

Letters from the Corner Office



Foreword and Introduction

Foreword and Introduction

Hi friends!

Welcome to my corner of insights and reflections. If there's one thing I'm a big advocate for, it's making the content we create deliver over and over again. We pour our hearts and souls into creating content that you'll love and get value from. Why not find new and interesting ways for you to enjoy it?

That's precisely what this gift represents. It's a collection of my thoughts, musings, and maybe a few laughs, all bundled up to offer you a fresh perspective on the rollercoaster year that was 2023. These letters were originally published in the Trust Insights newsletter.

I want to extend a huge thank you to you – whether you're a casual reader of our newsletter, a member in our Analytics for Marketers community, or one of our valued clients. Your role, whatever it may be, is integral to our community, and I'm grateful for it. Here's to wishing you health, happiness, and success 2024.

Katie Robbert, CEO
Trust Insights, Inc.
December 2023

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January 4, 2023: Agents of Change

Trust Insights Agents of Change

There's a lot of crappy things happening at any given moment in the world. Instead of dwelling on the negative, I wanted to reframe and focus on the positive. More specifically, how we can help.

Introducing the Trust Insights Agents of Change Program.

Who are the Agents of Change?

We are. Me, Chris, John, and you!

Since we started Trust Insights we've done our best to give back what we've earned. It's all well and good to talk about wanting things to change but to see change, you have to do something about it. We need to be the Agents of Change. We tell our clients that it's not enough to analyze the data, that they also need to take action with it. This is the same. It's not enough to want change to happen, you have to do something about it. You have to be an Agent of Change.

To date, we have been able to donate to organizations such as the ASPCA, Planned Parenthood, and The Greater Boston Food Bank, to name a few. The goal moving into 2023 is to start to diversify where we're donating to. This is where you come in. I talk a lot about why you should be engaging your community, and I want to do just that.

I want to hear from you, the Trust Insights community. Tell me what you care about, where you donate, where you volunteer your time. Trust Insights will donate to a different charity each month and let our community know how they can do the same.

Please note that Trust Insights reserves the right to refuse to work with

organizations that do not align with our core values.

What if I don't have the funds to make a donation?

A donation isn't always monetary. You can donate your time and skills as well. Some organizations are looking for volunteers to help with programs. Some organization are looking for donated skillsets (like marketers!) to help get the word out. Each month I'll let you know where we're planning to donate and the different ways you can help.

How will you choose where to donate?

We will put it to a vote in our Free Slack Community, Analytics for Marketers. The organization with the most votes that month will get the donation. Once we have selected the organization, will will notify the community and we'll update our website. Don't look for the page, I haven't built it yet. Soon!

Want to get involved? Reply to this email or [join our Free Slack Group, Analytics for Marketers](#). Tell me where you want to see us donate and what organizations you care about.

January 11, 2023: Data Before Decisions

Review Your Data Before You Make Decisions

I love data. That's a given. But more than the data itself, I love the story and the action. I'm a problem solver, a fixer. If I can't figure out what to do, I dig deeper.

Over the weekend, I was trying to determine if I was taking care of my indoor plants properly. I have dreams of creating a jungle inside of my home. I have an app that allows me to take a picture of the plant and the app will diagnose the issues. Unfortunately, the best advice it gives is that I'm either watering too much, or not enough. This is hugely unhelpful.

It got me thinking about how we do the same thing with out marketing. If you've been playing around with tools like ChatGPT you know that you have to ask it for something before you get an output. If you're delegating to a team member, you need to tell them what you need before they can do it.

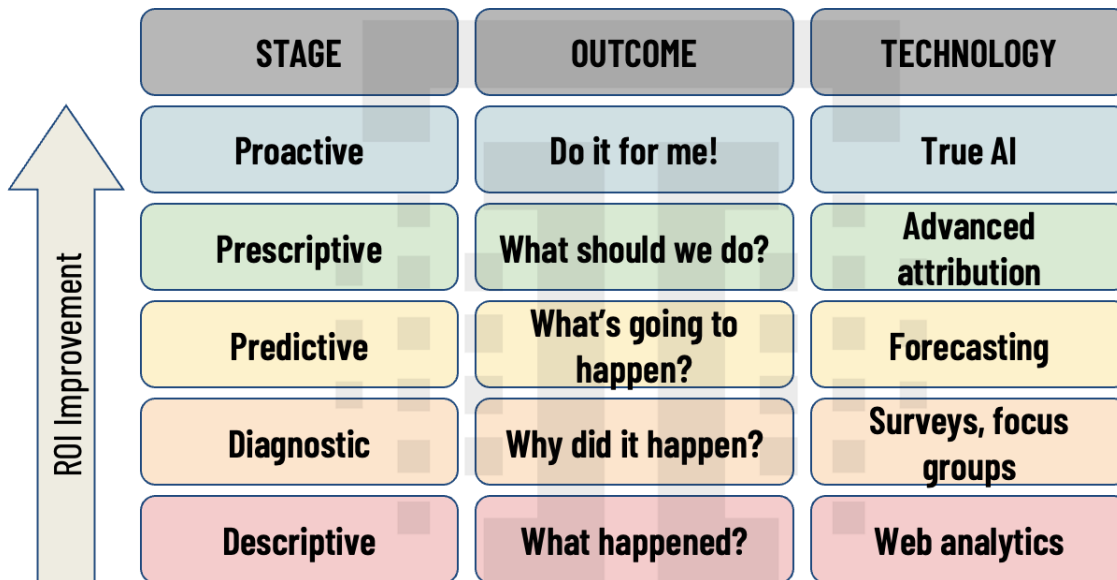
Specificity matters.

Last week on the Livestream, we covered prompt engineering. [You can watch that episode here.](#)

As we talked about it, we were able to draw the parallel between creating a prompt for a machine and delegating a task for a human. You need to be as specific as possible.

To get specific, you need to know what you're working with. That's where the data comes in. If you're not familiar, this is the marketing maturity model.

Marketing Analytics Maturity Model



Most of us, most companies, are stuck at the first step, the "What Happened?" stage of data collection. Even with that, many of us don't collect enough data to help us get specific enough. We want to jump ahead from data collection straight into action. We want to skip the "boring" stuff like requirements and analysis and do something. I get it. We want to start playing with the AI tools and ignore the rest of our marketing tactics that need our attention.

But what if the action you're taking will make things worse? What if it's an expensive decision? What if people lose their jobs because you were impulsive?

Now, in my case, I'm trying to make sure I keep my house plants alive. Lives and jobs are not at stake if I can't keep my philodendron alive. However, if I start making decisions for Trust Insights without understanding the data, I could very well be costing us the health of the company.

So what do we do? Start with user stories. Start with requirements.

As a reminder, a User Story is a simple statement that helps you understand the problem you're trying to solve. It help you focus and points you in a

direction.

As a [persona], I [want to], so [that].

In my case, "As a plant owner, I want to water my plant properly, so that it will grow larger". To make sure that I'm doing that, I have data to collect. I need to get a set of requirements for the idea situation for the plant's environment. What is the right amount of sunlight, water, fertilizer? I need the recipe. I also need to understand what I'm currently doing so I know what to course correct.

[Chris talked about recipes in his newsletter last week.](#)

If we bring the example closer to what you're doing with your marketing, you need to understand your data before you can take action on it. You need to understand the problem you're trying to solve so that you explain the correct recipe. Now that the new year is underway, ask yourself the last time you audited your data collection processes.

Do you feel confident that you're collecting the right data to answer the question you're asked?

You don't have to wait for a new year to audit your data. Why don't you build it into your roadmap to review on a regular basis? Like watering your plants on a schedule, you should be reviewing your data regularly. Getting yourself into a routine will cut down your odds of getting it wrong and/or the problem coming unfixable. By performing tasks on a schedule, you can find issues and fix them before they get out of hand.

For what it's worth, I was overwatering my plants but I have been able to rectify the situation and they already look healthier.

Want to tell me how you're auditing your data (or taking care of your plants)? Reply to this email or [join our Free Slack Group, Analytics for Marketers.](#)

January 18, 2023: How To Improve Bounce Rate

How To Improve Bounce Rate

Let's talk bounce rate. Love it or hate it, it's a metric that people care about. In essence, bounce rate is how long someone spent looking at your hard work.

More specifically, *"A bounce is a single-page session on your site. In Analytics, a bounce is calculated specifically as a session that triggers only a single request to the Analytics server, such as when a user opens a single page on your site and then exits without triggering any other requests to the Analytics server during that session."*

Bounce rate is single-page sessions divided by all sessions, or the percentage of all sessions on your site in which users viewed only a single page and triggered only a single request to the Analytics server.

These single-page sessions have a session duration of 0 seconds since there are no subsequent hits after the first one that would let Analytics calculate the length of the session." ([source](#))

When asked the question "Is a high bounce rate a bad thing?" even Google says, "It depends."

Because it's a community of smart and talented people, I asked our Free Slack Group, Analytics for Marketers what advice they would give on how to best improve bounce rate.

The consensus from the community was that bounce rate is dependent on the goal of the page. For example, pages where you need someone to take action, like a landing page, should have a low bounce rate. If those pages have a high bounce rate, that's where you prioritize content optimization. Pages that are just content, like blogs, for example, can tolerate larger bounce rates

and is dependent on the length of the content.

Another great piece of advice given by the community was to give people lots of ways to consume the content. Did you post a video? Think about adding just the audio file and the transcript as well.

The community also suggests that you do some research into your users and competitors. Look at how your competitors are presenting content and see if there are any tips you can take back to your team. Put yourself in the shoes of your end user. Are you giving them what they asked for, or are you giving them what you want them to consume?

I would also add that if bounce rate is a metric you care about, make sure you're using a piece of software on your site like Microsoft Clarity or HotJar. This type of User Experience (UX) software will tell you more specifically where your users are getting stuck and where they are leaving. From there, you can create a more focused plan to optimize your content to improve your bounce rate.

Lastly, I will leave you with this. Before overhauling your site and your content, is bounce rate the right metric for you? Maybe it is. However, maybe it's just a distraction and there are more useful metrics that you can track and take action on. Something to consider.

What are your thoughts on bounce rate? Reply to this email or [come tell me about it in our Free Slack Group, Analytics for Marketers](#).

January 25, 2023: Growth Hacking Secrets

Growth Hacking Secrets

I'm going to let you in on a poorly kept secret. "Hacking" isn't a thing in business, or in marketing. When you start to unpack the definition of "growth hacking" what you're talking about is process development, optimization, and agility.

That's it. That's the secret.

When you think about hacking, you think about shortcuts, you think about forcing an output, you think about acting without thinking. If you call someone a hack, you don't think they are great at what they do. The problem with hacking something is that you're setting yourself up for the long term. Chris gave me this example earlier:

It's a recipe for disappointment in general because it's often measured in growth percentages. you look great when you go from 10 to 100 users, but going from 100 to 200 is numerically just the same but the short-sighted CEO is like *"we were at 10x growth last month and this month we're at 2x growth? you're fired!"*

A little on the extreme side, but you get the idea.

If you're a growth hacker, this is not an attack on you. Your title doesn't do you justice. This also doesn't apply to a hackathon, which is a collaborative event for software developers.

So, for the rest of this post, let's drop the word "hack". It has too many negative connotations and can lead people down the wrong path.

If you're wanting to grow your business quickly, there are foundational pieces

you need to execute before you take off running.

Process development

I know. You hate documentation. You just do things, you don't think about how you do them. I get it. Well, I have news for you. You need documented process if you want to grow and scale. There is good news. You don't have to write out your steps one at a time (unless you want to). There are other, more efficient options. For instance, you can create a video recording. Record the process and then have it transcribed. We use Otter.ai for all our transcriptions. If you want to take it a step further, you can use a tool like ChatGPT to clean up the transcription and rewrite it into bullet points. There are also a lot of tools that will "create" documentation for you as you complete a task. We've been using Tango, but there are other tools for you to explore. You want to have a process in place for the onboarding of your employees, and onboarding of your customers. Having repeatable processes will expedite your ability to scale. Don't skip this step.

Optimization

Unless you are starting your business from scratch, you likely already have some processes in place. Before chucking those out and starting over again, take another look. Is there room for improvement? Do you know what's not working with your current processes? When was the last time you reviewed and tested your processes? Do you even have repeatable processes in place? Once you're done asking yourself a million questions, start picking apart your current operating procedures. You may find opportunities to introduce automation and artificial intelligence. Note, before you can automate, you need to have a solid, repeatable process. If you don't, go back to process development, and then keep optimizing.

Agility

This might be the hardest thing to achieve but will "hack" your growth the fastest. I know, I said hack. Here's the thing about being agile. When executed well, it looks easy. To get to a place of being truly agile, there is a lot of preparation, process, and planning that needs to happen. You also need a ton of discipline to maintain those processes that allow you to be agile. With time

and patience, you can achieve agility in your business.

So there you have it, the secrets of growth hacking. In case it wasn't clear, there are no shortcuts, aka hacks, to growing your business. Hacking leads to unsustainable and unmaintainable growth. Sure, it could be great for a hot second, but what happens when it stops? What do you have to fall back on?

Do you have thoughts about hacking? Reply to this email or [come tell me about it in our Free Slack Group, Analytics for Marketers.](#)

February 1, 2023: Business Continuity Planning

Business Continuity Planning

Do you have a business continuity plan? If you work at a larger organization, chances are you do. If you work at an organization that handles sensitive data, chances are you do.

Every other day there have been announcements of massive layoffs. Layoffs in the tens of thousands. I have to imagine there are tasks that will fall through the cracks and ultimately not get done at all.

One of the biggest liabilities a company can have is a person. They will have specialized skills, institutional knowledge, and relationships that all live, and leave, with each person.

What if you don't work at a large company, are undergoing massive layoffs, or handle sensitive data? Do you still need a business continuity plan?

The answer is a resounding "yes!"

Now, you likely don't need a plan that is as detailed or as in-depth as a larger company, but you should be prepared for "what if?".

Let's start at the top. A business continuity plan covers the basics around what happens if a disaster (think large scale power outage) strikes, a system goes down, or a principle resource leaves suddenly. The key elements are readiness, recovery, and contingency.

We just went through a very silly, but also useful exercise with me, Chris, and John. We played out the scenario where each of us goes missing and then asked the other team members what they would do next. After a heavy debate on which bounty hunter we'd want to find us (Liam across the board),

we outlined the basic steps we would take to keep the business running.

It occurred to me that this is a good excuse to talk about the 5P Framework. As a refresher, the 5Ps are Purpose, People, Process, Platform, and Performance.

If you're a smaller business or even a solo shop, the idea of creating a business continuity plan might feel daunting. This is where the 5Ps can keep things simple. This is what ours looks like, generally.

Katie

- Purpose: Katie goes missing, and the business needs to keep running
- People: Chris will take point on basic operations and our advisor for communications
- Process: Chris will reach out to accounting and our advisor. The advisor will reach out to the clients to let them know that any interruptions in service will be brief while there is a change in management
- Platform: Using a pre-written list of the most used systems, Chris gains access to Katie's systems
- Performance: Trust Insights doesn't lose clients, and invoices go out on time

Chris

- Purpose: Chris goes missing, and the business needs to keep running
- People: Katie will take point on communications and a contractor for client work
- Process: Katie will bring on a contractor to get up to speed on Chris' code that powers the client deliverables. Katie will communicate to the clients to let them know that any interruptions in service will be brief while there is a change in resources.
- Platform: Using a pre-written list of the most used systems, the contractor will gain access to Chris' code and systems
- Performance: Trust Insights doesn't lose clients, and deliverables go

out on time

John

- Purpose: John goes missing, and he wants to stay missing. We respect his wishes.

You get the idea. This is obviously a very quick and dirty version of our plan but while walking through this exercise, we realized that we did not have adequate backups of our code. We were able to remedy this situation and now have a process in place to keep backups of the code in a place where the proper resource can access it.

You don't need to have an elaborate business continuity plan but you should have a general idea of your systems and what key team members do. You may not be able to document every single thing that someone does but you should have a basic idea of the systems they use and how to access them. This will ensure that if the unthinkable happens you can at least keep the business running while Liam Neeson deploys his set of very particular skills to find you.

What does your business continuity plan look like? Reply to this email or [come tell me about it in our Free Slack Group, Analytics for Marketers](#).

