

Live Presentations

Workforce-management solutions provider Kronos® Incorporated (www.kronos.com) brings together about 1,500 workforce management professionals for its annual KronosWorks conference. Current customers, prospects, and partners look forward to the event's highlight, the company's Best Practices Awards Program. As part of that, award-winning customers present details about their best-practices uses of Kronos solutions. According to Michele Glorie, Senior Director, Corporate Communications, Kronos added those presentations based on feedback that attendees wanted to hear those stories.

Live examples presented by customers and partners give attendees concrete examples of how others benefit from products and services, and ideas for how to use existing solutions better or how new solutions might work in their environments. Likewise, many current customers and partners want the opportunity to showcase their innovation and results to their peers. When selecting story presenters, as with any approach to customer stories, ensure speakers represent a wide range of customers and solutions to hit your various types of customers.

Customer stories—presented by customers, partners, or company representatives—also pack a punch in online "webinars," teleclasses, and smaller in-person events for prospects and customers. In promotional efforts before your event, mention the real customer examples that you'll feature, which will likely increase interest and participation. Prospects don't want to hear from just company representatives about your products and services. Rather, real customers bring a level of credibility only possible from peer-to-peer presentations.

Written Stories

Most of us have attended trade shows and picked up bags full of glossy marketing materials, most of which are expressed in the vendors' words. To stand out, you need to communicate with prospects in a way that resonates with them and their current challenges. In conversations with prospects at large events, mention a customer in a related business who has seen success with your solutions. Ideally, come with an assortment of different printed customer stories that represent your vertical industries, geographic areas, and different products and services. It's both impressive and powerful to share with a prospect the story of a customer facing and solving the same challenges.

Direct Marketing with Stories

Two seconds, maybe three. That's about all the time you have to convince someone to read your promotional email or snail mail. According to direct-mail stats, about ninety-eight to ninety-nine percent of the time, people hit delete or toss the item. To be read-worthy, your message must be clear and targeted specifically for the recipient. Customer stories are one tactic to get your direct marketing noticed.

Telling Small Tales

Direct marketing delivers promotional messages straight to potential customers on an individual basis–right to their mailboxes or email accounts. Again, here is another opportunity where a customer story can get readers to notice your communication and linger longer. If you apply the "like me" factor of stories to direct marketing, by featuring customers who are like recipients of your mailings, readers can more readily identify with the message and become intrigued to learn more about this person or organization facing and solving similar challenges.

But in direct marketing–a medium with a notoriously short attention span–telling stories requires restraint or you risk turning off the reader. We've all received direct-mail letters with stories, appeals, or product pitches that extend three or four pages. That is almost always too much, especially if you haven't built much of a relationship with the recipient. For instance, I'm more apt to read a long letter featuring a story from the Humane Society, of which I've been a member for years, because I know, like, and trust them already. But if I receive a three- or four-page letter from a national nonprofit I've never heard of, from halfway across the country, I'd see all the text and stop before even getting into the first paragraph. In direct marketing, less is often more. Get the reader's interest and then give him links or ways to explore further.

Snail Mail that Works

Design That Works (www.designthatworks.com), an Atlanta-based marketing and creative firm, does this so well that people have actually called with their address changes–to ensure they keep receiving the firm's mailings, which include postcards featuring satisfied customers. The firm's use of success stories began in the late '90s, when owner Linda McCulloch sought a way to differentiate Design That Works and show the value of its services to prospects. With a name like Design That Works, the firm wanted to show it works, but felt a little uncomfortable talking itself up. "The marketing communications business can be so full of smoke and mirrors, and you're always telling everyone how great you are," McCulloch says. "I don't like to blow my own horn excessively, so I felt that if I could get my clients to blow my horn for me that that would be more convincing to potential clients."

The customer "horn-blowing" began with the firm collecting testimonial letters from clients, eventually growing to a two-inch thick binder. But Design That Works wanted to take that rich success-story content beyond just sharing letters with prospects or running a few quotes on its Web site. The success-story postcard series was born. Though initially hesitant about asking customers to be featured in mass mailings, McCullough found they were thrilled to share their results–and to benefit from the exposure of being "stars" in the campaigns.

The 5½" x 8½" postcards feature specific client projects, with static copy about the firm running down the left-hand side. Three client-focused sections tell the story: The Challenge, The Result, The Quote (client testimonial), each about one paragraph. They also include small images of the project's output, such as a Web site screen shot, marketing collateral, or trade-show signage. Though it isn't much copy, it still tells a story of the client, its goals, and how the business achieved success (see a sample at www.StoriesThatSellGuide.com).

Each mailing, about three times a year, showcases a different client's challenges and results. The goal: stay top of mind with clients and prospects. And it's worked. The postcards stand out among all the mail clients and prospects receive, and show audiences the specific results that other companies have experienced with the help of Design That Works.

While the postcards are one of many marketing tactics Design That Works employs, the postcard is, at times, the piece that finally motivates folks to make a move. "I've gotten really good feedback on the postcards over the years," McCulloch says. "They're to the point, easy to read, and colorful so people remember them. For what it costs to print and mail them, they're a great way of staying in front of people."

Continuously expanding the success-story concept, Design That Works ditched its traditional company brochure and replaced it with a success-stories booklet that pulls all the postcard content into one collateral piece. With nine client projects included, the booklet tells a complete story of the firm's capabilities and results. Likewise, McCulloch brings in client stories anecdotally in meetings with prospects. In one case, that got the decision-maker engaged and interested, turning into a sale. "There's nothing better than saying, 'Let me just tell you a story about how we helped a client differentiate themselves,'" she says.

Design That Works also encourages clients to use their own testimonials and success stories in telling their stories. "It works for just about any company if the story is compelling, has a ring of truth, and is spoken with passion," she adds.

A Winning Campaign

Success-story-based direct marketing has also worked exceptionally well for a large company campaign, Sage Software's "Sage 360" (www.sage360.com)–actually topping all other media used in the broadly executed campaign in terms of results. Dennis Frahmann, Executive Vice President of Marketing for the Business Management Division, attributes the results largely to the personalization of each direct-mail piece. However, the focus on real customers helps increase reader interest to look further at the materials.