February 8, 2023: Technical Continuity Planning

Technical Continuity Planning

Last week I talked about business continuity, and what happens when people leave. But what happens when the software you rely on to run your business makes a major change without warning? This is where you need technical continuity.

A good example of this is when Google gave us ample warning about moving from Universal Analytics to Google Analytics 4. They rolled out the new system in late 2020 and then announced the sunset of UA roughly 18 months before it would happen - this coming July.

By the way, if you haven't moved to Google Analytics, [give us a shout. We can help!](#)

But what happens when you don't get 18+ months notice that you have to start using a new platform, you have to migrate your data, you have to create backups and modify your processes?

Twitter just did this to us. To all of us. Without warning. Since the major change in leadership, functionality has been changing just about every day. Companies and users that rely on that system for their business are scrambling to plan for the unknown. Most recently, Twitter announced that they will shut off free data export access via their API. You can read more about that in the Data Diaries below.

So, back to the question at hand, do you have a technical continuity plan? If you have a business continuity plan, you likely have plans for the departure of key resources and IT systems at the core of your business. But what about the lower profile systems, like your social listening and SEO tools? These won't be a high priority to your executive team, but to you they are completely

essential.

This is where your technical continuity plan comes into play. Much like we talked about last week with business continuity planning, your plan doesn't have to be overly complex. We're going to use the 5Ps again as the structure for a simple technical continuity plan. We can use social listening as the example.

Let's start by understanding what you need the software for:

Purpose: To understand what is being said on social media about our brand and other keywords that we care about. This is a service we offer to our clients.

People: The social media manager that pulls the data and the clients that rely on the output.

Process: We pull daily reports from the system based on our search criteria and make decisions with the data. We package up this data for our clients daily.

Platform: (for this example) Sprout Social

Performance: The data from Sprout Social alerts us to conversations happening online that our clients need to take part in. When we ship insights to our clients, they use the data to make social strategy decisions.

Now that we have a baseline, let's imagine that Sprout Social decides to change course and stop offering social listening (this is not true). They only want to handle social scheduling (again, not true). You've already noted that this is one of the services that you offer, so not having this functionality will have negative financial implications. You have a good understanding of what this software does for you and you can start to prepare for the risk of not being able to use this software.

While you don't have to have subscriptions to other tools, it's not a bad idea

to have a short list of tools that can do similar things to the one you're currently using. When Google made their announcement about Google Analytics 4, many started to look into tools like Matomo and Adobe Analytics. Switching software platforms can be a pain if you're caught off guard, especially when you have a lot of data involved. Having a technical continuity plan can take the (some of) the stress off your shoulders when a platform you rely on makes a major change.

Do you have a technical continuity plan? Reply to this email or [come tell me about it in our Free Slack Group, Analytics for Marketers](#).

February 15, 2023: What to Do When You're Laid Off

What to Do When You're Laid Off

It's no secret that companies are laying off staff left and right. As you read this, you may have been someone that was also laid off.

[LinkedIn has been keeping track of the layoffs, you can read that here.](#)

Personally, I've been laid off once and short listed to be laid off twice. The two times I was short listed to be laid off, I was able to find a new job before it happened. One of those times it was a panic move and I took a job I didn't love. The second time I was able to use it as an opportunity. Regardless, losing your job, or even knowing that you might, is scary and uncertain.

What do you do when you find yourself out of a job?

First step is to breathe. This is easier said than done. We all have different responsibilities and I'm assuming most of us are not independently wealthy. If you're anything like me, you might release a string of curse words, cry, and want to punch something. This is all normal. You need to feel your feelings in order to move past them. Wallow for hot second. Get angry. Eat fries with cheese sauce. It's actually really healthy. Not the fries. Letting your emotions out instead of bottling them up will help you regain your focus faster.

Once you've spiraled (hopefully in a non-harmful way) it's time to start looking around at your options. If you haven't yet joined a community, this is an excellent time to start. Why is this a good move? For a couple of reasons. First, you're not alone. By connecting with your peers and other professionals you'll find support. Second, many community have job boards. Many times, you can find job posting in a community before it is opened up to the public. Third, you can network. This isn't just about finding people that can do you favors. This is about finding other professionals and learning their story.

Understanding what their experience has been and learning about your own journey. You never know where a simple connection could lead you.

There is no shortage of places to find your peers. Here are some suggestions (h/t Justin Levy for many of these):

- [Pavilion](#)
- [Peak Community](#)
- [Content Marketing Institute](#)
- [Marketing AI Institute](#)
- [Marketing Profs](#)
- [Women In Analytics](#)
- [Spin Sucks](#)

This is by no means an exhaustive list. There are thousands of communities on public and private social platforms. Start by doing a search for your skills and industry. There is likely a community for you.

Now that you've got support you can also use this time to hone your skills. I've previously compiled lists of online courses, some free and some paid.

[You can find those here...](#)

[and here.](#)

Much like the communities, this is not an exhaustive list of resources and courses.

When you find yourself out of work, whether it was a surprise or not, take a minute. Evaluate what you want and what you need. You might not be in a position to be picky about your next move, and that's ok. Keep building your network and sharpening your skills. Your day will come. If you're not looking, these tips are still useful to protect yourself against the uncertain.

[If you want to dig deeper into your own public profile, you can check out our free](#)

[LinkedIn course here.](#)

Have thoughts or comments? Reply to this email to reach me directly.

[You can also come join our free Slack Community, Analytics for Marketers](#) and connect with your peers, check out our job board, or just hang out.

February 22, 2023: The Risks of a Personality Test

The Risks of a Personality Test

Do you know yourself well enough to say what your personality type is? Maybe a better question is asking whether or not you've ever taken a personality test, or used one to make decisions about your team.

If you answered yes to any of the above - congratulations! You're normal!

Here's the thing. A personality test can be fun, a light weight ice breaker, or a team bonding exercise.

However, there are a lot of risks with putting too much stock in a personality test.

Responder Bias

Whether we realize it or not, we don't answer a personality test honestly. Well, not completely honestly. We all have an idea of who we think we are, or how we want others to see us. When we're responding to a personality test we're responding with the answers that will give us a desired outcome. If we see ourselves as leaders, we tend to respond in a way we think a leader would. If we see ourselves as introverts, we lean toward the answers that are more inward facing.

Assumptions

I can tell you that I've gotten INTJ on the Myers-Briggs test or that I identify as a Type A. But this won't even scratch the surface of who I am. The risk with using these labels is that they are limiting. If I am truly an INTJ, then as an introvert I would struggle to lead, speak up, and get on stage. If I am truly Type A, then why am I also really good at laying on my couch and doing

nothing for two days straight.

Stereotyping

Very similar to assumptions, once you "know" someone's personality type there is a tendency to put that person into a box and never let them out. The little bit of me that people know publicly is only a small piece of who I am as a whole. If I give a talk about Google Analytics twice, then I become the person that only gets to talk about Google Analytics. The same is true when we try to use personality tests to assess people. If I'm labeled an introvert, I could lose out on opportunities where someone is looking for an extrovert.

Incomplete data

It should go without saying that if you can access a personality test without paying for it, you're not getting something that would hold up in court. Ok, you probably don't need to bring a personality test to court, but you will run the risk of judging and being judged based on the data produced. A personality test doesn't take a lot of aspects of who you are as a person, or what you've experienced, into consideration. Most tests will ask opinions and preferences on made up scenarios. This means it's only going to give you surface level feedback - not an accurate assessment.

But don't just take my word for it. Here is what our community had to say about the topic:

"They're fun to take, but hard to turn into action. And the danger is you make a snap judgment about what "type" a person is, then stop listening to them and just try to manipulate them based on their type. I've learned it's much more important is just to listen to people, ask them what they want, and if they don't know probe gently to find out more. Everyone is different, no one fits neatly into personality tests, and many of those tests aren't even based in science."

"They are based on junk science, putting on my psychologist hat my personal opinion:

The Myers-Briggs and that ilk of personality tests are meaningless bunk - circus tent astrology for the business suit set, and promote existing biases and prejudices. The ones that are based on a mix of pseudoscience and real psychology

are more dangerous. Your employer is legally not allowed to ask about your physical or mental health - the better built tests are a back door to this knowledge, as they can reveal mental health diagnoses to your employer that they have no business knowing (and in some cases, that you may not even be aware of yet yourself) If you can avoid it, avoid it."

"Personality is so fluid. There are long-term traits, for sure, but there's SO much circumstantial variability that those personality types don't reflect."

Want to join the conversation? Reply to this email or [join our free Slack Community, Analytics for Marketers](#).

March 1, 2023: How to Tell Good Advice From Bad Advice

How to Tell Good Advice From Bad Advice

People are willing to tell you what to do, whether you want to hear it or not. This means we often get a lot of really bad advice. Like, really really bad.

I asked our Slack Community, Analytics for Marketers, what the worst advice was that they ever received was. As usual, the community did not disappoint. Here are some of the highlights:

- Trust no one. If you're going to succeed, you have to do it by yourself, or else someone else will steal everything you've worked for.
- You're too nice, you need to be meaner.
- You need to spend more time focusing on bringing new clients into the business instead of those who are already here.
- The only reason people respect you is because you work with me.
- If you are a good lieutenant everything else will take care of itself.
- You don't move forward with anything unless you're sure about it.
- Stop showing emotion, it's a weakness.
- You need to stop working on improving your skillset and start engaging in office politics. It's the only way you are going to ever get anywhere.
- You need to make sure the men in charge feel good in meetings, you're right but you need to soften your tone.

That last one is especially gross, but sadly not uncommon. Do you see the pattern with this advice? Aside from it being flat out terrible and damaging, it's screaming "I'm insecure!" When you're getting advice, examine the source. Do you think they are trying to set you up for success or are they sabotaging you? There are a lot of people who will say things like, "Do as I say, not as I do" but actions speak louder than words. If the person who is

dolling out advice is not someone you respect or aspire to be like, it's probably not the right advice for you.

On the flip side, I asked our community to tell me what some of the best advice was that they received. Here are some of the responses:

- Complaining and judging reveals more about your (poor) character than the person or object receiving the judgement.
- Praise in public, correct in private
- I was once told to always stay two steps ahead of your manager. This way you're always prepared for when they may ask for data, a project update, etc. Not only does it show you as being responsive and prepared but if they're being asked for an update from their boss, it serves them well too.
- Second bit of good advice: keep a brag bin. Anytime you get a complimentary email, call, Slack, etc public or private, put it in a brag bin folder. This does two things: when you're having a tough day it's a good pick me up, and when it's time for raises and reviews, it acts as proof points for your manager.
- Be nice to people on your way up because you'll meet them again when you're on your way down.
- If you're a manager, you're not responsible for any of the success. All praise should go to your team members, and you should recognize them often publicly.
- It's nice to be important, but it's important to be nice.
- College only gets you your first job, the rest is who you know.

Wow, what a difference! This set of advice has a lot to do with being thoughtful, empathetic, and a good person. Just like looking for red flags when you're getting advice, look for the green flags too.

How do you know who to get advice from? As stated above, look at their actions. Do they behave in a way that you yourself would? Do their actions make you cringe? If your gut is saying, "this isn't the advice for me", trust it.

Say thank you and move on.

Do you want to connect with a community that is full of good advice? [Join our free Slack Community, Analytics for Marketers.](#)

March 8, 2023: Starting Over the Right Way

Starting Over the Right Way

You know what really, really sucks? Starting over. Sometimes the best-laid plans really don't work out and you have to scrap everything and rethink it all.

That's where I'm at with one of the aspects of the business. Heading into the new year, I had very clear plans on how I wanted to grow Trust Insights. The challenge with the plans is that there were dependencies.

Fast forward two full months into 2023 and the dependencies that I needed to make the growth plans start to happen have fallen apart. It's maddening. It's frustrating. It's demoralizing.

We spend weeks, sometimes months, at the end of each year making plans for the next year. Because we invest all that time, we feel like we have to see the plan through, come hell or high water. The risks and losses become very high.

Why do we do this to ourselves? Make plans, etch them in stone, and then kick and scream when we have to make changes? Because it's how we've always done it.

Maybe the plans that you outlined were fine but they didn't account for a major disruption, like ChatGPT. Maybe your plans were fine until you lost a key resource. Or, maybe your plans were working until your audience changed their behavior.

Whatever the reason, it's ok to start over. Let's do it together, piece by piece.

Do an audit

Before you can fix what's broken, you have to know where it broke. It may be one piece or all the pieces. In software development, this is a post-mortem. The idea is that you review everything that you've done to that point. You discuss what went well and where there is room for improvement. This can be a tough conversation so my #protip to you is to have a mediator. This should be someone that can direct the conversation to ensure that it stays professional and productive. The outcome of this exercise should be a list of things that you need to improve upon.

Make a new plan

If you made it through the post-mortem, you can survive this next part (mostly) unscathed. You have your list of items so you need to start over and come up with a new plan. And then a backup plan to that plan in case the new plan doesn't work. More plans? Yes. More plans. This is a great excuse to remind you of the simple 5P framework that can help expedite your planning.

The 5Ps are:

- Purpose (what is the problem we're solving?)
- People (who needs to be involved?)
- Process (how will we solve the problem?)
- Platform (what tools do we need to solve the problem?)
- Performance (how do we know we solved the problem?)

If you can answer those five simple questions you have built a measurable plan.

Do an audit

Wait a minute, didn't we do that already? Yes, and we're doing it again. Auditing your plans regularly will prevent you from having to start all over again. You have a better chance of catching something that is about to go off the rails with your plan when you regularly review. Once you audit, you make a new plan. Then you execute the plan. Then you audit that plan. Then you make a new plan. Then you execute the plan. Then you audit that plan. Then you make a new plan. Then you execute the plan. The key here is consistency

and measurability. Plans that you can't measure will be difficult to audit. Auditing a plan with no measurement is a waste of time.

If you find yourself in a situation where you have to ditch your plans and start over, you're in good company. It happens to us all. To prevent heartache, set yourself up for success by developing measurable plans and audit them on a regular schedule.

Have you had to start your plans over? Reply to this email or tell me in [our free Slack Community, Analytics for Marketers](#).

March 15, 2023: Five years of Trust Insights - Lessons Learned

Five years of Trust Insights - Lessons Learned

(Almost) On this day, five years ago, I sat in my quiet house, stared at my laptop and then...nothing. I had no idea what I was supposed to do. I didn't have a routine. (I felt like) I had no idea how to run a business. I mostly just panicked.

After about an hour of that, and second guessing my decision to leave a steady paycheck, I started to make a list. A few lists, actually. A list of things I didn't know but should, a list of things I knew but wanted to double check, and a list of things that I had zero clue about. You can probably guess which one was the longest.

Fast forward five years, and as I sit here, listening to the storm outside pelt against my windows at 6 am, I realize how far we've come. How far I've come. Let's get into it, shall we? Here are some of my lessons learned from the past five years.

Some things don't matter as much

When we launched the business, I recall that we agonized over the name, the logo, the website, and the first post. We spent a lot of time trying to get it just right. Looking back, we focused on the wrong things. Yes, the name of your company and your outward appearance are important. In our case, they weren't as important as clearly defining our services and processes. We did these things in reverse order and if I had it to do again I'd re-prioritize.

Some things matter in a big way

When you're starting a company, there are a lot of details to take care of. As a brand new company owner, I didn't think twice about using a personal address or cell number to set things up. If I knew then what I know now, I

would have used a PO Box and a Google number that forwarded to an inbox. It's easy to get wrapped up in the excitement and stress of setting things up, and these details can have a big impact in the long run. What if I move? What if I change my number? I'll have to go back through all our paperwork and make sure everything gets updated. That's going to be a huge pain that I'm not looking forward to.

Change happens when you're not looking

Over the course of these past five years, we've all settled into our own daily routines. We have our virtual morning standup, we have our lists, we have our calls. There are tasks that happen on certain days, each week and each month. I couldn't tell you when that started to happen, it was gradual. However, I can, with certainty, now tell you by team member what each day of the week will probably look like for them. When I think about how much has changed, I think about our collective level of comfort and confidence in the success of the business. I think about the predictability and how well poised we are to adapt to new things. When you stop and look around, you'll see that where you started is far from when you ended up.

However, some things don't change

Speaking of confidence, it's normal to feel like you're constantly flailing, even when you're not. Some days, for at least part of the day, I feel like a fraud. No matter how long I've been doing something, I still have doubts that I can do it. And then I do it anyway because I actually can, and will. When faced with a new challenge, like starting a business or taking the stage to speak, it's normal to feel like you are in over your head. Part of me doesn't want that feeling to go away. Why? Because if the challenge goes away, if it all becomes too easy, then I'm no longer growing and learning.

Growth isn't linear

Something that I've learned about growth is that it doesn't always go up and to the right. Actually, real sustainable growth rarely does. Growth isn't, and should, only be about your success. Growth needs to also be about a failed launch, an unsuccessful client relationship, or an outright rejection. I've learned to embrace the losses as much as the wins. There is a lot to learn when something doesn't go as planned. That's where the real growth

happens.

Intelligence is subjective

One of the biggest lessons I continue to learn is that intelligence looks different in every context. Intelligence is another way of saying experience. The phrase "smartest person in the room" often equates to "the person who has been doing it the longest and continues to hone their skills". When I look around at our community, our network, and our clients, I'm proud of the diverse backgrounds, journeys, and stories. No one person is more intelligent than the next. That feeling of "I'm not smart enough to be here" has evolved into, "What can I learn from this person".

So what's next?

As much as I'm a planner, I'm not. I know I want us to produce more courses, and what those courses will be. I know what the next evolution of our website and services will be as well. I have an idea of what success looks like for Trust Insights in another five years. What I don't know (yet) is how the ever changing technology landscape will shape the value that we bring to our clients. I don't know (yet) how my career will change and what opportunities I'll have. I can try to manifest what I want to see happen by outlining it, but that's not how I roll. I'll mull over a few different ideas, conduct my research, and eventually something will click. Otherwise, what's next is that I keep my eyes and ears open. I don't shy away from non-traditional things. I don't create plans so structured that they are unchangeable.

If you were hoping that I'd be giving a rundown of what services we started with and what we'll be offering over the next few years, I'm sorry to disappoint you. We will be covering that on our Livestream this week. You can catch that on our YouTube channel, this Thursday at 1pm EST.

In the meantime, I'd love to hear from you and what lessons you've learned over the years.

Reply to this email or tell me in [our free Slack Community, Analytics for Marketers](#).

March 22, 2023: How Do I Know if My AI Information Is Correct?

How Do I Know if My AI Information Is Correct?

Unless you're living under a rock, you've probably heard a thing or two about all the advances in AI over recent months. ChatGPT is dominating the conversation but they aren't the only game in town. For the purposes of this newsletter, though, we'll pick on ChatGPT - just a little.

Reminder, tools like ChatGPT have a lot of great potential and we're already seeing the disruption of how we work. I'm a big fan of these tools and I think that they will help us refocus on really important work, while helping to automate more of the repetitive pieces. Keep in mind that this is not a post hating on ChatGPT. This is a remind to you, the end user, to use your noodle.

Since it has become available, the majority of users look at ChatGPT as a way to research and write content. Ever the skeptic, my first question is, "How do you know if the information is correct?"

The short answer is that you don't. Just like looking up something on the internet, taking the results at face value can be dangerous. Unless you're using GPT-4 through the Bing interface, it otherwise doesn't cite its source of information.

Chris told me that he was using ChatGPT to help him write code. I asked him how he knew if the code the system was writing was correct. He said that he had to go back through it and make sure it was what he intended. I could ask ChatGPT to write code too. But because I'm not a developer I would have no idea if it was correct and if I take it at face value it could be a risk to my project and my business.

When you start extending that scenario into how quickly ChatGPT can create content, the risks of misinformation start to get even higher. Some

companies are using these systems to churn out thousands of pieces of content without doing a thorough fact check of each piece.

Here's a simple example. We asked ChatGPT: What do you know about Katie Robbert?

This is what it told us.

There is a person named Katie Robbert who is the CEO of Trust Insights, a marketing analytics and data consulting company. She is also a professor at Rutgers University and has been a keynote speaker at various conferences on topics related to marketing, analytics, and data science. Additionally, she co-hosts the podcast "Punch Out With Katie and Kerry" where she and her co-host discuss various topics related to marketing, business, and technology.

If you don't know me that well, you'd think this was a reasonable response. Well, friend, the devil is in the details. This is about 90% correct. However, I do not at this time, have any affiliation with Rutgers University. (I am however open to the possibility).

The point is, if you don't read carefully or aren't a subject matter expert you could miss the incorrect information.

When we recorded our podcast, In-Ear Insights, the other day, we were walking through developing prompts. We decided to use "SEO in 2023" as the topic. We built the prompt, ran the query, and ChatGPT gave us a first draft of tactics that will be relevant for SEO in 2023. It said things like, video optimization and voice search.

To me, this was helpful advice. However, when Chris read it, he said that the advice was about five years out of date. The challenge is that I'm not a subject matter expert in SEO so I would have read this draft and thought it was good enough.

The examples I'm giving are pretty low risk. What happens when you start asking for content that involves medical advice or other high risk topics?

There has to be a way to know if the information is correct, right?

Right.

Do your homework. Before you ask a tool like ChatGPT to write a post or develop code for you, make sure you know all the facts. In the example above where we ask the system to write a post on SEO in 2023, my first mistake was not being up to date on the latest SEO tactics. The way to get around the misinformation is to include the relevant facts in your prompt before asking the system to write for you. You can be as specific as you need to be. ChatGPT (on its own) isn't a search engine, you shouldn't be using it as one. Use it to rewrite your content, to summarize notes, to assist you, the expert.

This is the old, "Will AI take my job?" question. In this instance, if you're a subject matter expert, the answer is no. If you know how to research a topic, the answer is no. If you know how to fact check, the answer is no. Humans need to, and continue to be, in charge. Not the other way around.

Are you using ChatGPT? Reply to this email or come tell me about your experience in [our free Slack Community, Analytics for Marketers](#).

March 29, 2023: Tips to Stay Productive and Motivated - From Real People!

Tips to Stay Productive and Motivated - From Real People!

Staying productive and motivated is hard for most of us. I thought I could save some time and have ChatGPT tell me the best productivity tips, but honestly, it was generic and I felt talked down to. Here is what the system told me:

- Set clear goals
- Prioritize tasks
- Create a schedule
- Minimize distractions
- Take breaks
- Get enough sleep
- Exercise regularly
- Delegate tasks
- Use productivity tools
- Stay motivated

Not super helpful, right? The content that ChatGPT wrote gave more explanation for each item, but it was still very condescending. It reads very impersonal and matter-of-fact, like being productive is a switch you can just flip on and off. I don't know about you, but that's not how I operate.

Instead of asking a computer, I thought it would be useful to you (and me) if I asked real people how they stay productive and motivated. This is what our Slack Community, Analytics for Marketers had to say:

"I handwrite a weekly to-do list. Something about the tactical nature of a quality pen and paper helps me to center and really focus on the essentials for the week. I turned off new email pop-ups and check email at selected times throughout the day. Same thing for new Slack messages. I block chunks of time throughout the week for focus work. I usually do this on Friday for the following week. I virtually co-work in flow club for accountability. I take screen-free breaks, preferably outside, to help recharge my energy"

"I'll turn emails in Outlook into appointments to block chunks time to do them. I keep a daily update in OneNote of what I need to do and what gets done (comes in handy when the boss wants to know what I've been up to)"

Now, this advice is much more helpful and actionable. I like the tip about turning your emails into calendar appointments. Then you can more easily set expectations with the recipient about when you'll get back to them and get answers. Personally, I also really like handwriting a to-do list.

The only other piece of advice I would add is to prioritize your task list by effort. You can assign sizes like small, medium, or large. This helps you internally set your own expectations of what you can accomplish given the time you have available.

To round out the practical advice on productivity and motivation, I would be remiss if I don't mention that there are lots of tools that can help. You can customize these tools to mirror how you work. This is by no means an extensive list - but these are some of the tools that I've used and have found helpful:

Asana - This is the app we use at Trust Insights. We like that it can integrate with Slack and can easily handle repetitive tasks. It's also easy to organize by project and invite collaborators.

To-do (from Microsoft) - This is the app that I personally use for my own lists. Yes, lists. It syncs between my desktop and my phone. I have shopping lists, packing lists, to-do lists, and ideas.

Trello - I don't currently use this but I have found it an effective tool for keeping a larger team organized. I used to use it when I ran morning stand-up meetings. These are meetings where every team member takes a minute to say, 1) what they completed yesterday, 2) what they are working on today, and 3) where they are blocked. If you have a larger team, whether in person or virtual, you can set up Trello to mirror your daily stand-up.

Pomodoro timers - There are a lot of versions of these timers. The idea is that you work for 25 minutes and then take a break for 5. If you use a system like slack there are integrations that are helpful for keeping your head down to get things done.

How do you stay productive and motivated?

Reply to this email or come tell me your tips in [our free Slack Community, Analytics for Marketers](#).

April 5, 2023: Getting Started with a Marketing Mix Model

Getting Started with a Marketing Mix Model

I said to Chris earlier, "I feel like everyone is suddenly talking about running a Marketing Mix Model. It's not new, right? Why is it suddenly such a popular topic?"

He told me one of the big reasons is data privacy. Attribution models, which are similar, but not the same, will struggle to be accurate and valuable as data privacy continues to restrict the data they can access.

What does that mean?

Have you noticed in your Google Analytics account there is more "unassigned" and "direct" traffic, even if you're being diligent with your UTM tagging? This is because of the data privacy regulations that are protecting the users visiting your website. This means that attribution models, like the ones you can get from Google Analytics, will be less and less effective in telling you which channels are working.

As a quick refresher: an attribution model tells you what gets credit for a user taking a specific action. Most commonly in marketing, we use attribution reporting to understand what actions led to certain conversions, like opening an email led to a form fill. A marketing mix model is a large regression model. A regression model is trying to understand the relationship between variables, such as weather patterns and revenue. You can still try to understand what actions lead to conversions, but a marketing mix model allows you to introduce more data. The analysis can then tell you the relationship between the variables. For example, you bring in more sales when it's sunny outside because you're a brick-and-mortar shop and nice weather means more foot traffic.

Here's a real example from this morning. Chris and I were working through the monthly reports. We run attribution reporting for ourselves and our clients. Because I know our data so well, I flagged what looked to be some inaccuracies. Fast forward two hours later and as we're peeling back the layers, we're realizing that there are major discrepancies between what we get from our own website, and what Google Analytics tells us. Further, there are discrepancies between the Data API and the Google Analytics interface. I shouldn't have to mention this but also know that there are HUGE discrepancies between Universal Analytics and GA4. We know what the metric should be, and yet none of our data sources match. The issue here is that we're restricted to one data set for the attribution model. With a marketing mix model, we can look outside the problematic data for something more accurate.

Before we can get into the analysis, we have to take inventory. The example above demonstrates why you need to do requirements gathering and have strong data governance before running a marketing mix model. If you don't have a good handle on what your data should tell you, a complex analysis won't help. Let's do a quick run-through of the 5Ps so we can understand what we're working with. As a refresher, the 5Ps are Purpose, People, Process, Platform, and Performance.

Purpose

This is where you'll state the reason you want to run a marketing mix model. The best way to organize your thoughts is with a user story.

As a [persona], I [want to], so [that].

A #protip is that the user story tells you what the other Ps are. "Persona," tells you the people, "want to," tells you the process and platform, and "that," tells you the performance. Here's what mine looks like:

As a CEO, I want to understand which of my digital marketing efforts are resulting in sales, so that I can prioritize budget and resources.

In this statement, I have a lot of information. Let's keep breaking it down.

People

I stated that I wanted to understand the data, so I'm the first person involved. Knowing that I am not solely responsible for Trust Insights data collection and analysis, I can reasonably assume that Chris will be involved as well. Since we're also talking about sales information, John will need to participate.

Process

I stated that my purpose was to understand my digital marketing efforts and sales. In terms of process, this statement tells me that I need to do a couple of things. I need to know how that data is being collected, the frequency, and the format. This is where I need to have data governance in place so that the data collection processes aren't what holds up running a marketing mix model. Once I identify which systems I need to extract data from (in the next step), I can circle back up to the processes, making sure that I can export the data needed. If I can't, I'll need to develop new processes and work them into the overall plan. I will also need to create a process to clean and normalize the data once it's extracted so that I can analyze data from different sources. If I were getting the user story from a stakeholder, I would probably push back and ask for a more specific timeframe as well. This is where you will likely spend most of your time, between process and platform. With a marketing mix model you can have multiple data sources that won't necessarily export into the same exact format, meaning you have to build process to combine your data for analysis. And the more data you want to use from different platforms, the more process you'll need to develop. Especially if you want to rerun the marketing mix model again and again.

Platform

Using the middle of the statement again, I stated that my purpose was to understand my digital marketing efforts and sales. This tells me which platforms I need to be extracting data from. Because I want to understand sales data, that is going to be either my CRM or accounting software. I also want to understand my digital marketing efforts. This means I need to first know what all the digital marketing tactics for Trust Insights are, and then I need to figure out which platforms have data I can extract. LinkedIn, for

example, is notoriously stingy with data extraction so that could be a problem if that's a channel I care about. I could easily end up with data from half a dozen, or more, platforms. Whereas with an attribution model, you typically only have data from one, maybe two sources. Having a thoughtful and detailed user story will help ensure that I don't go off the rails trying to pull data from every possible system I have running. My user story states, "digital marketing efforts". If I have a lot of campaigns and tactics running, I might narrow that down to a few channels or even a smaller date range to keep it more manageable.

Performance

This is the last piece of the user story. If you aren't creating a user story with a measurable outcome, try again. In my user story, I stated that I wanted to be able to prioritize resources and budget. Well, that's a crappy outcome. It might be true, but it's not super measurable. How will I know that I did that, prioritized? The recommendation would be to go back to the user story and rewrite it to be more precise. Another version might say, "so that I can reduce the budget on channels that aren't working and increase the budget where the tactics are bringing in qualified leads".

The other #protip is that you don't have to do People, Process, and Platform in any particular order. You might know the platforms, which will inform the process, and then the people. But do not skip these Ps.

When I look back at my initial audit, I can see that I have a lot of work to do before I can consider running a marketing mix model. The good news is that I can choose to break it down into smaller, more controllable pieces. I can also build out the processes so that they are repeatable and I am extracting data regularly, allowing me to more easily rerun the marketing mix model. If I go that route, the upfront development will take longer but then running the analysis will be much more efficient.

The point here is that a marketing mix model can be a really powerful part of your analysis portfolio. However, like with any project involving data, you'll want to make sure you're taking the time to set yourself up for success. I know - that's the part we all want to speed through but trust me, taking

shortcuts here is not worth it.

Are you building out a marketing mix model?

Reply to this email or come tell me about it in [our free Slack Community, Analytics for Marketers](#).

April 12, 2023: An overview of generative AI

An overview of generative AI

We've well established that of the two of us, Chris is the technologist and I am not. Not to sell myself short, but I'll never be as in the weeds with technology like he is. That's not to say that I don't understand it and can speak the language well enough.

I joke that it's like sports, I understand enough to hold an intelligent conversation. I know which teams are winning and who the star players are. I know the rules of the game and what the fans care about. Once you start digging into the stats of individual players and having strong opinions of local versus national commentators, I'm out.

With that context, I want to talk about what you, a marketer who isn't a data scientist, needs to know about generative AI. This is a topic that for a lot of reasons, including the future of your career, you should have a good understanding of.

In this week's podcast Chris and I talked about what generative AI is. We got pretty technical, so I wanted to provide a more user-friendly version.

[If you want to technical version, you can listen to the podcast here.](#)

If you want even more resources about AI, check out our friends over at the [Marketing AI Institute](#).

Let's start at the top. As stated in the podcast, Artificial Intelligence is an umbrella term for programming computers to replicate human intelligence tasks of all kinds. There are three main areas of Artificial Intelligence: Regression, Classification, and Generation. Regression is the finding of the

information. Classification is organizing the information, and Generation is creating something with what you have found and organized. Personally, I struggle to remember the three types of AI most days. I can usually remember two, and never the same two. Try this instead, FOG - Find, Organize, Generate. First you have to find the information, then you have to organize it to be able to use it, then you can generate what it is that you need.

What I have learned is that you cannot have only one kind of AI. You need all three to work in concert to have a valuable output. Now that we all have a basic understanding, let's dig deeper into generative AI.