The 360 campaign has a number of direct-marketing variations. It features customers on postcards, in emails, and in more elaborate direct-mail pieces. Each one highlights a different customer's success story. Postcards, 11? x 6 inches, capture the 360-degree customer photos on one side with brief summaries of the customer's experience with Sage Software on the other side. Sent to current customers, the postcards encourage them to learn more about other Sage Software solutions by attending one of several upcoming free live webcasts about the software. The email campaigns follow a similar approach. Each direct-marketing piece includes a personalized Web address, where customers can go online to learn more about the specific solutions that may be most applicable to them, based on Sage Software's existing knowledge of those customers. The high response rates come from that powerful combination of a featured customer, with an issue similar to one the recipient is facing, and an easy way for customers to learn more.

Tips for Direct-Mail Storytelling

Both companies—one small, one large—seem to be beating the direct-marketing odds and getting noticed by featuring real customers. Both used postcards, a highly effective option because readers don't have to decide whether to open it first. The images and messages are simply right there in front of them. But your direct marketing featuring customer stories can take a number of other forms: sales letters, flyers/self-mailers, article reprints on your company, articles on a topic of interest to the recipient, complete printed customer stories, white papers, newsletters, event invitations, and research reports. In any of these formats, you can weave in a customer story.

If you plan to integrate direct marketing featuring customer successes into your own efforts, keep in mind the following tips:

Clearly state customer results

Don't stop with just a customer testimonial, for testimonials don't tell a story. Help the reader empathize with and get to know the featured customer by briefly touching on his challenge, the solution that was applied, and then the benefits/results the featured customer has experienced. Use clear, easy-to-understand language, instead of industry jargon the reader might not understand.

Tailor for the audience

Just featuring a customer's story is not enough. The message must still match up with the recipient's demographic profile or his possible needs/challenges. Or, talk about a message or challenge that might be universally appealing to a broad swath of customers, such as an issue all small, growing businesses face.

Use graphics well

As with any marketing communications, don't let it go out the door without professional-looking design and copywriting. Perhaps use a customer photo, as Sage Software does. Among a stack of mail or the recipient's inbox, nice graphics, photos, and headlines increase your direct-mail open rate (the percentage of people who open the communication).

Include a call to action

Encourage readers to take some action now. That might be a special, limited offer; an invitation to an upcoming event or webinar; an encouragement to read the rest of the featured company's story online; or an offer of a free report that the prospect or customer can download from your Web site. Always give them some next step to take.

Follow email rules

If email is part of your direct marketing campaign, learn and follow spam rules. Find details on the guidelines in the *Direct Marketing Association's Guidelines for Ethical Business Practice* (www.the-dma.org/guidelines/EthicsGuidelines.pdf). Use the "Find" feature on your computer to search for the relevant terms such as "e-mail" and "online," as this topic is covered in several sections of the document.

For more information about direct-marketing best practices, visit the Direct Marketing Association at www.the-dma.org.

Clearly, direct marketing rooted in reality can help mailings stand out in the pile.

Customer stories add a compelling element to all your marketing communications. Just ensure that you have a broad range of stories so that a prospect can find one that sounds like his situation.

Sub-Chapter Take-Aways

- Don't force Web site visitors to hunt for customer stories. Offer multiple, logical doorways to the information.
- Consider teasing one story on your home page, and change it often.
- Organize stories by various categories on your Web site: featured company, product, solutions, industry, geography, products, business size, etc.
- If you require customers to register for stories, only ask for a small amount of information, such as name and email address.
- Optimize stories for search engines.
- Include stories in online customer communities.
- Feature customer examples in newsletters for prospects, customers, partners, and employees.
- Invite customers to present their live case studies at events, webinars, and teleclasses.
- Bring a wide range of stories to trade shows and pull out just the right one for each prospect.
- Set direct marketing apart with storytelling.

Selling with Stories

> *"Nobody has time to try anything anymore. Everyone wants to know before they buy something that it will succeed. And they need to have a high degree of confidence before they touch a product or service that it's going to meet their needs, and the customer story helps establish that."*
>
> **—Rafael Zimberoff, CEO, Z-Firm, LLC**

It doesn't matter if you're a one-person business, a nonprofit, or a multi-billion-dollar global corporation. In order to make a sale or gain support, you have to connect with people on an individual level. They have to like and trust you before selecting you. If they don't know your organization, or don't have a personal referral from someone they know, they need evidence that you're credible and can accomplish what you say you can.

By the time prospects get to the sales process, they have seen your marketing materials and perhaps talked with a sales rep—two very biased sources of information. Customer stories provide that third-party credibility so essential to removing risk in prospects' minds.

Jill Konrath, author of *Selling to Big Companies*, repeatedly reinforces the importance of real customer stories and results. She says that corporate decision makers "are especially interested in how similar companies have tackled the very same challenges they're facing."[16] It's a "like me" dynamic that's powerful in just about any marketing or sales opportunity.

This sub-chapter covers the many nuances of using customer stories in the sales process, from timing to type of content to ensure sales reps know how to use that powerful content.

16. Konrath, Jill, *Selling to Big Companies*

Timing Story Use

In sales and marketing circles, opinions vary widely about when to use customer stories in the process. Do you leverage them early for lead generation or opening doors? Or later as proof sources? In reality, those selling well use them throughout the *entire* sales process, as well as *before* the process even begins–as training tools for sales reps. Before interacting with prospects, the sales person has to understand the full value of what she is selling—the difference the solution makes for the customer. Then as you develop a relationship with potential customers, you start with tidbits of customer stories and build until you reveal the entire picture in complete detail. In the beginning, you may give the audience one piece of information or a hint of the broader story.

As prospects move through the sales process, they are exposed to increasingly more information to help them make the final decision, including detailed metrics and results.

Training Reps with Stories

Before selling anyone else on solutions, sales people must be sold first. If you don't believe in and understand the value of what you're selling, it's pretty hard to communicate it clearly, strongly, and convincingly to anyone else. Too many sales people lack that conviction in their own products, according to Konrath. "It's amazing to me how many sellers who have worked for their companies for a long time don't really understand the value they are bringing to the table," she says.