Everyone, and I mean everyone, is talking about generative AI. Well, more specifically they are talking about ChatGPT and similar systems. The ChatGPT interface works by using generative artificial intelligence. Since we're all obsessed with this shiny new toy and trying to figure out how to use it to do our work, let's make sure we know what we're getting into.

Generative AI is exactly what it sounds like, it generates things. Ok, that's straight forward. If you recall back about twenty seconds ago, we stated that generative AI needs regression and classification to operate. Great, still not overly complex. Here's where I want us to focus - what generative AI cannot do. A lot of us have gotten wrapped up in letting AI write our content for us that I wanted to take a moment to understand where it's generating from.

Generative AI relies on information. You need to feed it something to work with. This means that generative AI, and systems like ChatGPT are not creating original content. Think about the music industry. You could argue that you cannot write an original melody anymore. There is not an infinite number of musical notes to use. If that's true that means all "new" music is referencing something that was already published.

Sometimes it's a straight up sample, like how Montell Jordan's hit, "This is how we do it" samples Slick Rick's, "Children's Story". And sometimes it's copyright infringement, like how Ed Sheeran went to court for seemingly sampling "Let's get it on" in his song, "Thinking out loud."

If you ask ChatGPT to write you a song, it will first go to all the resources it

has to understand what a song is. Then it will reference those resources to write the song you asked for. Is it original content? Sort of. You run the risk that the lines written are an exact copy of something pre-existing, even if they are new to you.

The point is that generative AI cannot create something that has never existed before. It relies on finding existing reference material to understand what you're asking it to do. This is why the topic of "AI generated content" is such a big deal in marketing. We work hard and take days (sometimes weeks) writing our blogs, white papers, and social copy. Systems like ChatGPT can write it in a matter of moments. However, unless you are diligently editing, you could be publishing something that is copying pieces from other posts. This won't do you or your brand any favors.

In some cases you want generative AI to replicate what already exists. You can ask for a recipe for pizza dough. The system will find references of making dough, organize the information into a consumable way and then generate a recipe for you. In this instance, referencing pre-existing content is what you're after. But again, the AI isn't making it up, it's looking at what's already out there. It needs to learn first and then create.

As generative AI get more sophisticated, we need to understand the basic mechanics of how it works so that we can learn to use it properly. Over the next few months, it will be harder to tell the difference between human generated and AI generated. To be fair, it's already difficult and we didn't even cover deep-fakes. The models that power generative AI will learn faster, become more refined, and generate content that mimics specific tones and voices more closely. If you want to stay a step ahead and use AI, you need to understand what it can and cannot do.

Are you using generative AI?

Reply to this email or come tell me about it in [our free Slack Community, Analytics for Marketers](#).

April 19, 2023: Understanding Your Technologist

Understanding Your Technologist

This week, I wanted to try an experiment. I've been working on content about the challenges non-technical managers will face when managing a technologist. Think about the roles Chris and I play. I need to understand enough of what he's doing to support him, and he needs to understand enough of my role to allow me to prioritize and advocate for him.

In the spirit of that, I've been working on using ChatGPT prompts to emulate the kind of work Chris would do. I decided to let ChatGPT write this week's newsletter. There was some editing, but otherwise, this is what the system wrote after learning a little about my writing style.

With the rise of AI technology, the business landscape is changing rapidly. As a result, subject matter experts and technologists are becoming more prevalent, and the need for traditional managers is declining. However, this doesn't mean that managers are no longer needed. In fact, they are still essential to the success of any organization, particularly when it comes to managing technologists.

For managers who lack a technical background, managing technologists can be a daunting task. They may feel overwhelmed by the specialized knowledge and terminology that technologists use, and struggle to understand what is truly important. This can lead to misunderstandings and communication breakdowns, which can ultimately undermine the success of the organization.

To avoid these challenges, it's important for technologists to help managers understand what's important. This means explaining technical concepts in simple terms, and focusing on the big picture rather than getting bogged

down in details. Technologists should also be proactive in identifying potential issues and risks, and bringing them to the attention of their managers.

At the same time, managers need to advocate for their technologists and prioritize their needs. They need to block distractions and ensure that technologists have the resources and support they need to succeed. This involves spending time asking the right questions, such as "why did you choose this solution and not something else?" or "what will the risks be to our customers with this solution?"

However, it's important for managers to approach these questions with respect and humility. They should never assume that technologists will automatically understand their perspective or priorities. Instead, they should work to build a collaborative relationship with their technologists, based on mutual respect and understanding.

Technologists, in turn, need to understand the role of the manager and collaborate with them to achieve shared goals. They should be willing to explain technical concepts and help managers navigate the complexities of the technology landscape. By working together, managers and technologists can achieve a successful outcome for their organization.

Ultimately, managers need to focus on relationship power rather than role power. They need to build strong relationships with their technologists, based on trust, respect, and mutual understanding. By doing so, they can create a culture of collaboration and innovation, where everyone's skills and strengths are valued and leveraged.

In conclusion, the rise of AI technology is changing the business landscape, but managers are still essential to the success of any organization. To manage technologists effectively, managers need to prioritize their needs, advocate for them, and build strong relationships based on trust and mutual understanding. Technologists, in turn, need to help managers understand what's important and collaborate with them to achieve shared goals. By working together, managers and technologists can build a successful and

innovative organization in the rapidly changing world of AI technology.

Overall, not too bad. This exercise, while simple, is helping me understand Chris' perspective when he talks about prompt engineering and model refinement. The prompt that I used needs some work, and the model needs more data to learn my voice. These are things that Chris focuses on and studies daily. It's not good enough for someone without his skillset to start doing it and assume they will be just as good. For me, I now have a better understanding of the time it takes to get it right. Knowing that ChatGPT can generate content quickly doesn't mean that it's the version that we'll use. It needs rounds of revision and editing.

If you're a manager who is working with a technologist, I would strongly advise you to do a similar exercise. You don't need to get it right, but at least attempting to step into their shoes for a moment can help you to better communicate on their behalf and have more patience with outputs.

What is your experience being a manager or a technologist?

Reply to this email or come tell me about it in [our free Slack Community, Analytics for Marketers](#).

April 26, 2023: Look Before You Leap Into a Large Language Model

Look Before You Leap Into a Large Language Model

Are you thinking of introducing a large language model, like ChatGPT into your organization?

I'm here this week to be Captain Buzzkill. Why? Because you're probably not ready.

Let's take a step back and review the foundational pieces that need to be in place first, before you're ready for Artificial Intelligence.

The best place to start is at the bottom, with your data. Specifically, your quantitative data. This is the data that tells you what's happening on your website, how many people downloaded your latest ebook, and how many newsletter subscribers you have.

My first question: How confident are you with your quantitative data? Click on your answer and we'll summarize the data in a future issue.

- [Strongly lack confidence](#)
- [Somewhat lack confidence](#)
- [Somewhat confident](#)
- [Strongly confident](#)

I want you to take a minute and give an honest answer. If you're not strongly, or even somewhat confident in your quantitative data, you're not ready for AI.

To be confident in the quantitative data means a few things. First, you know where all the quantitative data lives. It can be in various systems, or all funneling into one place (like a data warehouse). Next, you know that the data

is clean. If you had to pull the data right now, you'd be able to do so and know that it was correct. Third, you can make decisions with the data.

Think I'm full of bologna? We also need get a handle on your qualitative data, the behavioral data. This is sometimes numeric, sometimes not. Regardless, it's more complex to collect and analyze than your quantitative data. If you don't know why people read your blog, or come to your website, you don't have a handle on your quantitative data. If you put out a video that goes viral and you can't say for sure why, you need to go back to the beginning.

Let me put it another way. Let's say you get the green light to start using a large language model with your marketing team. Everyone is super excited that you can produce content at 100x the rate you have been. This will be fantastic for your SEO and content marketing. Right?

Well, remember, I'm Captain Buzzkill today.

Some organizations are looking to build their own large language models because of the amount of content they have created over the years. It sounds good in theory, training a model on all your content so that it learns your voice, your tone, your quirks.

But what if not all your content hits the mark? What if some of your content has never been seen by anyone?

My questions for you: Do you have a good grasp on where the different pieces of your current content work in the customer journey? Do you know which pieces of content convert? Which pieces drive awareness? Which pieces have fallen flat?

If the answer is no, my next question would be: How long would it take you to find the answer. And to that, how confident are you in the answer. Confident enough to make financial decisions with your data?

This is the crux of the issue. Many companies are eager to get started with AI. I get it, it's cool, has a lot of potential, and every one is doing it. No one wants

to be left out.

The challenge is that the majority of companies aren't ready to introduce AI in a way that will succeed and sustain. Companies are making hasty, sometimes panicked, decisions about how to bring AI into the fold. They are using it as a bandaid to cover up their people (skillsets) and process (data collection) issues.

All to say, a large language model can be a game changer with your marketing. But before you take the leap, make sure you have a parachute.

Are you bringing a large language model into your organization?

Reply to this email or come tell me about it in [our free Slack Community, Analytics for Marketers](#).

May 3, 2023: What Does Everyone Get Wrong About B2B Influencer Marketing?

What Does Everyone Get Wrong About B2B Influencer Marketing?

I wanted to take a break from talking about AI this week and switch gears. Instead, let's talk about something that AI can't do - B2B Influencer Marketing.

At its core, B2B Influencer Marketing is about human connection. At the start of a customer journey is a human and at the end of a customer journey is a human. AI can assist with getting a human through the steps of the journey, but at the end of the day, it's all about a human getting their problem solved.

Where does B2B Influencer Marketing fit in? This is where you find other humans to help the humans that are on the journey get from start to finish.

Since I'm not an expert in Influencer Marketing, I turned to a couple of good friends (thanks Ashley Zeckman and Justin Levy) for some advice. I wanted to know what everyone gets wrong about B2B Influencer Marketing. They did not hold back or disappoint. Here is some of what they had to say:

What does everyone get wrong about B2B Influencer Marketing?

It's boring

One of the misconceptions is that B2B is dull and bland. You're often selling software or services, so where's the fun in that? How can you make compelling content or social posts? If you don't follow Demandbase, you should - [purely for the content they share](#). They very smartly use B2B Influencers that drive really fantastic awareness to their brand. They make it exciting and fun. Their B2B Influencer Marketing program is the opposite of

boring.

Not presenting influencers with campaigns or ideas

This is a misstep in any kind of relationship building. Reaching out to someone and immediately making asks of them is going to start you off on the wrong foot. If you have an influencer in mind that you want to work with, you should take the time to thoughtfully put together ideas that you want them to build on. This way you and your influencer can be more aligned with your goals and their comfort level.

Too much focus on quick wins, skipping the relationship building

This is very similar to the point above. Effective B2B Influencer Marketing means relationship building and trust. This means that it will take time. If you want to find someone to endorse you and then move on, that's fine - but you'll miss the long term benefits. Which leads us to the next point...

Lack of partnership

A lot of companies approach influencers with pre-existing content. A better approach, and a more authentic approach, is to partner with your influencer and co-create things. You'll get the benefit of their perspective and expertise (that's why you hired them, right?) and they will feel more comfortable sharing with their network.

Lack of measurement

Perhaps the biggest area where companies get B2B Influencer Marketing wrong is measurement. This starts with knowing your Purpose (yes, of the 5Ps!) - what is the problem you're trying to solve? When you make the decision to engage with an Influencer, you should have a solid plan in mind not only for what you want them to do, but how you're going to measure impact. Is it for awareness? Is it for engagement? Is it for sales? These are three different goals with three different outcomes. Take some time to figure out what you need, and how you'll determine success.

This is by no means an exhaustive list. B2B Influencer Marketing, like any kind of marketing, has it's own set of skills and education. There is a lot that

can go wrong. But with some thought and planning, B2B Influencer Marketing can go very right!

Are you using B2B Influencers?

Reply to this email or come tell me about it in [our free Slack Community, Analytics for Marketers](#).

May 10, 2023: Mental Health Resources - Mental Health Awareness Month

Mental Health Resources - Mental Health Awareness Month

Hi. If you've been subscribing to this newsletter for a while you know that every now and then I take a break from tech and business so I can focus on you, the person. This is one of those newsletters. In this issue, I'll be sharing mental health resources in honor of mental health awareness month. If talking about mental health is not for you for whatever reason, that's okay. I'll see you back here next week.

I'm Gen X. This means that I straddle the line of learning to keep things to myself (from my baby boomer parents) and being transparent about everything (from my millennial friends and coworkers). It can be tough to navigate, especially when you don't want to "burden" other people with your issues (it's not a burden, I promise). You may have been taught that seeking help was something to be ashamed of (it's not).

In this newsletter, I want to share with you some resources that you may find helpful. You can ignore them, you can use them, it's your choice. You can reach out to me, you can keep it to yourself, it's your choice. You are in control of this conversation.

Did you know that more than 1 in 5 US adults live with a mental illness? For what it's worth, I don't love the word illness. Or disorder, or ailment. I feel that it continues to perpetuate the stigma around talking about and seeking treatment for mental health.

I don't need to delve into my life story with you, but I can tell you that I've had my fair share of failures and tough times. I'm human. So are you. And as a human, I've had to learn how to protect my mental health, make it stronger, and help it recover.

With that, here are some resources you may find beneficial. Feel free to share these with others as well:

[Center for Disease Control and Prevention](#)

The CDC has a good list of resources, from emergency lines to more specific types of support.

If the analyst in you is looking to dig around in the data, the [CDC also lists publicly available data for anyone to review and use.](#)

[American Foundation for Suicide Prevention](#)

The AFSP has a strong list of mental health resources for underrepresented communities.

[Mental Health First Aid](#)

This site has a more extensive, and more granular, list of resources for those looking for specific types of support.

[Mental Health America](#)

If you're looking to take a more proactive approach and help others, this site has a lot of good ideas and resources to get started.

This is by no means an extensive list but rather a starting place. Your journey will be personal to you and finding resources that suit your needs will be as well. Finding support shouldn't be overwhelming.

If you have other resources you have found helpful, please share them with me so I can share them with others. If you are looking for additional support, like a community of people, you can check out mine and join for free - Analytics for Marketers. We talk about more than marketing and the entire

community is open and welcoming. [You can join here.](#)

If you want to talk one-on-one, feel free to reach out to me directly. I'm here. You can reply to this email or find me on social media.

Next week I'll be back to dazzling you with another way to use the 5P framework to make your business run smoother! Until then - take care of yourself.

May 17, 2023: Will AI Make Us Lazy?

Will AI Make Us Lazy?

Will AI make us lazy?

Here's the bad news. AI is new tech, but our laziness as humans is old news. We (myself included) are always looking for fast results, shortcuts, and ways to get out of doing things.

That's not to say we won't work hard. But, we won't work hard for things we don't care about. That's where AI can step in.

Imagine having more time to think, plan, and strategize. However, you can't because you're currently underwater with pulling data, generating reports, and responding to endless emails. As an industry, and as consumers, we need to reframe our thinking about what AI is "doing to us".

AI is not making us lazy. AI is taking repetitive tasks, admin tasks, and computational tasks. Sure, AI writes, can do deep fakes, and even run your customer service department. Where does that leave you? It should leave you time to create stronger content, tune deeper into your audience, and build stronger relationships because you're not bogged down by paperwork.

Let me back up a minute and start with the term, "lazy". Lazy means that you are unwilling to work or use energy to do something. Maybe this describes someone you know. That's fair. I would venture a guess that it does not apply to most people that you know, though. People want to work, they want to put energy into things. But we want to choose where we're putting our energy. Many jobs choose for us. That's why we're burnt out, disgruntled, quitting.

There is this notion that if you're not moving and being productive every second of every day, you're lazy. If you're not hustling, exhausting yourself, and living every single moment like it's your last, you're lazy.

None of this is true. You're not lazy if you're not doing those things. You're human and humans have limits. Those limits look different for each of us. For example, I don't have the physical and mental stamina to travel all over the country doing speaking engagements every week. Chris does. Does that make me lazy? Not at all. We're different people with different passions, priorities, and limitations.

Back to AI. Yes, AI will take tasks, take jobs, and make people rethink their processes. That is all true. You, the human, get to make choices about what that means for you.

I asked our Slack Community, Analytics for Marketers, this same question. Here is some of what they had to say:

"Doesn't the question assume that we are not already lazy? I don't think that's a safe assumption. Besides, there were arguments back in the day that literacy would make us lazy. It's the wrong question."