That's why it's important to include customer stories as part of the sales-training process. Doing so educates them about how the products or services are actually used by customers. What are the typical challenges a customer faces that require a new option? How do customers leverage the products or services in their daily workflow? Or, how does the typical project play out with a customer? What are typical benefits that customers experience?

Just as critical, customer stories get sales people excited and motivated about what they're selling. They have to be evangelists for these products and services or they can't effectively convert prospects to customers. In fact, that emotional connection is essential to sales success. "If sellers just feel like they're dialing for dollars, they don't stay at it very long, they abandon their account entry campaigns because they don't want to be a pest and they don't understand the true value," Konrath adds. "But if sales people are shown multiple customer stories and understand how their offering significantly impacts potential customers, they'll pursue accounts much longer and with a clear picture in their mind of how they can positively affect the prospect's business. It significantly shifts their own mindset. This is much more important than most people realize."

You can bring customer stories into sales training in multiple ways: orally tell some of your best stories to reps in training; include written stories in training binders; give reps video or audio interviews with customers; or do all of the above. The more stories reps hear, the more they will understand what they're selling and be able to recall those stories in the next step–talking with actual prospects.

Door Openers

Once they are fully educated and motivated themselves, sales people need those same customer stories to begin conversations with prospects. Most prospects are so busy and so bombarded with information that any effort to get their attention by phone, mail, email, or in person must stand out. It's important to have succinct customer-data points in your back pocket, such as time-savings, cost-savings, or other relevant measures of success for your product or service.

Most often, sales people begin communicating with a potential customer via voice mail–just the perfect venue for dropping a different data point with each successive contact. Here's how Konrath suggests bringing in one little piece of the customer story early in the process:

"Hi Bob, Jill Konrath calling. I'd like to talk with you about how to increase your sales conversion rate. One of our recent clients was able to increase conversions by sixty-two percent in a four-month period."

The next voice mail or interaction might go something like this:

"Hi Bob, Jill Konrath calling again. I mentioned last time I called that a client was able to increase its sales conversion rate. They also saw a significant impact on average order size. In fact, that went up fourteen percent in a three-month period."

Or, you can drop similar proof points in follow-up emails or letters to prospects. In this type of story use, you don't even need to name the customer you're referencing. What's most important here is the data to support the value proposition and begin getting the customer interested enough to consider changing his current situation.

However, if the referenced customer is in the same industry or is recognizable to the prospect, it might be beneficial to name-drop in that case. To that end, the more stories you have across all the different industries and types of organizations you serve, the better you are prepared to pull out just the right examples to mention to a prospect.

At this phase, some companies choose to use customer story-booklets as a key piece of collateral to share with prospects by mail or in person before more detailed conversations commence. The booklets highlight success stories, short overviews of customers' experiences, to give the prospect a broad idea of the types of customers you serve.

Education/Evaluation

Once you secure a conversation with a prospect, be ready with more examples and more details about other customers' experiences that are particularly relevant to the prospect.

As prospects move through the sales process, they begin their due diligence–some formal, some informal. Initially, they're looking for answers about how the products or services will work in their environments and with their people. Are services delivered on site? How long is a typical engagement? What are the upfront and ongoing costs? Do new solutions work with existing ones? Their goal: narrow down to a short list to consider further.

As a vendor, this is when you need to give buyers a really solid picture of what it would be like to work with you. As part of your sales toolkit, PowerPoint presentation, or your sales proposal, customer stories help buyers answer these questions. Stories provide the next level of detail buyers need to decide to move forward or not. At the same time, success stories reinforce your credibility and value in the mind of the prospect by showing them that you have happy customers–hopefully just like them–who have seen success with your solutions.

"For a lot of people, there's the typical fear, uncertainty and doubt," says Brian Carroll, CEO of InTouch and author of *Lead Generation for the Complex Sale*. "'Are you any good? Do you understand me?' As buyers start to look at vendors and who you've worked with, they want to know, 'Have you worked with someone like me?' As you're getting to the point where people are asking those questions, that's where the success stories are really pivotal to prove that. If sales people don't have tools like customer stories in the mid to late stages of the buying process, they aren't on fair footing because customers need to see—especially if you sell something intangible like services—what the solution looks like."

Remember that each company and prospect is different. While there might be common concerns and questions, individual concerns vary. For example, if a prospect had a bad experience with its previous vendor's customer service, then service may be the prospect's number-one concern. Share a customer story that includes mention of another customer's service experience. Or, a company that provides health-insurance plans for small businesses needs to reinforce to busy Human Resources teams that administering the health plans won't add to their many responsibilities–that, in fact, going with the insurance company will ease the burdens on the HR team. It's each sales person's job to listen for those concerns, and respond with the appropriate customer stories to answer objections. In this phase, leverage written success stories or case studies, or video or audio content.

Validation

When the prospect has narrowed the short list to one or two providers, it's time to go about the process of validating the proposed solution. The amount of proof a prospect needs usually depends upon the size of the investment up for consideration and the perceived risks of the decision, such as short-term disruption and time involved. At this stage, many prospects want detailed accounts of other customers' return on investment (ROI) results or payback period, the time required to recoup the costs of the solution. Managers need this hard data in order to make the sale internally to executive decision-makers at the organization. Ensure prospects are equipped with the right evidence to help make the sale.

The proof points vary depending on what you provide. They don't always have to be translated to hard numbers, though some prospects will want that kind of quantification. For a nonprofit providing constructive summer and after-school programs for girls, the metrics might be that grades went up and behavioral problems went down for a girl that participated in its programs. An organizational-development consulting firm would want to show how its services increased employee satisfaction and lowered turnover. The best approach is to understand your prospects and what proof points they want, and work on capturing them in your stories.

Up-Selling and Cross-Selling

Don't miss out on the opportunity to leverage customer stories with existing customers. Up-sell more of your products and services to customers by using examples from similar customers. It's also extremely effective to capture a story on a subset of an organization —one division, department, location, or franchisee—and then take that story to other divisions, departments, locations, and franchisees within the same organization. There's added credibility when you can share a story that's not just the same industry, but another branch of the prospect's own organization.

A CRM software company created a customer story featuring the success of one branch of a major nationwide mortgage company. The branch had become the number-one branch in the country largely due to productivity with the software. Using a success story on that branch, the software company got in the door with leaders at the national headquarters and are now in talks to take the software to more branches nationwide. "The success story has been extremely important in our sales efforts," the account rep noted.

Right Information, Right Time

To be effective in the sales process, customer stories have to deliver the right information at just the right time. Imagine managing customer stories for about one-hundred products and services, available in dozens of countries. That's the challenge for a large data-storage solutions company. The company's full-fledged customer-reference program, with thousands of customers, ensures that potential buyers have the opportunity to understand the experiences of current customers. Though they are just one of the reference team's responsibilities, customer stories are a significant piece of the program. The company currently has more than 550 customer stories–in written, video, and podcast formats—across its many products, services, customers, industries, and geographies. And the reference team continues to grow the databank of stories based on the field's needs.

When the company's customer reference program began in 2003, it used "customer profiles," two- to three-page customer stories that summarize the customer's relationship with company products and services. But the reference team heard grumbling from the company's field employees. "We were hearing discontent in the field that stories were not what they needed to help win business," says the director of the company's reference team. "The stories weren't that targeted to specific initiatives or products or proof points. It was just the story of their relationship with us."

Before creating more new stories, the company engaged Phelon Group (www.phelongroup.com) to take a more strategic approach. The firm helps organizations gather customer insight and key metrics to enhance customer retention, referability, and repurchase. Working together, they devised an online survey to poll the field about their use of and need for customer stories. Out of 6,000 sales reps, eleven percent across thirty-five countries completed the survey–an impressive response rate for busy reps focused on sales.

Here's what they learned:

- A small percentage uses the right tools at the right times during deals.
- Story access was the biggest challenge. Ease of access to stories was a bigger determinant of use than potential tool effectiveness.
- The field wanted more current and detailed stories.

In response, the company inventoried its existing stories and performed a strategic gap analysis to fill the voids. It also defined a "customer evidence model" to help reps understand when to leverage different types and lengths of customer stories based on time in the sales cycle and type of decision-maker:

Customer profile

Two- to three-page stories that highlight the challenge, solution, and benefits/metrics. Technical and business decision-makers consult these during the early awareness and interest phases as they explore solutions online.

Customer-solution showcase

Four to six pages that focus on the story of the solution, rather than the customer, using customer proof points to validate the solution. Available on the intranet for reps to use with business and technical audiences in the early part of the sales cycle.

Case study

Seven to ten pages focusing on either the implementation (event-focused) or the technical solution (product-focused). For use during evaluation and selection. On the company intranet.

Total cost of ownership (TCO) profile

The company works with a third-party ROI analysis firm to capture an unbiased view of the investment and returns for final decision-makers. Stories are ten to twenty pages and used during the evaluation, selection, and purchase phases. Accessible on the internal site.

With a broad mix of stories from which to choose, sales people have what they need, now easily accessible in a searchable online catalog that also includes video clips and podcasts of customer stories. Reps around the world can look for the stories they need by product, service, industry, type of story, language, and geography. As needed by regions, the company translates stories into different languages. But for new product rollouts, they create stories in all languages where they do business to ensure prospects understand new solutions.

Ultimately, the company hopes to minimize live one-on-one reference calls by talking to customers once and then creating a series of relevant stories that effectively give prospects a sense of what their experience might be as customers. “We’re putting all this work into the upfront customer story development to ensure the field has a fully rounded portfolio of customer stories, and to negate the later need for a sales call to provide the proof points to customers. The stories show them other people are doing it successfully,” says the director of the reference program.

Financing Proposals/Presentations

Making your case to banks, investors, or venture-capital firms is similar to the sales process. However, instead of selling them on specific products and services, you’re selling them on the viability and potential profitability of your company. If you can demonstrate satisfactory and successful relationships with current customers, these parties have greater confidence in supporting your organization. For these contacts, leverage success stories to show short overviews of several customer relationships.

IMPACT-New Mexico Business Services (IMPACT-NM), the business services division of New Mexico Community Capital (www.nmccap.org), created a series of success stories featuring some of the small, rural New Mexico businesses it has assisted. The nonprofit provides hands-on business expertise from executives in the region, and thus represents an essential missing link in the development of New Mexico’s economic infrastructure. Through “in the trenches” mentoring, IMPACT-NM delivers a full range of financial and development services to entrepreneurs, giving them critical customized assistance.

The organization provides business services that many New Mexico small businesses would not otherwise be able to afford. Client companies cover some of the cost of the services provided, while IMPACT-NM subsidizes the remainder. To do so, the organization needs to attract capital from investors interested in “double-bottom-line” benefits —the benefit of a return on the investment and the rewards of helping a company grow and create jobs in poor rural communities.

To approach investors and show its value to all stakeholders (employees, volunteers, board members, grant organizations), IMPACT-NM created several success stories on clients that grew their businesses with the assistance of the organization. For major investors in particular, the organization felt it needed well-written stories to show its value. “Now that we have compelling client stories explaining the power of our sustainable business services, a thorough business plan for IMPACT-New Mexico, and strategic and operating plans, we feel well-equipped to approach these people,” says Leslie Elgood, Chief Operating Office and Nonprofit Director. “Because New Mexico Community Capital does not have a lengthy track record of service or the emotional appeal of many other non-profits (especially those that feed the hungry, serve children/families, do animal welfare, etc.), these stories are our way of creating both a strong business bond and an emotional bond. They *show* what we are accomplishing through client voices. They document the needs by using expert testimony—that of the service recipients.”

IMPACT-NM leverages the stories in multiple ways: on its Web site; printed and paired with a one-page executive summary; a tool in fundraising meetings and conversations; for public relations and media inquiries; mailed with an introductory letter; and left behind in face-to-face meetings. In live conversations, the stories serve as launching points for specific discussions about client successes.

Teaching Sales Reps to Use Customer Stories

A lot of time and energy goes into producing strategically crafted customer stories. It’s essential that sales reps understand how to use them to maximize sales opportunities. Many organizations include strategies for using customer stories as part of their sales training programs.

SAP AG (www.sap.com), the world’s largest business software company, identified a need to train its sales representatives specifically on using its “reference assets,” such as success stories and ROI case studies. “We knew that reference assets are one of the most powerful sales tools offered to the field, but learned that not all reps know how to effectively use the assets we offer,” Erik Schulz, Vice President, Customer Value and Reference Services.