"How and why we are using it will be on a spectrum. Some will use it to get out of doing any work. Some will use it to free up time from menial tasks to focus on what is important. The rest will fall in between somewhere."

"Laziness" is an American problem. The rest of the world just calls it "living"."

"Depends. I think it has the potential to open up our time and minds for some of the more creative work we push aside because we get bogged down with more mechanical work."

So, will AI make us lazy? It's the wrong question to be asking. The right question should be, "How will AI give us time to reprioritize what matters?"

What do you think about the future of AI? Reply to this email, or [come join the conversation in our Free Slack Group, Analytics for Marketers.](#)

May 24, 2023: Are Your AI Choices Harmful to Your Business?

Are Your AI Choices Harmful to Your Business?

Are your AI choices harmful to your business? Let me explain.

As you likely know, AI is still dominating the news cycles (see Chris' analysis below). This means that companies are trying to stay relevant, join the conversation, and embrace the technology. The challenge here is that AI is evolving at such a rapid pace that doing so means that by the time you publish, your article is out of date.

This is not an anti AI post. Not in the slightest. This is a...you guessed it...5P post. Ah, sneaky sneaky.

AI can do a lot for your company. That should be a given. It can help you operationalize tasks, make processes more efficient, and even fill in the gaps where you're lacking staff.

There is a flip side to all this though. With AI changing so quickly, it can feel daunting to keep up with all the new bells and whistles. Just a few short weeks ago, major companies were hiring for prompt engineers. Now, a lot of these roles are already obsolete.

So, how do you keep up with AI and not waste a lot of time and resources?

Be clear on your Purpose.

As stated, AI can do a lot for your company. But that doesn't mean it needs to do everything all at once. Introducing too much change can do the opposite of what you want. People can feel overwhelmed and easily become disenchanted with the new technology. If it's "one more thing" to think about

for your team, it's not helpful.

Start with your user story. As a reminder, a user story is a simple statement with three key parts.

As a [persona], I [want to], so [that].

For example: As a [CMO], I [want to use ChatGPT], so [that we can increase our content production].

That statement tells us that the CMO wants to use AI to increase content. Pretty straight forward. You can use AI to do this a few different ways. This is where you need to get more specific with your purpose.

If we start picking apart the user story we can ask follow up questions like:

- Is ChatGPT the right tool?
- Do we want AI to write the content or just a draft?
- Do we want AI to edit the content?
- Do we want AI to replace the writers on the team?
- Do we want to increase headcount?
- Do we want AI to factor in SEO?
- Do we want AI to have a specific voice/tone?
- Do we want the content to increase awareness, engagement, or purchase?

There are a lot of different factors to consider. By making your user story super specific, you'll have a better chance of success with the other 4Ps.

The next P is people. This might be the most difficult P when we're talking about AI. If you don't have a team with technical skills, introducing AI will be challenging. If you don't have a clear purpose, you don't know what you're hiring for. Additionally, if you're trying to take on too much at once, you could

be hiring for the wrong skill sets.

After people is the third P, process. You need to have a clear purpose and the right people to set up an effective process for your AI. More on this soon.

Which bring us to platform, the P of the hour! AI is a piece of software and at the moment, there is a lot of options to choose from. This is where you go back up to the top of the Ps and make sure that you have a very clear, very specific purpose for using AI. If anything, you choose the platform last, not first. ChatGPT, for example, is a great piece of software, but it may not align with your purpose. You might not have the skills on your team to operate the software. Which means that developing a process around the software will be painful. The point here being, don't choose the platform first. It's the last thing you should be considering.

Last but not least, you have the fifth P, performance - did you solve the problem. If we refer back to the user story, we see that the purpose was to generate more content. If the user story stays general, then sure, a lot of different AI tools can generate more content. You can say that you've solved the problem. However, if you took my advice and created a more specific user story, you'll know exactly what you're measuring and if it had a positive impact on your company or not.

All this to say, if you make smart choices about AI, you can do great things with your team. The way to make those smart choices is to be clear about your purpose. Then evaluate your team's skills. Develop a process for using and measuring AI. Then you pick an AI platform. Lastly, measure your efforts. The goal of AI is to make things easier, not harder.

Are you making smart decisions with AI?

Reply to this email, or [come join the conversation in our Free Slack Group, Analytics for Marketers.](#)

May 31, 2023: Should You Migrate Universal Analytics Data?

Should You Migrate Universal Analytics Data?

Do you hear that? It's the sound of the clock ticking, telling you that time is running out to move from Universal Analytics to Google Analytics 4! As of this post, you have 30 days!

What's that? You already did? Ok, great!

Well, hold on a second. Did you also migrate your many years worth of Universal Analytics out of the system and into a separate database?

Yikes! No one said anything about having to export and migrate Universal Analytics data.

[Google mentions it here.](#)

"In the coming months, we'll provide a future date for when existing Universal Analytics properties will no longer be available. After this future date, you'll no longer be able to see your Universal Analytics reports in the Analytics interface or access your Universal Analytics data via the API."

Basically, Google will only allow you to access your Universal Analytics data for a few months after they switch to GA4. They offer some guidance about exporting your data into a csv or other type of file - but many of us have years worth and multiple properties to consider.

Before we all collectively panic, and you have every right to do so, let's assess the situation.

The first question you need to ask is, "Do I need my Universal Analytics

data?"

You probably said yes. We're all data hoarders. We like to keep our data, "just in case".

But holding onto and storing years and years of data isn't a reality for everyone. Not only do you have to house your data somewhere, but you need to be able to access and read it. None of these things are easy when it comes to data.

To be clear, this post is not about telling you how to migrate Universal Analytics data. We'll be doing that on the livestream. You can tune in every Thursday at 1pm EST at trustinsights.ai/youtube

This post is about helping you determine if it's worth the effort to migrate Universal Analytics data. The process of data migration is not a small undertaking. So before you dedicate resources to this, you should be positive you need the data.

Let's try again. Do you need all that historical data?

A better question is this, "When was the last time you made a decision with your Universal Analytics data?" If it was within the past six months, you probably need at least some of your historical data. If it was within the past few weeks, you definitely need your historical data. However, if you haven't made a decision with your data in the past year and only casually look at it, you might consider letting it go.

I know, blasphemy. But this is a good time for all of us to be honest with ourselves. Google Analytics data can tell you a lot of information but if it doesn't align with your business goals, it might not be worth trying to salvage.

The most straightforward way to approach this question is with a KPI map. You thought I was going to say the 5Ps - tricked you!

A KPI (key performance indicator) map is a hierarchy of data points. At the top of the map are your goals. These are things like revenue, memberships, etc. The next level down are the metrics that tell you if you're on track. These are things like goal completions, sign ups, check out data. You can keep tracing down the line for each KPI. For example, your goal is revenue. You get revenue by sales from your website. Sales happen by cart fills, and cart fills happen when people come to your site and select products. You can see where this is going. A KPI map helps you keep your data focused.

If you know you need your historical Universal Analytics data, start mapping exactly what you need. This will help you narrow down the scope of work to move your data out of one system and into another. Migrating your data takes time, patience, attention to detail and can be costly. Be sure you're taking only what you need and let go of the rest.

Are you migrating your data?

Reply to this email, or [come join the conversation in our Free Slack Group, Analytics for Marketers.](#)

June 7, 2023: Monthly Reports, Part 1

Monthly Reports, Part 1

Monthly Reports. Love them or hate them, they are a necessary evil. Admit it, we all create them. Some better than others.

Raise your hand if you've ever participated in creating a monthly report that was so long and convoluted that you had no idea what it meant to communicate.

Now, raise your hand if you've ever received a monthly report that was so long and convoluted you had no idea how to use it.

I see that most of you have both hands up. Good. Now that we've admitted the problem, we can work together to fix it.

Over the next several weeks, yes, several, I'm going to deep dive into not only what's wrong with monthly reporting, but also give advice on how to fix it. Why weeks? Because we all do monthly reporting, and very few of us do it well. Not because we don't have the ability but because many of us have inherited the reporting structure. Others of us have stakeholders pile additional requests on top of the already cumbersome report. Lots of us are asked for reporting that goes into the void never to be seen again.

My goal for you is this: You'll learn tips and tricks to talk to stakeholders and get to the heart of what they actually need. We'll talk through putting the data together in a way that helps tell a compelling story that is actionable.

Much of this advice is common sense and not earth shattering. However, we tend to get so focused on our own work that it's helpful to have someone else remind us of what's possible. That's what friends are for. And we're all friends here, sharing the highs and lows of reporting.

For the next few weeks we're going to dig deep, and I mean deep - bring a

flashlight, into each of the 5Ps. As a refresher or if you're new here (hi there!) the 5Ps are Purpose, People, Process, Platform, and Performance. Because the 5Ps are dependent on each other, you cannot fix one small thing without creating a larger ripple effect. We need to be clear on how all the pieces work together. Spending a whole post on each P might feel like a lot, but I would welcome you to let me know that you're 100% satisfied with your monthly reporting and don't see a single opportunity for improvement.

So let's start at the top with Purpose.

This is the anchor, the foundation, the reason for your monthly reports. If you don't have a solid purpose for your reporting, it's pointless. Your time is being wasted creating something that won't lead to decisions. In any situation, monthly reports, hiring team members, introducing new technology, you name it - you need a defined purpose. This is non-negotiable. Why? A purpose tells your people why you're doing something. It helps give them a sense of ownership over their part. It helps them understand the bigger picture and feel like a part of the team. A purpose dictates the process and the platform. You need to know why before you can decide on what. And finally, a purpose tells you the performance. If you don't know what you're supposed to measure, how do you know if you were successful?

Where many of us go wrong is by asking the wrong questions. Usually, it's something akin to "what do you want to know?" or "what data do you want to see?" Those are good starting points but you won't get the full story with those answers. Instead of asking a question, state the facts. How? A user story.

A user story is a simple sentence that tells you everything you need to know.

Here's the structure: "As a [persona], I [want to], so [that]."

The "persona" tells you the stakeholder. The "want to" informs the process and platform. The "that" is your purpose and performance. Everything you put into your monthly report, from the data points, to how it's collected,

should map back to your user story.

Take a moment and look at one of your monthly reports. Have you been generating it month over month for so many years that you no longer know why you created it or who even looks at it? This is a great opportunity to map a user story to your report. If you can't, it might be time to re-evaluate your needs and the contents of the report.

Now that you're questioning everything, let's start to fix it. Start with your key stakeholder. Who gets the report? Are you the key stakeholder? Even better.

Start with a user story. Give your stakeholder something to react to instead of asking them what they want. Let's pretend for a second that I'm generating the report for you. I would present you with a user story like this:

"As a marketing manager, I want to measure my content marketing, so that I know where to allocate budget."

What I'm doing is giving you something that either resonates with you or doesn't. You might say, "That's ludicrous, we do paid ads!" Great. Now we're getting somewhere. When you ask me for data about content marketing I can remind you that you wanted to see data about paid ads. You're starting to focus in on the purpose of your monthly reports.

Repeat this exercise. You might need to go through a few user stories until you get it right. The more specific you are, the better your reporting will be.

The other thing to note about user stories is that it doesn't have to be one statement to tell every story. Just like you have multiple reports, you can have multiple user stories. Paste the user story at the top of each report as a gut check. If your data doesn't map back to the story, either your purpose is wrong, or the data doesn't support it.

Next week, we'll dive into all the people that have opinions about your reports. Until then, I want you to write a few user stories for your reporting.

Write them down. Put them away. Then take them out a few days later. Do they make sense? Could you build a report from them? Keep at it. It takes practice.

Do you have a love/hate relationship with your monthly reports? Reply to this email, or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

June 14, 2023: Monthly Reports, Part 2: People

Monthly Reports, Part 2: People

Last time, we talked about the purpose of monthly reports. If a week later you're still scratching your head, wondering, "what's the purpose?" - perhaps the next few entries will help shine the much needed light you need.

Once you know the purpose you can piece together the rest of your plan.

In the previous example, this was my user story: "As a marketing manager, I want to measure my content marketing, so that I know where to allocate budget."

The first part of the statement is the person, the marketing manager. The second part of the statement is the process and platform. Every decision you make will tie back to measuring content marketing. The third part of the statement is your purpose and performance. You need to allocate budget.

This week, let's focus on the people. To that, people, process, and platform are intertwined so you'll get pieces of process and platform as well. I'll dive deeper into process and platform in the next post. Think about it this way: You can have people and no process. You can have people and no platform. But you cannot have process and platform with no people. Confused? I've got your back.

The initial user story is from one perspective. This is a great start but to have robust and useful monthly reports, you want to have multiple perspectives. Even if you are delivering your report to a single stakeholder, the chances of other people viewing the data and asking questions are high. Conversely, your single stakeholder may be wearing many hats and not realize they should be looking at the data from various perspectives.

Back to the user story: "As a marketing manager, I want to measure my content marketing, so that I know where to allocate budget."

This is a good start for a user story, but it's not detailed enough. You'll want to go back to your stakeholder to understand what "measure content marketing" means. Getting user stories from other team members can help fill in those gaps.

If your purpose is to measure your content marketing, for example, use that as an opening. Talk to your writers, your editors, and your analysts. Have them construct user stories as it relates to content marketing. What do they care about. I'll wager a guess that they care about metrics that are different from what your stakeholder cares about.

Here are some examples of what you might get back:

- "As the content writer, I want to know what topics our customers care about, so that I can write valuable content."
- "As the content editor, I want to publish clear and succinct content, so that bounce rate is low."
- "As the analyst, I want to measure page views, so that I know what content resonates with our audience."

As expected, everyone cares about a different part of the content marketing process. So, what does that mean for you, the person putting the monthly report together? Do you have to create a different report for each person? Possibly.

Knowing what your people want will help you establish your processes and choose your platforms. If we go back to the user stories, your content writer wants to know what topics your customers care about. This start to tell you that your platforms are SEO tools and Google Search Console, for example. You might establish that your process includes daily or weekly data exports to see how things change. Your process may also include matching keyword data to existing content to see if there are opportunities to repurpose or refresh.

Your content editor and analyst are looking for data that comes from Google Analytics. Now your monthly report is starting to take shape. We're still missing some data though. The end user, the customer. When we think about people, we focus a lot on the internal team, which is important, but not the whole story. If you're struggling to create monthly reports that stakeholders can make decisions with, try positioning the data as if you were sharing it with your customers.

- "As a customer, I want to consume content that demonstrates authority, so that I know which company to hire"
- "As a customer, I want to consume content that answers an immediate question, so that I know this company can help me"

I would always recommend creating a handful of user stories from the perspective of your customer. You can start to back into your metrics to show that you're meeting the needs of your customers. At the end of the day, your customers should be the priority. When in doubt, go back to what they have said they wanted, and put those metrics together.

Next time, we'll dive into process and platform as they relate to the information from the user stories, and pitfalls to avoid.

Are you creating user stories from the perspective of your customers? Reply to this email, or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

June 21, 2023: Monthly Reports, Part 3: Process and Platform

Monthly Reports, Part 3: Process and Platform

If you're following along, we're talking about creating better monthly reports using the 5P framework. The previous two posts covered Purpose and People. This time, we want to dig into Process and Platform.

As a refresher, we started with Purpose where we created this user story:

- *"As a marketing manager, I want to measure my content marketing, so that I know where to allocate budget."*

We then drilled down into the People we created more user stories:

- *"As the content writer, I want to know what topics our customers care about, so that I can write valuable content."*
- *"As the content editor, I want to publish clear and succinct content, so that bounce rate is low."*
- *"As the analyst, I want to measure page views, so that I know what content resonates with our audience."*
- *"As a customer, I want to consume content that demonstrates authority, so that I know which company to hire"*
- *"As a customer, I want to consume content that answers an immediate question, so that I know this company can help me"*

Now we're ready to start outlining the Process and choosing Platforms. I'll let you in on a really terrible secret. Many companies choose their platforms first and then try to back into their user stories. This is the wrong way to go about measurement. That said, sometimes you inherit or are stuck with a platform you didn't choose. We can talk through that as well.

Back to the user stories - what we're seeing as that everyone has a different

need. This is your opportunity to develop a repeatable process for your monthly reports that allows you to extract and analyze the data requested. This is also where you start to select your platforms. In this instance, you'll be working with a few different platforms.