In 2006, SAP built and launched an online course as part of its SAP University, "How to Use Reference Assets in the Sales Cycle," which teaches reps how to use which assets for which purposes. The module is part of the optional curriculum for Sales & Marketing at SAP. Through surveys of the field, SAP has developed an understanding of when reps use the company's success stories and ROI case studies for the greatest impact. For example, success stories are applied most in the "Explaining" phase, while more extensive ROI case studies are used most in the "Proofing" phase. SAP shares those statistics with reps in its e-Learning class, as well as which assets are available to reps, ways to use them, different approaches for different customer segments, and how to nominate successful, happy customers for the reference program.

To make the content engaging, SAP chose an interview format whereby featured reps share their experiences and best practices from the field. It also includes mini case studies to help reps practice the newly learned skills. The training emphasizes careful selection of the right story for the optimum fit with the prospect. It's also available in a PowerPoint format for easy distribution and reference.

To date, the course has proven popular with reps. "The course is consistently one of the most frequently used eLearning assets our team provides," Schulz said.

Story-Selling for Independent Consultants

Customer examples in sales are just as essential for small businesses and independent consultants as they are for large companies. Anna Maravelas, President of TheraRising, Inc. (www.TheraRising.com) and author of *How to Reduce Workplace Conflict and Stress*, calls herself a "corporate peacemaker." Over the past twenty years, she has resolved countless work-place conflicts at organizations large and small, public and private.

Yet despite her success, she found that prospects had a hard time seeing the real value of her conflict-resolution consulting and seminars. To help them understand more clearly, she began capturing customer success stories to serve as important evidence that organizations pay a huge price for conflict in the work place.

"I began using written success stories out of the frustration I felt with people not recognizing how important the work was, and hesitating to spend the money when I knew in my heart of hearts that they were losing tens of thousands, hundreds of thousands or even millions of dollars in profit," Maravelas says.

Up to that point, Maravelas had leveraged her success stories verbally in conversations with potential clients. But several factors led her to put her stories in writing: a desire to document clients' cost savings; a need to show the details behind client results (how they got from point A to point B); a desire to focus on the prospect's current situation in discussions and leave customer examples behind for the prospect to read later; and concern about forgetting the nuances of various customer successes over time, if they weren't documented.

Due to the sensitive nature of conflict resolution, Maravelas leaves client names off her success stories, and writes them based on her project experience with customers, as opposed to interviewing client contacts again. She finds prospective clients, who face similar conflict issues, respect the need to keep client names confidential.

Of course, customer stories are just one part of her sales and marketing toolkit. "The story adds one piece to the puzzle that also includes the credibility of being interviewed in major publications," she says. "All of it says, 'I trust this woman. She seems competent.' It's a powerful combination."

She finds that written success stories also help her contacts sell her services to others in their organizations. They have documented cost-savings details from other companies to share with decision-makers. In addition to giving stories to prospects, she includes them on her Web site, and features many in her book. Those stories become interactive in her seminars. She tells the group about an actual work-place conflict, and then asks them to speculate what might be the hidden cause. Then, she provides the insight and outcome, which help the audience truly understand the concepts she's teaching. "I always try to highlight the stories that are touching, that appeal to our emotion and our desire to have lasting relationships," she says.

Anatomy of Customer-Story Use

So, how does a sales rep use a customer story in a typical sales process? Jim Conway, Account Manager, Energy for IHS Inc., is quite literally "in the field" every day. As he sells FieldDIRECT, an IHS service for capturing and storing oil and gas production data, he meets with foremen and pumpers in the fields of South Texas.

A thirty-year industry sales veteran, Conway believes strongly in using customer stories to help prospects understand exactly how they will benefit from using FieldDIRECT. "I use case studies in every presentation and in every conversation with prospects," Conway says. "They provide a lot of validity and credibility for our service."

After talking with a prospect by phone, Conway follows up that conversation with an email that includes product information, and three or four FieldDIRECT customer stories. For in-person meetings, he assembles a collection of materials on the FieldDIRECT service, such as a summary of the value proposition and benefits, along with printed versions of several customer stories. In presentations, he inserts brief customer examples in his PowerPoint slides. He pulls the most compelling proof points and testimonials from the customer stories to show how existing customers are successfully using the service in their workflow.

For one particular sales opportunity, Conway left behind his usual packet of materials that included the stories. "The decision-maker read every single line on the Web page and in all the materials I left," he says. "I feel like it was huge for those guys to be able to see how other companies are using the service." Conway landed the deal, a customer with the potential to bring as many as 1,000 wells into the IHS FieldDIRECT service.

To sell well with customer stories, Conway stresses he needs a portfolio of stories from which to choose. Whether he's meeting with a small, independent energy company or a major industry player, he can pull out a story that matches the prospect's situation. "When a prospect sees a similar client using the service successfully in their workflow, they can really see how they could gain from it," Conway says.

Whether your organization is large or small, you can leverage customer stories to help buyers get past the fear and uncertainty in purchase decisions. Customer stories and the content therein are valuable at every stage of the sales cycle; just choose the right type and amount of content to resonate with decision-makers as they move through the buying process.

Sub-Chapter Take-Aways

- Include customer stories as part of the sales training process to educate reps about the benefits and results that customers experience.
- Drop bite-sized pieces of customer proof points—on voice mail, email, or mail—when trying to get in the door with prospects.
- In the education/evaluation phase of the sales cycle, give prospects stories that answer their “how does it work” questions to help them narrow down to a short list.
- Help prospects validate the purchase with qualitative and quantitative results details that are important to the prospect.
- Determine what types of stories—in terms of length and type of content—are most influential at each part of the sales cycle.
- Regularly survey the field to understand how effective stories are for sales, and what gaps you need to fill.
- Leverage customer stories to up-sell to existing customers or to sell to other locations or divisions or an existing customer.
- Teach sales reps how and when to use stories, as well as where to access them.

Spinning Success Stories into Media Coverage

> *"Public relations is a form of classic storytelling, but for business...It doesn't matter if you're promoting a country, company, product, person or cause; if you tell the story with the same structure, elements, archetypes and path of all great stories, your message will be heard and acted on. And, in business, whoever tells the best story wins."*
>
> **—Robbie Vorhaus, President and CEO, Vorhaus & Company Inc.**

As a business journalist, I was always on the hunt for engaging stories that no one had told yet. But those were the toughest story ideas to find. Usually, it meant calling around to various contacts and digging for in-the-trenches accounts of businesses facing and solving challenges. Rarely did anything like this come across my desk in a press release or a call from a company. Mostly, I heard about new hires, new products, or new facilities.

For some business audiences, the subjects contained in typical press releases are helpful—usually as lead sources for those looking to sell to businesses with new hires, new products, or new facilities. But many readers want insightful accounts of how other organizations are successfully navigating challenges. Pick up just about any business publication, or visit an online business site, and you'll find articles with success-story themes. A company solved a problem or overcame a challenge as a result of actions it took, or solutions implemented.

Chances are, you have a number of these types of stories among your customer base—accounts of customers doing business more productively, efficiently, or profitably as a result of a product or service you delivered. It's up to you to find those stories and bring them to the relevant media outlets.

"When PR agencies and businesses come to me with customer stories, I'm always interested," says Mila D'Antonio, Managing Editor of 1to1 Magazine (www.1to1media.com). "When you attach a customer story, it really helps bring to life a company's solution or initiative, or brings some cache. It's a challenge to get a good story if it doesn't have a good customer story in it."

Pitching to Editors

Providing a concrete story that's just perfect for a publication's audience goes a long way toward catching an editor's interest. For more than fifteen years, Bob Dirkes has helped companies get their best stories in front of editors. As an account manager at Tech Image, a Chicago-area technology PR firm, Dirkes and the team pitch stories to relevant media for clients every day–and prefer to do so with clients' customer success stories in hand. "If you parse out the story according to the interest and individual requirements of an editor, nothing goes further than a customer success story," Dirkes says. "Those stories are an important part of any business-to-business PR program. And a success story or case study format captures a customer's success story best because it's complete–problem, solution, and results. It's that complete storyline that's key with editors."

The firm actively relies on customer stories to help position its growing technology clients as market leaders. According to Dirkes, a flexible approach to stories gets the best results. As with any marketing communications, target and deliver the information according to the intended audience. For one editor, that might be offering bullet-point highlights that provide a quick overview. Another might like the story as a contributed article bylined by the most relevant customer contact at the featured organization. Or, a reporter may want the complete written story for background to shape her own interview and story.

Tech Image pays attention to editors' preferences and delivers client stories in the most appropriate format. In response, Dirkes finds the average story generates at least three media placements of some kind for clients. "Every success story or case study that we have ever pitched has found a home somewhere in some form," Dirkes says. "It's usually a three to one ratio, with one case generating at least three pieces of media coverage."

Customer-Story Mileage

But many customer stories generate far more than that. Tech Image broke down the coverage that resulted from using a single success story for a customer relationship-management (CRM) software client. Here's what happened when the firm turned it into a press release:

Press release picked up in eighteen different publications and Web sites, including DallasNews.com, Forbes.com, Morningstar.com, SFGate.com (*San Francisco Chronicle*), and Yahoo Finance. "These were wire pick-ups, which simply puts our client's name out there in a persistent positive way," Dirkes recalls. "We don't expect wire drops to generate higher quality stories. We just want continuing presence in what I call the 'Web & flow' of business news."

A writer for TMCnet wrote a column featuring the company based on the story told in the press release and case study.

BtoB magazine assigned a writer to cover it, leading to a nice piece in this widely read publication.

Finally, Tech Image used the written story to submit for and win a CRM Excellence Award for its client's technology.

According to Dirkes, it's the magic of the story that makes a difference with editors. Regardless of how or how many ways you plan to use a customer story, Dirkes stresses that the story must be captured in written form first. From there, it's always available and ready to be used in that format or easily repurposed. Plus, that written content, when launched into the online realm, is now readable by search engines. "If the story has never been captured, and it's just available anecdotally or in someone's PowerPoint presentation, it's not available to be used in all these different ways," Dirkes adds.

Small-Budget Media Relations

Small businesses, with equally small PR budgets, can also leverage customer stories to achieve media exposure. Jeff Fisher has always handled his own publicity for his Portland-based design firm, Jeff Fisher LogoMotives. Fisher designs corporate identities for companies of all types and sizes, and has racked up nearly 575 regional, national, and international graphic-design awards to date.

Fisher weaves in his customer stories in a number of ways. He sends out press releases promoting work with a specific client, and detailing the client project. In tying in with his Jeff Fisher LogoMotives business name, each release is complete with a "Toot! Toot!" at the top and a disclaimer at the end: "*If I don't "toot!" my own horn, no one else will.*"

Tech Image's 'Seven Ways to Slice a Customer Story'

Here are seven ways Tech Image flexibly uses success story and case study content according to various editors' needs and preferences:

Pitch the complete story—When a written story is a fit for a publication's audience, the firm might send it in its entirety to pique an editor's interest.

Quotes—Tech Image sometimes pulls out quotes to share with editors, rather than sending the full story.

Story highlights—Likewise, the firm at times extracts the "summary bullets" that often accompany customer stories. They perfectly encapsulate the results a featured customer has seen.

Prep clients for media interviews—"How do we prep our client subjects for interviews? Have them read their own success stories or case studies," Dirkes says. Before an executive meets with or speaks with an editor, Tech Image encourages him or her to read the company's customer stories so that anecdotes are top of mind and "conversations with editors are compelling."

Help reporters craft questions and stories—A written customer story provides valuable background to reporters as they prepare for interviews and craft their own stories.

Contributed articles—The firm helps repurpose clients' success stories and case studies into contributed articles written by someone at the featured customer organization.

Awards submissions—Countless publications and organizations offer industry awards programs, many of which are customer-story driven. Organizations should look for awards programs and categories that fit their stories. Some might highlight successful technology implementations, while others may emphasize results. Dirkes advises, "Every award has a formula. Study the program to discover the formula."

Fisher also integrates customer stories into articles he writes for magazines and Web sites, and in his own blogs. They also appear in his books, *The Savvy Designer's Guide to Success: Ideas and tactics for a killer career* and *Identity Crisis!: 50 Redesigns That Transformed Stale Identities into Successful Brands*. All of the above benefit Jeff Fisher LogoMotives' business and clients, often small businesses also wanting exposure.