When developing your process, ideally you'd be thinking about as much automation as possible. This could and should influence your platform selection. Let's say you need to extract data on a weekly basis for your monthly report. You'd want a platform that allows for scheduled data exports, or even connection to an API that will allow for automated data extraction into your sheets or database.

I've seen time and time again, teams spending A LOT of time on monthly reports because of how manual the process is. Perhaps you don't have the resources to automate the whole process, but I'd bet you could automate at least some of it.

For example, if you're not using a platform like Looker Studio, you're missing out. Especially if the data you're using to power your reports comes from Google Analytics and Search Console. When we go back to the user stories, we can see that the data, in fact, does come from those sources.

- *"I want to measure pageviews"* - that is a metric you can find in Google Analytics
- *"I want to know what topics our customers care about"* - that is data you can get from Google Search Console and Google Analytics
- *"I want to consume content that answers an immediate question"* - that is data you can get from Google Search Console and Google Analytics.

What I would do with this information is open a blank Looker Studio book and start connecting my data sources. Then I can build out the tables and charts that answer the questions asked in the user stories. Now, you've automated the process of pulling the data, and the platforms are Looker Studio, Google Analytics, and Search Console.

That's not nearly as painful as you thought, right? Once the reports is set up, part of your process should be to monitor the data to make sure there are no

anomalies and the at the connections between platforms don't break.

If you're in a situation where all your tools don't play as nicely together as the example above - don't fret! Your best bet will be to establish a repeatable process to extract, clean, and analyze the data. This will allow you to scale and eventually automate your process. You make find new platforms down the line that can do this for you, but you need to have the process nailed down first.

In the next edition, we'll tie it all together with Performance.

Are you creating repeatable processes? Reply to this email, or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

June 28, 2023: Monthly Reports, Part 4: Performance

Monthly Reports, Part 4: Performance

Wow, you've stuck with me this long, I'm so glad to see you back again! This is where we put all the pieces of the puzzle together.

As a quick recap, we walking through how to create more robust monthly reports using the 5P framework. We've covered Purpose, People, Process, and Platform. The fifth P is Performance.

To refresh your memory, we created these user stories:

- *"As a marketing manager, I want to measure my content marketing, so that I know where to allocate budget."*
- *"As the content writer, I want to know what topics our customers care about, so that I can write valuable content."*
- *"As the content editor, I want to publish clear and succinct content, so that bounce rate is low."*
- *"As the analyst, I want to measure page views, so that I know what content resonates with our audience."*
- *"As a customer, I want to consume content that demonstrates authority, so that I know which company to hire"*
- *"As a customer, I want to consume content that answers an immediate question, so that I know this company can help me"*

Then we developed a process to automate data extraction into Looker Studio using metrics from the Google Analytics and Google Search Console platforms.

The last P to consider is Performance. Believe it or not, this doesn't refer to the metrics in your report. Your performance, or measure of success in this

case, is whether you answered the question stated in your Purpose.

In this case, the purpose is budget allocation. Take a look at the examples above and tell me if you think the stakeholder can make a financial decision. I'm going to go ahead and say that we have more work to do.

We got ahead of ourselves and skipped over the initial purpose when developing the processes. Here's the good news, you can go back to any of the previous pieces and add what's missing. In this case, we want to pull some of the attribution data provided in Google Analytics so we can see what channel are performing. We first need to know where our content is being published. This could be on our blog, in our email newsletter, or as a post on social media. To make sure you're really clear, I'd recommend creating more user stories.

"As a content marketing manager, I want to publish content in our email newsletter, so that we can retain our subscribers"

Great! Now we know that email is a channel we need to pay attention to. As we're refining our analysis process, we can include that as a metric. This should tell the marketing manager whether email is working and if we should continue to create content for that channel. That allows them to make budget decisions about current and future resources.

Repeat this process over and over until you have the right user stories, the right processes, and the right platforms to address your purpose. That is how determine your performance.

The only thing left to do is get started! Reply to this email and tell me about your journey or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

July 5, 2023: Using Predictive Forecasting to Not Send Email

Using Predictive Forecasting to Not Send Email

Did you know that in the United States, the week of July 4th is the worst week of the year to send email?

We know this because we look at the data. I know, you're shocked right now.

But not only historical data, like email opens. We can't change that. We use predictive forecasting to make decisions about what is likely to happen.

[You can learn more about our predictive forecasting services here.](#)

If you want a practical example, [you can see what the cheese of the week is.](#)

Because this is a slow week and we already know our email KPIs are going to take a hit - I'll keep it short and sweet.

So, where is everyone? Likely on vacation. A lot of companies close down for the entire week, giving their employees a break. In the United States, we are deep into grilling and BBQ season.

I asked our free Slack community, [Analytics for Marketers](#), what their favorite grilled dish is. Here's what they had to say:

Sandy: *"Take tough piece of meat and marinate it in Coca-Cola plus your favorite spices."*

Hannah: *"Recommendation: come to Brazil for the best bbq"*

Leslie: *"I've been ignoring my regular grill for my Blackstone griddle lately - we've*

been making a ton of stuff: fried rice, cheese steaks, etc"

Chris: "My favorite thing to sort-of grill is a nice sous vide steak. 1.5 inch/4cm thick steak in a sous vide with salt, pepper, and garlic for 8 hours at 133F/56C, then pat dry, baste with garlic and butter, and toss on the grill for 30 seconds each side at the highest possible heat for a very fast sear."

Tona: "I like watermelon feta salad this so much I had the caterer make it for my wedding!"

Lisa: "We marinate our chicken in orange juice"

What is your favorite summer grill dish? Reply to this email and tell me about your journey or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

July 12, 2023: AI Efficiencies Ripple Effects

AI Efficiencies Ripple Effects

AI is great! AI is terrible! AI will take my job! AI will make my job easier! Love it or hate it, AI (artificial intelligence) isn't going anywhere. Some of you may have concerns about your job security because of AI.

If you've introduced AI into your business processes, you may have started to see the efficiencies and cost savings. But what about the rest of your business?

It's the butterfly effect. One flap of a butterfly's wing could set in motion a greater series of events, like a typhoon.

Introducing AI might not cause something catastrophic like a typhoon, but there will be a ripple effect on different parts of your company.

Let's say you started using ChatGPT to write content. You decide that the content is good enough so you stop renewing your writer's contracts. In the short term you've saved some money and made the process more efficient.

Now, let's look longer term. You've made one part of your process more efficient using AI, so where is the ripple effect. You have to look backwards and forwards in your process. Start at the beginning of your content creation process. How do you select topics? Who creates your editorial calendar? How does the keyword research get done? Then think about what happens after AI creates the content. Who edits the content? How does it get disseminated? Who keeps the content updated? What metrics do you need to track?

You could argue that AI could handle some of this, or that creating more content wouldn't have a ripple effect on the other parts of the creation process. What if the stakeholders decide to increase the volume of content

because AI can do it so quickly? Now you're looking at doubling or tripling the workload for the other people involved in the process.

We can start to look at the process beyond content creation and see what the effect is there too. If you're generating 2x, 5x, or even 10x the amount of content you were before, chances are you're getting more views, more visits to your website, more engagement. What's the ripple effect there? Possibly more load to your website, more inquiries from potential customers, more time spent qualifying leads, more sales.

That all sounds fantastic! Sure, but you still need people handling those tasks. Are they equipped to take on more? Let's say your AI efficiencies generate more sales, more contract, more clients. Now you have to staff up. You need Account Managers, Analysts, Marketers. You need a more robust project management system. All these things come at a cost and a learning curve.

The point is not to scare you away from using AI in your process to make it more efficient. The point is that you need to look at the bigger picture when optimizing one small part of your process. When Henry Ford started incorporating the conveyor belt into his car manufacturing line it changed everything. He needed to produce more materials to build cars. He needed to hire more people to manufacture the vehicles. He needed to bring on more staff to manage the equipment and sell the cars. One change to the process have have far spreading effect on your overall business.

My advice is to audit your immediate process that you want to optimize and then start to take a look at what else that process touches. Where are the weaker spots in your business that you have to pay attention to if things ramp up? For us, it's bandwidth. We will need to hire very quickly when our AI processes start generating even more business. It's a good problem to have, but one that I want to have a plan for.

Are you using AI to make your processes more efficient? Reply to this email and tell me about your journey or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

July 19, 2023: What We Get Wrong About Innovation

What We Get Wrong About Innovation

"Never have a good conversation behind closed doors."

Last week, someone on LinkedIn quoted me as posting, "Never have a good conversation behind closed doors." This post is now 7 years old, but the comment stuck with her. [You can read her full post here.](#)

If I got back in time to where I was 7 years ago, my guess is that I felt frustrated by leadership team. They would have closed door meetings to try and solve problems that they were out of touch with. Come to think of it, this is a very common issue at a lot of companies. Good ideas can only come from the top, right?

I used to work at a company that was very strict on hierarchies and would often tell me that certain conversations were, "above my pay grade". While certain conversations were, indeed, above my pay grade, solving customer issues was not. This same company would then hand down half baked solutions with no supporting data and ask my team to execute on it with no further conversation. Forget the fact that my team and I were closest to the customer, but the leadership team didn't want our input. Needless to say, the solutions often flopped and leadership would be furious about the time and money that was being wasted. Then the cycle would start all over again.

This is why I said what I said. Everyone, and I mean everyone, at any given company has thoughts, feedback, and ideas. Some of the ideas need more exploration, some of the ideas might not see the light of day, and some of the ideas are exactly what's needed.

What we're really talking about is getting to true innovation. Innovation is taking a product, a service, or an idea, and breathing new and refreshed life

into it. It's putting a new spin on an old thing. And this is where my statement comes into play. If leadership is so confident that only the executive team has innovative ideas, they are already failing.

There are a few different pieces needed to have true innovation in a company. Innovation needs collaboration, communication, cooperation, participation, and ideation.

Please don't groan at me for rhyming. I thought it was pretty clever.

Ok, back to the point...

Before you can get to innovation, you need more than only you. You need collaboration. To get to collaboration, you need communication. To get to communication you need cooperation. To get to cooperation you need participation. To get to participation you need ideation.

Here's how it works. Someone in your company, regardless of role, has an idea that they want to explore. They start talking to their team and their manager. The team and the manager agree to participate in this ideation. The manager takes the idea to leadership and they also agree to participate in this ideation. Now we're cooperating as a company. With this cooperation, we see that the original idea is being communicated around and different people from around the company are collaborating. This has now gone from one single person's thought into true ideation with the goal of collaborating on an innovative solution.

That's overcomplicated, isn't it? But I really, really liked my rhyming.

The point is that you should never have a good conversation behind closed doors. Why? Because you can't truly innovate alone. You need the voices and input of others to make your idea the best it can be. Shake off the constraints of a corporate hierarchy. A good idea is a good idea, regardless of the source.

To that, it's not enough to take the ideas from across the company. You need to let people participate and collaborate in the communication. You need to

cooperate with the staff and dig into the conversations.

If you're part of a leadership team that doesn't take input from the rest of the company and only has "good" conversations behind closed doors, I challenge you to change that. Not all at one, change takes time. But maybe once a quarter you bring in your directors or managers to have a more collaborative conversation about what's going on. Maybe once a quarter bring in your customer support team to hear directly from them what customers are saying. But don't think that for one second you can innovate in a vacuum.

Are you gathering ideas from across your company? Reply to this email to tell me about it, or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

July 26, 2023: How to Get Your Agency Ready for AI

How to Get Your Agency Ready for AI

A few weeks ago I got to sit down and talk with my good friend, Brooke Sellas for her podcast, "The Marketing Agency Show". In case you missed it, you can watch the episode here: <https://www.youtube.com/watch?v=gmvJDiPuP18>

In the episode, we talked about how to get your agency ready for AI. This is the burning question everyone has right now, isn't it? That, and, "What tool should I use?"

What I told Brooke is that starting with AI, starting with the platform is the wrong way to approach it. You need to start at the top with your purpose - the question you want to answer.

Oh snap - it's a 5P post.

Yes, it IS a 5P post. Because if you've been reading this newsletter for a while, you know that the 5P framework is incredibly versatile. You can even assess your AI readiness.

Ok, let's go!

As a refresher, the 5Ps are Purpose, People, Process, Platform, and Performance.

When Brooke and I talked, I highlighted the fact that where a lot of us go wrong is that we choose the platform first. Then we try to retrofit the technology into our existing processes and ask too much of our people. We've lost sight of the purpose and have shaky performance metrics.

So let's fix that, shall we?

Purpose

Better known as, "What is the problem you're trying to solve?" Let's be clear about this. You're not asking, "What is the problem I am trying to solve with AI?" No. If you ask that question, you're getting it wrong. Take AI out of the Purpose. It starts you off on the wrong foot and assumes that AI is the answer. It might not be.

As you define your purpose, you should use user stories. A user story is a simple statement with three parts:

As a [persona], I [want to], so [that].

Here's an example: As a CMO, I want to use AI, so that our company stays relevant.

That's a terrible user story because it doesn't state a clear problem. Staying relevant isn't a measurable outcome and it will vary depending on who you ask. What is relevant? If this is the problem you're trying to solve, you need to dig deeper.

Let's try again: As a CMO, I want to scale up my content marketing team, so that we can reach a wider audience with more helpful content.

We can work with this. The CMO is the stakeholder. Scaling the content marketing team is the process and platform we're picking apart. Reaching a wider audience is the purpose and what we're looking at for performance. Notice that we haven't talked about AI yet. The assumption might be that a tool like ChatGTP to create more content is the solution, but we don't know that yet. Let's keep going.

People and Process

The problem you're solving is that the CMO wants to scale up the content marketing team. Truthfully, that's still a little vague. To get more specific, we

want to evaluate people and process together. We need to get a better understanding of where the process isn't working for the content marketing team. Additionally, where are the optimization opportunities? Start with having a conversation with your content marketing team and asking them what they need, instead of assuming that AI will solve their problems. The problem might be communication from the stakeholders about the purpose of the content or who the audience is. These are not problems in the process that AI can solve. This is a communication breakdown that you solve with a stronger content brief and better expectation setting. Interesting, but still no mention of AI.

Platform

As we start to understand more about how the content marketing team could scale, we want to look at the platforms you're using. How are you doing your customer research, your keyword and topic research, and your content dissemination? This might be where you can incorporate AI into your content marketing team. However, as we're digging into the purpose, people, and process we're not seeing a strong case for bringing in AI yet. You could use a platform like ChatGPT to assist with editing the content, but that hasn't presented itself as the core purpose. If you feel strongly about using AI, set up some A/B tests to get a better understanding of the value of AI in your process. Is it making your content stronger? Is it shaving time off the overall process? Are the people feeling supported or are they even more frustrated by having to use AI? If you're starting down this road, I would restate the purpose.

As a CMO, I want to do A/B testing with AI tools, so that I can see if it makes my content marketing process more efficient.

By restating the purpose, you'll have different perspectives on people, process, and performance. You're measuring the effectiveness of AI, versus the reach of your content.

Performance

This is the other P that companies get wrong when they are trying to figure out where AI fits into their company. If we look at the other 4 Ps we've

evaluated, we want to measure the reach of our content. How does that translate into metrics? You need to define what "reach" means for your company. Does reach mean more followers on social? More newsletter subscribers? More traffic to your website? Those are your performance metrics.

Otherwise, you might not be clear on your original purpose. In that case, go back to the top and revise your user story to be more specific.

As we're wrapping up this particular example, I want to point out that AI was not the solution. That doesn't mean that AI shouldn't be used in your business. The point here is that if you're starting with AI as the solution but you aren't clear on the problem you're not going to have a lot of success. Going through the 5P framework can save you a lot of money and headaches. You'll have your blueprint for how to move forward and a built-in measurement plan.

Lastly, I have big news! I'll be talking about this in more depth at Social Media Marketing World in San Diego next February - see you there?

How are you evaluating your AI needs? Reply to this email to tell me about it, or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

August 2, 2023: AI-driven versus Artisanal

AI-driven versus Artisanal

30% of jobs, 80% of jobs, 100% of jobs. AI will take all the jobs. These are the headlines we read every single day. Worry about AI. Your job is not safe.

"A person skilled at AI is more productive than a person who is not" - Chris Penn

"By 2030, activities that account for up to 30 percent of hours currently worked across the US economy could be automated—a trend accelerated by generative AI." [McKinsey & Company](#)

We're all scared to lose our job to AI soon, right? AI is going to make processes more efficient. AI is going to take repetitive tasks. AI is going to run your life.

I don't know. I have a different perspective on this. I agree that AI is going to do all this, and more. However, I also feel like there will be space for those that choose not to let AI run everything for them.

The best example I can give is Amazon versus Etsy. Amazon, in this example, is the AI-driven store where processes are efficient, prices are low, and they deliver goods within hours. Etsy is the artisan shop where prices are higher, goods are hand-made, and delivery happens with the item is ready. I'm aware that Amazon has a small business, curated good section, and that some Etsy shops operate like Amazon. But for the sake of this post, let's pretend we don't know those things.

Let's explore the pros and cons of AI-driven versus Artisanal. Also, if anyone can suggest a better word than artisanal, I'm all ears.

Creation

In this example, goods are mass produced by Amazon and hand-made to order on Etsy. If you think about the marketing you do there are going to be cases where mass produced things are good. There are also going to be cases where you want something hand-made. If you are running ads and trying to test a lot of variations and adjust bids and targets, AI is good choice. However, if you're developing a piece of thought leadership content meant to demonstrate your authority and brand voice, using AI is not the right choice. You will want something hand-made, or "artisanal".

Cost

There is no doubt that over time, AI can save money due to the efficiencies. If you buy something from Amazon, you can find goods that are low in cost and delivered for free. If you're purchasing from Etsy, you're likely to pay higher and foot the bill for shipping. This is a tough one - as the saying goes - you get what you pay for. Maybe you need a high volume of things created for your marketing and you have budget constraints. On the other hand, maybe you need only one or two pieces that are specifically tailored to one audience. In that sense, spending more money of the customization could be worth it.

Customer Service

When it comes to customer service, you will find people that only want to deal with chatbots and people that only want to deal with other people. When you reach out to Amazon, you're not getting a person. You're getting an automated system first. With Etsy, you're reaching out directly to the shop owner who will talk to you and answer your questions.

Convenience

Sometimes, you need it now. You need it yesterday. In that case, AI is a good option. Amazon can deliver to you within a few hours, sometimes faster. If time is not an issue, something hand-made that takes longer can work.

Here's the point - I can imagine a world where both options have space in our industry. There are companies that will want to cut costs, make processes more efficient, and offer convenience. There are also companies that will opt

out of being AI-driven. They will continue to hand-craft and customize their products and services. Both can exist. Both examples are valid.

When I think about "will AI take my job?" - the answer is at some companies, yes. But at some companies there will be a place for you to do things by hand. You have to make the choice which direction you want to go and what customers you want to serve.

Are you worried about AI taking your job? Reply to this email to tell me about it, or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

August 9, 2023: Are Your Marketing Tactics Out of Date?

Are Your Marketing Tactics Out of Date?

Trying to keep up with all the changes in technology is daunting, am I right? I know that at least some of you feel this way right now because we've talked. You've shared your concerns. You've acknowledged that you feel like you're falling behind.

I cannot speak to all your fears, but I can share with you what helps me when things get overwhelming. Go back to what you know best. For me, it's the 5P Framework. That probably comes as no surprise to you. It's not just the 5Ps but what I can do with it. I start to bend and stretch it, see what else I can do with it. I know what the 5Ps are, what they can do backwards and forwards. So how do I use what I know to keep moving forward?

I'd be a fool if I didn't think that AI wouldn't touch my company, my reporting, my services. Yes, we've built our company processes on machine learning but the outputs have remained fairly consistent. We knew that the methods for analyzing digital channel data would change, but the data itself, the channels themselves, were reliable.

Then AI came along. No, it's not new technology, but the implementations of it are finally picking up speed and becoming mainstream in the marketing industry. Search, Social, Paid, Email, you name it, AI is changing it. So how we do assess if our marketing tactics are out of date?

Let's start by running them through the 5P framework and see where we land. Why? Because we all want to hit the panic button right now. We all want to shift budgets, cut corners, and get ahead of the pack. None of these things can happen without a plan and we need to slow our breathing. So let's make a plan, shall we?

As a refresher, the 5Ps are: Purpose, People, Process, Platform, and Performance. Each P is reliant on the others to create a full story. For this exercise, we'll take a look at our Competitive Analysis report. We designed the report to show you where your strengths, weaknesses, opportunities, and threats are with your digital marketing. [You can read more about it here.](#)

How does the report look if we run it through the framework?

Purpose: The purpose of the report is to understand the digital footprint of your company compared to your competitors.

People: The people that care about this report are you, and any other decision makers.

Process: The process to generate this report is manual. There is a spreadsheet with formulas that someone needs to fill in to generate the report. Now my wheels are turning...let's keep going.

Platform: The platforms used are numerous. There are a lot of systems needed to extract data. This is likely where you would start the audit. More on that in a second.

Performance: The performance of the report is whether you, the decision maker, has enough information to start making decisions about your tactics.

The 5P Framework told me a lot. I can see the process of generating the report is manual. Perhaps I could look into introducing some automation. But I'm getting ahead of myself. We want to pick apart the platforms that provide the data before automating the data collection.

When I look at the platforms used to create this report, I can see that we need to update them, especially around Search and Social. My next tasks is to figure out what data to remove, and what to replace it with to keep the competitive analysis valuable.

Once I have the platforms updated, then I can look into the process

opportunities. From there, I will run the report back through the 5P Framework and see if it still aligns with the purpose.

The point is that when the industry is changing rapidly and things feel like they are spiraling, focus on what you can control. We'll be digging into the competitive analysis report deeper on the Livestream this week. [Join us on Thursday at 1pm EST](#)

Are you taking a step back and auditing your marketing tactics? Reply to this email to tell me about it, or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

August 16, 2023: Be Your Authentic Self

Be Your Authentic Self

I'm a jeans and T-shirt kind of girl. Technically, I'm more of a yoga pants and t-shirt kind of girl. And a hoodie. I'm making this admission because I have a few events over the next few months and I need to find clothing more appropriate than yoga pants.

I'm starting this week's post with this because I got some really insightful styling advice from a surprising place - my husband. I'm not saying he doesn't understand fashion but that it's not high on his list of priorities. He does, however, know me well and cares greatly about how I feel about myself. He said, "Don't force yourself to play a part that isn't you. Be yourself and be comfortable." We went on to talk about people whose style I would like to emulate, and none of them were what I "thought" I should look like. It was really eye-opening.

This brings me to the point of today's post: comparisons. Last week, I talked about using the 5Ps to audit our competitive analysis report. This week I want to spend a little time on the findings of such a report.

When we aren't sure what to do, when we feel lost or overwhelmed, we look and see what everyone else is doing. We tell ourselves, "I'll just do this until I figure something else out"...but that day doesn't come. We get stuck doing things that don't really work for us but it's better than doing nothing.

A competitive analysis tells you what's working for other brands and how you stack up. The problem with this approach is that we look to our peers and think, "That's what I need to do." Looking at your competitors is a good starting place. It can help you understand what's resonating with similar audiences. However, this is where you need to be your authentic self. What's working for your competitor might not work for you. Why? Because they

aren't you.

Before you can do comparisons you need to clearly define what your company does and how you do it differently. You need to be able to tell your audience why your services and products are better than anyone else's. This is the part that a lot of us struggle with. We know we're different, better, more valuable. But we struggle to articulate it. We struggle to pinpoint exactly who we serve and what their pain points are.

This is where your competitive analysis actually starts. Tools like ChatGPT and Llama-2 can help. Give these tools your website copy, your blog posts, and your newsletters, and ask them to do an analysis. Here's an example prompt:

"You are a business development expert. You understand customer pain points, value propositions, and competitive advantages. Your customer is a mid-level B2B marketer with moderate analytics skills. Examine the attached content from the services pages of this corporate site and provide your analysis of its clarity of services and value to the customers. Make recommendations to improve unique differentiators and how this company solves customer issues."

Once you have a better sense of how well you communicate your business, you can move forward with analyzing your competitors. You can use the same prompt as above and then take it a step further with something like this:

"You are an expert web designer and UI/UX expert. You know user experience, user interface design, user-friendliness, web page design, and website design. Examine the attached screenshot of a corporate homepage and provide your analysis of its UI/UX experience, then make recommendations to increase both retention and conversion."

As mentioned, we often think that modeling ourselves after our peers will make us successful. It's good to get inspiration, but you need to dig deep into what's working for them and where they have vulnerabilities. Before you start overhauling your services pages to look like your competitors, make

sure it's the right move for you.

At the end of the day, you need to be your authentic self. Talk about your company with your voice, not your competitors. Approach your customers in a way that makes sense for you, not your peers.

Are you using AI to understand your competition? Reply to this email to tell me about it, or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

August 23, 2023: AI Is a Culture Shift

AI Is a Culture Shift

Are you tired of hearing about AI? Unfortunately, it's not going anywhere. If anything, it's going to become so mainstream you won't even notice it anymore. Until you do. Until your leadership decided that your company is going to be "AI first". Until your boss tells you that you have all new tools that have AI in them that you need to use. Until you start to lose sleep, worried that AI is going to take your job.

I'm not here to create additional anxiety. What I want to do is help you recognize the pitfalls of introducing AI and how to think about preventing them.

Here's the short version: AI is a culture shift. If your culture is shaky or non-existent, AI won't fix it. If your culture is people-first and your leadership wants to start leading with AI, this will fail. AI won't fix people problems.

A million bazillion years ago when I worked as a product manager, the company I was at was undergoing a lot of changes. The business model was shifting from clinical research to commercial products. The organization was changing from a top-down approach to a more flexible approach called a matrix structure. (I should make a separate post about that.) The tech stack was moving from CD-Rom to dot com. New disciplines were being tested, new managers were being promoted, new technology was being embraced. It was a lot all at once.

Because there was a lot of change, the organization brought in an outside consultant. The consultant talked with "key" employees and leadership about creating a strategic plan. This plan, broken down into sever BHAGs (Big Hairy Audacious Goals), was then rolled out to the entire company. Each goal had an owner from the leadership team and milestones to hit.

So far, so good, right? Nope. It all looked good on paper, but it didn't work. It

failed spectacularly. Not because the employees weren't on board (we were) but because there was no follow-through from leadership. They lacked transparency. They stopped updating the employees on the progress. They stopped engaging in the initiatives. They stopped prioritizing the new goals as valuable time spent. The leadership team closed the doors on their "high-level" conversations and locked the rest of the company out. They patted themselves on the back for creating a strategic plan, telling us about it, and giving us instructions to execute it. There were graphics created for this thing. There was a company-wide meeting. There were snacks. And then...crickets.

What went wrong? Well, aside from everything, it wasn't a true culture shift. Culture is set from the top down. It's not enough for leadership to go through the motions of what they want the rest of us to do. Leadership needs to consistently participate.

Enter into the chat: AI. I've lost count of the leadership teams that have asked us to help them implement AI into their company. I've also lost count of the times that I've advised them to get aligned with each other on why they want to introduce AI. That's usually where the conversation stops. If your leadership team is not crystal clear on why they want to change the culture with the introduction of new tech, it won't work.

Think back a few years to the buzzword of the hour, "digital transformation". Simply put, digital transformation meant wanting everyone to be digital first and use a bunch of digital platforms that don't communicate. Where digital transformation got it wrong, and still gets it wrong, is the people. This was the inspiration for the 5P Framework.

Ah, we almost got through a whole post without a mention of the 5P Framework. I'm not going to go through all the pieces (Purpose, People, Process, Platform, Performance). I want to bring it up because by far, the most important "P" is people. And that is the P that is often given the least amount of time and thought.

Back to the point. In this context, AI is just a new piece of technology. It's another platform. It's an updated process. However, if you don't have

alignment and participation from the top down, the shiny new object will be just that. It will be a distraction. We will forget to use it. The tool will become just another invoice to pay.

If you're wondering if the company I worked at a bazillion years ago is still around, it's not. The leadership team became divided and eventually dissolved. The company sold , changed hands again, and then one more time. It's a shame, because the BHAGs that we had set could have grown into big things. Ah well, lesson learned.

Are you undergoing a culture shift? Reply to this email to tell me about it, or [come join the conversation in our Free Slack Group, Analytics for Marketers.](#)

August 30, 2023: Innovation Starts With a Good Foundation

Innovation Starts With a Good Foundation

When I worked at the other company a million years ago, the leadership team relied on the staff to help come up with new ideas. They formed an "innovation committee." The purpose of the committee was to generate new ideas for our research scientists and product owners.

If this sounds familiar, it should be - [I wrote about innovation a few weeks ago.](#)

What I didn't talk about is the foundation of innovation. If you regularly read this newsletter or talk to me for 10 minutes, you know I always fall back on the 5P Framework. Today I'm putting together talks for some upcoming events and outlining guest articles. In each piece of content, the foundation is the 5P Framework.

As a reminder, the 5Ps are Purpose, People, Process, Platform, and Performance.

When I write about the 5P Framework, I start to worry that I'm a one-trick pony. I wonder if I have nothing original to say. I become concerned that my perspective is flat and unhelpful.

And then I recall sitting in on that innovation committee, week after week, without generating any innovative ideas. The problem was that leadership thought that innovation meant something net new. Many times, the group would suggest a twist on an existing problem. Leadership would shoot it down because it wasn't "innovative". To them, if it was a riff on something that we already know of, it wasn't innovative. Because of that thinking, we'd spend (waste) our time trying to come up with new problems to solve. It was

the exact wrong approach to innovation.

When I was in graduate school, we studied IDEO. This company was on the cutting edge of innovative solutions. They would observe regular people doing everyday tasks and find areas where they struggled or could improve their process. What always stuck with me is that they would take known problems and find new solutions. They call it "design thinking". I suggested this research technique to my leadership team and they openly mocked me. Needless to say, their well of ideas dried up pretty quickly after that.

I always go back to the 5P Framework. I've been using this framework to talk through complex topics and to find new solutions to the same old problems. I'm trying to stretch and bend the framework to solve all kinds of problems. It is not just for requirements gathering. The 5P Framework is a communication tool. The framework aims to simplify difficult topics into manageable parts and create a complete solution.

Generative AI is a great example of what's innovative. At its core, generative AI is solving problems that we've struggled with for years. The innovations are the solutions, not that we're finding new problems to solve.

Innovation doesn't have to be big and flashy to be effective. Small, thoughtful changes can have a big impact.

Are you innovating? Reply to this email to tell me about it, or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

September 6, 2023: When a Chat with ChatGPT Goes Sideways

When a Chat with ChatGPT Goes Sideways

My brain is empty. I have no idea what I'm going to write about this week. Literally nothing. Not one single small idea that I could tease out. Nothing. My brain is a void.

So, I turned to the resources I have available, specifically ChatGPT, to see if I could get inspired. Normally I would start off with a prompt following the RACE format. If you're not familiar, RACE stands for Role, Action, Context, Execute.

[You can download our free prompt sheet here, no form to fill out or strings attached.](#)

Instead of crafting a prompt, I thought I would have a chat with ChatGPT. I cannot take credit for this. I had started with a prompt and was getting nowhere. As I was complaining about this in Slack, Chris reminded me that I didn't need a prompt, I could literally have a chat. You know, the "chat" in ChatGPT.

I started by saying that I was stuck on what to write for the newsletter and that I was hoping we could have a brainstorm session. The system responded that it was happy to help and asked me for a little more context. I provided the context to the system.

Then things went sideways. I'm not good at having a casual chat.

Before I knew it, the system was providing solutions I didn't ask for. I thought we were brainstorming. I thought we were just chatting. The system was trying to solve my problem and hurry me on my way.

When I managed software development teams, I also oversaw the transition from development to quality assurance (QA). The QA team was responsible for reading the requirements, following the steps, and testing the software. Their goal was to match how the software performed versus what the requirements described. The software often failed initial testing due to unclear or outdated instructions. This caused friction between development and QA. The QA team felt they were wasting time testing incomplete features. Development felt the code was more important than the requirements. Their standpoint was that the requirements were a guide, and that QA should be able to "figure it out."

This is why I bring up the 5P Framework so often. As a reminder, the 5Ps are Purpose, People, Process, Platform, and Performance. While working with the previous team, the requirements mainly included high-level process details. However, they lacked a clear purpose and any performance metrics.