In his thirty-year design career, Fisher has built quite a list of media relationships with industry media and contacts, as well as local and national publications. He focuses on fostering relationships, rather than just pursuing one-time PR. "In initiating a relationship with editors, I sometimes send them one of my marketing packets as an introduction," said Fisher, Engineer of Creative Identity for Jeff Fisher LogoMotives. "Close relationships with some editors/writers allows me to just pick up the phone and contact them immediately in some cases." He also takes advantage of press-release distribution sites such as PRLeap, and posts releases on Fast Pitch Networking, Facebook, MySpace, other social-networking sites, and design-industry Web portals. The biggest benefit of this is better search-engine rankings. At times, editors contact Fisher for additional information. Plus, potential clients more easily find his Web site, as do book authors looking for resources regarding graphic design.

From experience, Fisher has learned to have customer stories and approvals prepared for when media contacts call—on deadline—looking for stories. "In the past, this would result in going into panic mode, tracking down a client for approval to share information about a project and the success of that project, or trying to get signed permission from a client to use visuals from their business under tight editorial deadlines," he says.

Now, he speeds up the process and ensures he makes the most of PR opportunities with a succinct project agreement that covers PR:

"The designer retains personal rights to use the completed project and any preliminary designs for the purpose of design competitions, future publications on design, educational purposes and the marketing of the designer's business. Where applicable the client will be given any necessary credit for usage of the project elements."

Over the years, Fisher's persistent, diligent efforts have paid off with mentions in *USA Today*, *The Wall Street Journal* and *Fortune*, among others. "You never know who will be attracted to your press release information, and contact you, once the content is 'out there,'" he says.

Jeff Fisher's PR Pointers for Small Businesses

Learn to write a press release well, or develop a relationship with a professional who can put your thoughts into proper PR form.

Don't limit PR to local media. "Go for the big media resources in which you would like to see your business promoted. You never know what kind of story national media may be looking to publish."

ALWAYS carry your business cards with you to be ready for PR opportunities that pop up at any moment.

Keep in touch with media contacts on a regular basis, and develop relationships over time.

Don't be afraid to call up an editor, writer, or broadcast producer and ask if they would be willing to take the time for you to buy them a cup of coffee and pitch a story idea.

The Story Press Release

When approaching editors, some businesses share a full customer story as-is, tailor a customer-story press release to the specific publication, or send a summary of the story to determine the editor's interest. Many companies see PR results with a "story press release," a release that doesn't just talk about a product or service, but rather puts it in the context of a customer's setting. Instead of following a standard, formulaic press-release format, such releases tell a story about the customer's challenges, why the organization selected the vendor, and the results the customer has seen. For example, a release that announces you are working with a new customer or just completed a project with a specific customer can detail the customer's need for a solution and how your solution benefited the business. The same goes for product launches or newly offered services.

Media Targeting

As Tech Image and LogoMotives demonstrate, building relationships with targeted media and editors is the path to coverage. Research and reach out to the most important media outlets for your industry and offering, whether those are online, print, radio, or TV programs. Read, listen and watch their programming to see whether they cover the type of information you have to share, and the audience that you target. More than anything else, the audience must match.

Find out what types of stories your key media are looking for. D'Antonio of *1to1 Magazine* prefers customer stories that show the initial problems or challenges a business faced, and the solutions or recommendations applied to those problems. The best ones include specific return on investment or benefit details, she says. Once you know your best media contacts and preferences, create a personalized media list and maintain it continuously. Verify contacts regularly, or before each press release or pitch, as reporters and editors change.

For one-on-one story pitching, determine which media outlet will be the best fit. Call your contact to let them know you have a story that seems like a good match for the publication and its audience, then follow up with more information.

News-Release Distribution Services

You can also distribute press releases via wire services or other online services, which fill in the gaps with all those not on your personal media list. The conventional wisdom is that you can't really expect high-quality coverage in top media from simply sending out an announcement via the wire, but sometimes a press release will hit a media outlet with just the right information at just the right time, resulting in more than a small blurb. Also, sending out news releases via the wire blankets the Web with full press releases or shorter mentions of your company on news sites, improving search-engine optimization and directing more traffic back to your Web site.

The following are wire services and online press-release distribution sites. Some have fees while others are free, and have varying levels of media reach and targeting. Many of them even feature their own customer stories about their results on their Web sites.

PR Newswire, www.prnewswire.com

Business Wire, www.businesswire.com

PRWeb, www.prweb.com

Press Release, www.1888pressrelease.com

WebWire, www.webwire.com

eReleases, www.ereleases.com

PRLeap, www.prleap.com

Press Release, www.24-7pressrelease.com

Marketwire, www.marketwire.com

Send2Press.com, www.send2press.com

Click Press, www.clickpress.com/releases

Express Press Release, http://express-press-release.com

Free Press Release, www.free-press-release.com/submit/free-press-release.php

I-Newswire, www.i-newswire.com/submit_free.php

Media Post, www.mediapost.com

PR Free, www.prfree.com

The Web Wire, www.webwire.com

PR.com

SBwire.com

PRlog.com

i-Newswire.com

Today, you can set up alerts on sites such as Google.com (Google Alerts) to let you know when anything about your organization is published on the Web. Simply set up Google Alerts with keywords that are specific to your company and solutions. Likewise, media outlets and analysts in your industry may be using this feature to track news about organizations like you. That's another reason to ensure that your press releases include keywords.

First Right of Refusal

If the media aims to bring fresh information to its audiences, then many editors want stories that haven't run in other publications, or even on your Web site yet. That's why businesses and PR agencies often pitch customer stories to media contacts before they are published anywhere else. For your most coveted media contacts, present customer stories as "exclusives" and ensure they know that you are giving them the first right of refusal on a hot story idea.

Expect Media to Do it Their Way

You usually can't expect a publication, radio, or TV program to run your customer story exactly as you deliver it. If you want it precisely in your words and format, then it's best to pay for an advertorial. When reporters cover your story, they do so to fit their own objectives, audiences, and editorial formats, rather than to sell your products or services. Hence, the focus will usually be on a particular business topic or your customer, with your name and solutions as mentions in the story. Your customer and solutions may even be a one-sentence or one-paragraph mention in a broader story on a related topic—and may also include competitive solutions. But that's still very valuable publicity.

Anticipate Media Interviews

Editors and reporters also usually take control of information-gathering for their own stories, instead of trusting what's in a story you provided them. In most cases, a success story or case study serves as a means of "pitching" your story idea to an editor, who will then assign a reporter to cover it. Most publications have teams of staff or freelance writers who will take your story as background information, or as the concept of the story, and write their own versions. They do this for a number of reasons. By interviewing subjects and crafting their own stories, they ensure that the story they put out is fresh and hasn't run anywhere else, that it has the angles and information that will interest the audience, and that the sources and data are credible. It gives them the chance to verify the accuracy of information. They can't risk their reputations by printing inaccurate information.

A media outlet could cover your organization or customer story without additional interviews, but many writers and editors will conduct their own additional interviews to fit their angles and audiences, and to confirm the facts are correct.

When you create press releases from a customer story, check with the relevant contacts at client organizations to ensure they are comfortable talking with reporters. If you know ahead of time, you can simply give reporters contact information or arrange a call, instead of having to take the time to call your contacts and make sure they are willing to talk after a reporter asks. If reporters are on deadline—and they always are—they don't have time to wait.

Contributed Articles

With the Web, more media outlets than ever are looking for fresh content: the online sites of traditional media, news portals, industry sites, blogs, e-newsletters, and more. No longer limited to just the amount of space in a magazine, newspaper, or a thirty-minute radio show, they need content continuously. Quite a few take contributed articles, which are authored and submitted by outside parties not staffed or hired by the media outlet.

You often see contributed articles in business and trade publications. Too often, they rehash information readers have heard before, just said in a different way. Here, a powerful customer story can really make an article stand out and provide the concrete examples that readers need. Typically, a contributed article from your organization would be "by-lined" (as in "By Mary Smith") by someone within your company. However, when turning a customer story into an article, it's much more credible and powerful with most editors for your main customer contact to be the author. If you already have that customer story written, it's a simple process to repurpose it as an article written by your customer contact.

Editorial Guidelines

First, find out if key publications covering your subject accept contributed articles. Study the publication's content and read the blurbs at the end of articles that describe the authors. Those written by outside individuals usually include the author's brief bio, title, and organization at the end. Next look for editorial guidelines that define how the publication approaches contributed articles. Those guidelines usually provide details on how to get prior approval for your article, along with specifics regarding deadlines, word counts, and what type of content isn't allowed. Typically, publications are very strict about overtly pushing products, services, or companies.

Also look for editorial calendars. Many publications have schedules of the topics they plan to cover throughout the year with each issue. Much of the content and advertising will tie into each theme, giving contributors an opportunity to find the most relevant topical issues for which to submit articles. If an editor likes your story idea, find out the exact deadline and don't miss it!

The Publication's Style

A customer story usually needs some reworking to transition into an article format. The style, length, and format should match that of the intended publication and audience, rather than your own format. Instead of your product or service being the star of the show, your customer's business challenges and results move into focus. If you don't already use short paragraphs in your customer story, shorten paragraphs to match journalism style. Finally, make sure the article speaks specifically to the publication's readers.

Journalism Style

When you submit a press release or article to an editor, it helps to follow standard journalism style—and may even impress an editor. While this doesn't make or break your chances of securing media coverage, it might help with those publications interested in running your story as-is. Many publications will write their own stories, but sometimes they simply run entire press releases or parts of press releases. If the information already follows clean journalism style, it's that much easier to pop it into their publications quickly.

The *Associated Press Stylebook,* sometimes called "the journalist's bible," has become the standard for journalism style for most publications. You should be able to find it easily on the shelves of your local bookstore or online. Journalism-style rules dictate exactly how your words, numbers, titles, and proper names should read in print. For example, numbers from one to nine are spelled out, while those over ten are written as numerals. Titles are lowercase when separated from the person's name in a sentence by a comma, as in Mary Smith, vice president of marketing.

Style guides are primarily used to ensure that all content in a publication is consistent. Whether you use AP Style or not *does not usually* determine an editor's decision to pursue your story. However, if your document is full of inconsistencies or poor style, it can turn an editor off. As a business journalist, I often tossed really sloppy press releases I received because they indicated companies didn't care or didn't take the time to ensure that the information they sent out was presented cleanly and professionally.

Many companies have created their own style guides to dictate how their product names and phrases should look, and trade marking. For example, they might prefer "website" over the AP Style treatment, "Web site." Using your own style, as long as its clean and professional, shouldn't affect your coverage. It just might mean that publications wanting to run your press release verbatim need to edit it to fit their own style first.

Reprints

Online and traditional media can have strict rules regarding reprinting articles, linking to them from your Web site or e-newsletters, and using their logos. Find out the rules and make sure you follow them to keep in their good graces. Reprints may cost you, so decide how you plan to use those articles and weigh the benefits versus the cost.

Publications that cover your industry or your customer's industry want engaging stories about your customers. The formula is crafting a solid story, presenting it to the right media, and pitching it to them in their preferred manner.

Sub-Chapter Take-Aways

- Editors are looking for stories that show how an organization solved a problem or overcame a challenge as a result of actions it took, or solutions implemented.
- Give editors a complete story: problem, solution, and results.
- Get to know publications' preferences and provide customer-story details in the way each prefers—bulleted highlights, press release, or contributed article.
- Foster relationships with editors and reporters, rather than just pursuing one-time PR.
- If you have a small PR budget, consider using press-release distribution sites such as PRWeb.com, PRLeap.com, or social networking sites like Facebook and MySpace.
- Wire services and other press-release distribution services may not land the best coverage, but they help blanket the Web with mentions of your organization.
- Many companies see PR results with a "story press release," a release that doesn't just talk about a product or service, but rather puts it in the context of a customer's setting.
- Track your online coverage by setting up alerts for keywords and phrases with Google Alerts.
- Offer a story to your favorite publication(s) first. Some even want stories before they go on your Web site.
- Anticipate that publications may want to conduct their own interviews of your customers.
- Turn a customer story into a contributed article by-lined by your customer contact.