My interaction with ChatGPT was very similar to the friction between development and QA. My previous role taught me that without clear requirements, you won't achieve good results. You'll waste time, you'll waste resources, and you'll burn out your people. Today, I went in with no requirements. I had no plan other than to get unstuck. But I still got frustrated with the results I got, even though I didn't really know what I was after.

Here's the thing. You can open up a new instance of a generative AI tool and have a conversation with no purpose. There is nothing wrong with that. I went in with a loose purpose and an unrealistic outcome. When ChatGPT started offering solutions I didn't want, I gave up.

These systems aren't perfect. If anything, they are still in their infancy. If you're looking to poke around and just ask questions, you don't need a clear plan. But if you're in a situation like me where you have a looming deadline and people waiting on you to finish your work, you should have a plan. Use the 5Ps. Even if you quickly sketch out some requirements it's better than having no plan at all. And the more precise you need your results, the deeper you'll want to document the requirements.

I'd started with a prompt, pivoted to a chat, and then gave up all together. My lesson here is to be clear on my expectations before I get frustrated. I should have refined my original prompt to be more clear. My goal was to get some topic ideas for the newsletter. Instead of rejecting the results due to my vague question, I should have taken my own advice and worked through the 5P Framework. Shame on me for wasting my own time.

Are you experimenting with generative AI? Reply to this email to tell me about it, or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

September 13, 2023: What Do CEOs Need to Do About Generative AI Employee Concerns?

What Do CEOs Need to Do About Generative AI Employee Concerns?

You've read plenty of articles about what C-Suite needs to know. And you've heard the concerns from employees about generative AI. But have the two conversations converged?

CEOs and other C-Suite positions are buzzing about the possibilities of generative AI. Employees are losing sleep over wondering how they will stay skilled up on AI and keep their jobs.

There is a disconnect from what the C-Suite is doing and how they are communicating (or not) with the the rest of the company.

What do CEOs need to do about employee concerns?

Transparent Communication:

This is the first order of business. Too often, leadership teams have closed doors and closed lips about what's going on. Employees pick up on that, despite how well leadership thinks they are playing it cool. Be open about AI intentions for the company, implementations, and implications. Be up front with them. If you don't know what it means for the company yet, say so. That will go a long way to building trust rather than waiting until you figure it out.

Education and Training:

If you, the leader of your organization, decide that generative AI is the direction, you need to help your employees get up to speed. Offer training sessions to help employees understand AI and how they'll use it. Empower

them to work with, rather than against, these systems. [Bring in outside trainers and experts](#) to help your employees with their professional development. Have a clear idea of what you want them to do with generative AI so that you can focus the training sessions.

Reassure Job Security:

As the new, or old, saying goes - AI won't replace jobs. People who know how to use AI will replace the roles of those who don't. This goes back to the first point, transparency. When you're introducing high profile tech like AI, you need more frequent and consistent reassurance. AI is getting more sophisticated by the day and the fear over job security continues to heighten. Without knowing what's going to happen, employees will start to leave. You need to stay ahead of the turnover by having conversations with your employees.

Seek Feedback:

One of the biggest mistakes leadership teams are guilty of is making decisions without consulting the people who need to do the work. Create a space where employees can weigh in on how they could and should use generative AI. This will help shape the roadmap but also give people a sense of ownership. Make sure you're really hearing the feedback and not just paying lip service.

Ethical Implementation:

I have been encouraging leaders to start with their mission, vision, and values. Introducing tech such as generative AI needs to align with those initiatives. Additionally, AI is not perfect. In fact, it's riddled with bias and other potentially non-ethical errors. Why? Because it's a tech created by humans, and generative AI is a reflection of those humans. Make sure you do your homework to ensure that the AI you put in place adheres to ethical standards. If you're not sure what that looks like for your organization, that's where you should start before choosing a tool.

As the CEO, CMO, Director, or other decision maker, you're setting the tone for your employees. Stay open, listen to your teams, and communicate early and often.

Are you considering bringing generative AI into your organization? Reply to this email to tell me about your journey, or [come join the conversation in our Free Slack Group, Analytics for Marketers.](#)

September 20, 2023: Re-Evaluate Your Opinions

Re-Evaluate Your Opinions

For most of my life I thought I didn't like baked apples. Apple pie? No, thank you. Apple crisp? Pass. Apple tarts? I'm all set.

Until today.

Every fall we get apples as part of our farm share. And every year we try to do something with the apples, but fail spectacularly. This year, we also got blueberries. I thought to myself, "self - I wonder if I can make something with apples and blueberries?"

No, I didn't use ChatGPT to figure it out. I did it the old fashioned way with an internet search. By the way, how crazy is it that this is now the old fashioned way to do something? Anywho. Apparently, I was late to the apple and blueberry game. This is not a new combination. I found a simple crisp recipe for apples and blueberries and decided to give it a whirl.

You know what? It's delicious. What I've been missing from all the other apple desserts is the tartness that berries bring. My apple baking world is now wide open!

I could have gone the rest of my life assuming I didn't like any kind of dessert that contained apples. And I would have been missing out. At some point, you need to re-evaluate your opinions and see if they still hold.

This is also true of your marketing strategy. Ah, see? We got there.

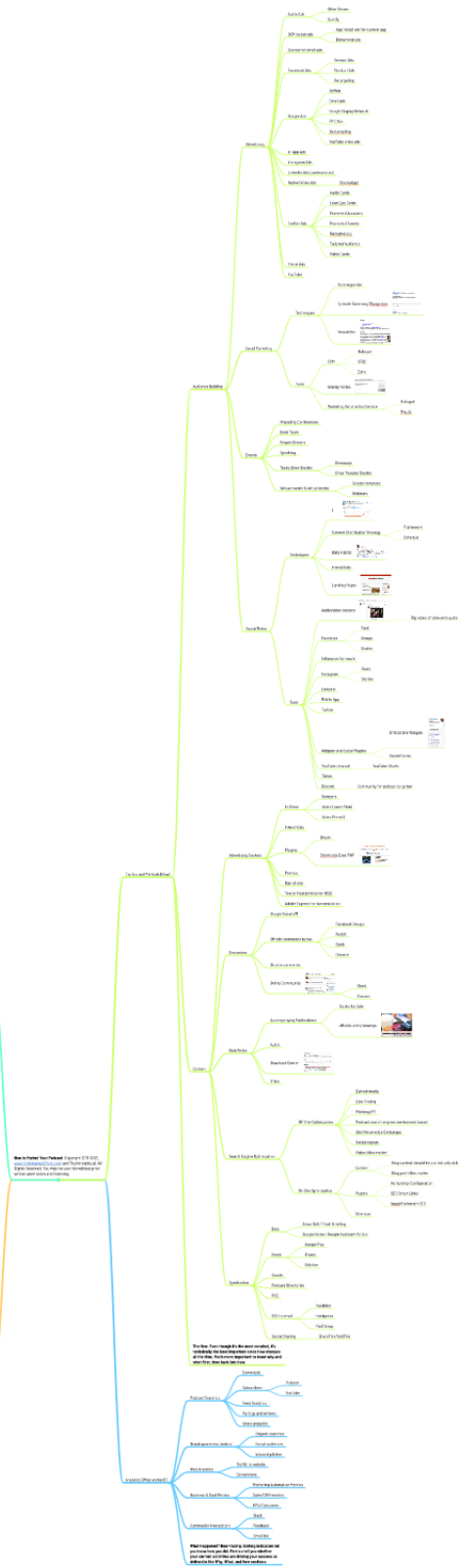
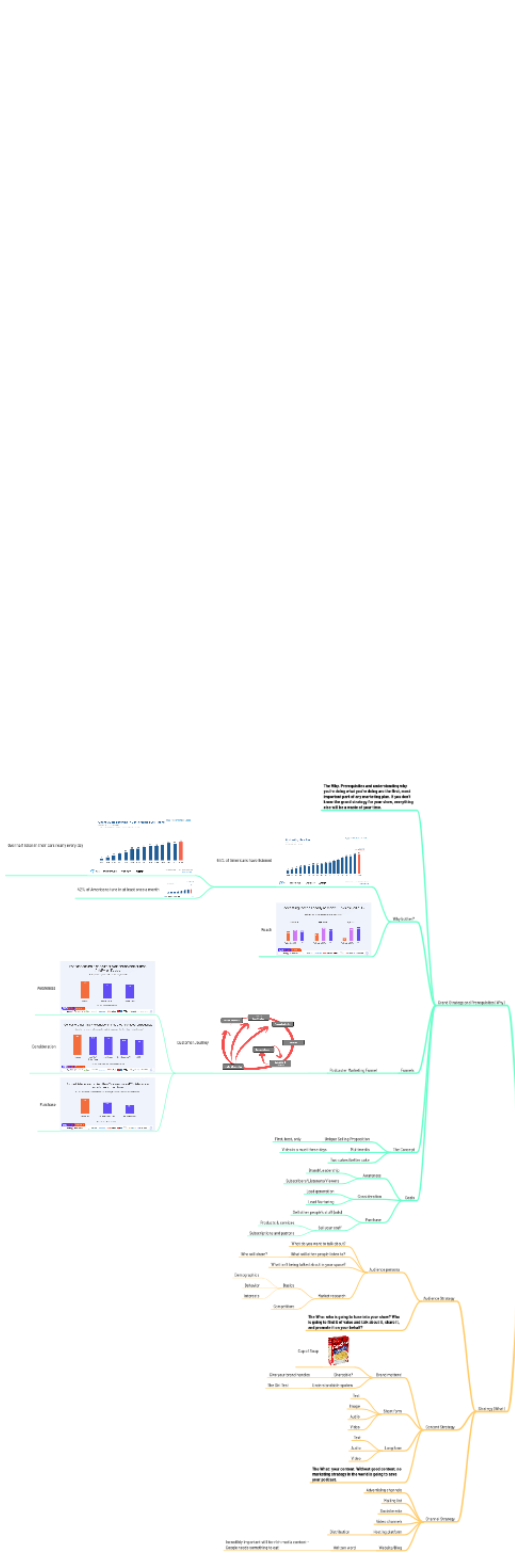
This is the time of year for apple picking and annual planning.

Despite our best efforts, we tend to rush our planning and it becomes

redundant. We might add in a few new tools or initiatives for some flare, but it otherwise remains the same. Why? Because we don't check ourselves. We don't re-evaluate our opinions.

For the past few years, my opinion has been that paid ads is the wrong strategy for Trust Insights. Because of this opinion, we don't run ads. And for the past few years, I haven't re-evaluated whether or not we should be running ads. It's been out of sight and out of mind. Paid ads don't show up on our reports (because we don't run them) so they are a strategy that has been easy for me to forget about.

As we start our own annual planning, I want to evaluate not only what we are currently doing, but what we aren't. There is a big wide world of digital marketing tactics, ripe for the picking.



This is a map of all the different digital marketing tactics that are possible. I know it's impossible to read - that's how many options there are. This is not comprehensive, there are still more tactics not listed. The point isn't to read this map. The point is to show you how many digital marketing tactics there are besides your two or three favorite things.

As you go into your annual planning, I would encourage you to challenge your old opinions. Set up a proof of concept with a digital marketing tactic you thought wasn't right for you. Revisit tactics you've tried before and try them again.

The digital world is constantly changing. Where people hang out and how they get their information continues to change along with it. Your digital marketing strategy doesn't need to get overhauled. It's worth re-evaluating to see if you find a new use for an old tactic you disregarded previously.

How do you like them apples?

It's ok, I'm from Boston. I get to say that. And yet it still hurts because it is grammatically incorrect.

Are you re-evaluating your digital marketing opinions?

Reply to this email to tell me about your journey, or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

September 27, 2023: Marketing Event Attendee Success Guide

Marketing Event Attendee Success Guide

We're in full swing of event season. People are traveling again. And, if you're like me, you have mixed emotions about the whole thing. Prior to Covid, we would publish an attendee's guide to success for each conference and it's about time we brought that back.

- 1 Stay hydrated. This is probably the most important tip. You'll be sitting in dry airplanes and trains to get to the event. You'll be walking a lot. You'll be exerting physical and mental energy for a few days while you take in the whole experience. Staying hydrated is the best way to keep yourself feeling 10/10. If you're able, bring a reusable water bottle. Many events are going green.
- 2 Bring comfortable shoes. If you're headed to Content Marketing World/ Marketing Analytics and Data Science this week, the convention center is 2.3 million square feet. You will want your feet to be comfortable. Protip - bring bandaids for your blisters that will inevitably happen too.
- 3 Bring a light jacket or raincoat. It has rained a lot this year. Record breaking amounts. Make sure you're prepared for whatever the weather throws at you.
- 4 Bring a portable power strip and power banks. Outlets aren't always nearby and you will burn down your phone battery being social. Want to make friends really easily? Be the person at the table that has power. To that, make sure you have all your charging cables and adapters.
5. Arrive with a burning question that you ask everyone you meet. What one question must you get answered in order for the conference to be worth it? If you don't have a burning question, you'll enjoy the show but you won't get the most out of it.
- 6 Plan your sessions in advance. Got that burning question handy? There is no shortage of sessions that will get you excited and inspire new ideas. Make sure you pick out which sessions you want to attend before

the event starts. Many events will have you pre-register for sessions and you don't want to miss the ones you're most excited for.

- 7 Party responsibly. The event planners have been working hard for a long time to make sure that you, the attendee, will have an amazing experience. This extends beyond the daytime sessions. There will be parties, networking, and other activities for you to participate in. Use the buddy system. If you're traveling alone, ask to tag along with another group. Be sure to know your limits.
- 8 Bring earplugs. Events can be a sensory overload between the travel, the crowds, the sessions, and the parties. To give yourself a break, especially if you're a light sleeper, bring a good pair of earplugs. A solid night of sleep will help keep you alert and healthy, allowing you to make the most of the event.
- 9 Make sure your contact information is up to date. Many events are incorporating your professional profile into their apps and scannable codes on your name badge. With all the connections you'll be making, you'll want to be sure that people can easily find you post-event.
- 10 Bring a day pack/bag. There will be times you won't want to lug around heavy luggage or a full laptop case. A small messenger bag will fit the bill perfectly.
- 11 Bring healthcare preventative measures. Events will attract thousands of physical attendees who eat together, stay in the hotels, party together, shake hands, and share the same air, water, and physical proximity. Bring hand sanitizer packs, wash your hands frequently, and mask up, especially if you're arriving by airplane or other form of mass transit. Consult your physician/qualified medical practitioner about taking a multivitamin and/or other immune-boosting supplements.

At the end of the day, you're going to an event to make the most of it, not to hide in your hotel room. Get out there. Meet new people. Learn all the things. But don't forget to take care of yourself. Take breaks from the crowds when you need to. Keep your water bottle full. Bring snacks. And most of all, enjoy it!

Reply to this email to let me know, or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

October 4, 2023: Technology is a Barrier to Connection

Technology is a Barrier to Connection

I recently started a new volunteer position at a local animal shelter. My primary responsibility is to tend to the dogs that are in the shelter. Make sure they have fresh water, fresh bedding, take them for walks, or just sit with them. My job isn't to tell them what they need, but to help re-establish trust so that they are adoptable and can move onto the families they deserve.

This work is hard. This work is heart breaking. But this work is rewarding. This is the same reason I focus so much on people management. It can be hard work. It can be heart breaking. But it can be incredibly rewarding when you see someone succeed.

As I was sitting with some of the shelter dogs, working on rebuilding their trust with humans, it occurred to me that we are at risk. We are so reliant on technology, like generative AI, that we're forgetting how to build relationships and trust with each other.

And you cannot outsource building relationships and trust to a machine. You just can't.

No, this is not a new problem. With each technological innovation we create obstacles, barriers, and excuses for people not to interact with each other. Generative AI is only adding to that. The difference is that instead of just putting up a technical barrier between people, generative AI cuts other people out all together. When you use your phone to text someone, you're still talking to another person. When you're using generative AI, you're not interacting with another person, you're talking to a machine. This machine won't give you feedback on your tone, on your conversation, or on your output. It will just do what it's asked.

And this is the risk. You don't have to spend time with generative AI to build trust. You don't have to say things like, "please" and "thank you" to get an output. As humans, this will allow us to lose all our people and conversation skills.

There are a lot of experts, Trust Insights included, that want to educate on how to craft the best prompts for generative AI. What to include in your requirements to get the best possible outcome. How to interact with generative AI to make it work for you.

What if you spent that much effort into your human interactions? You assessed the needs and approached the conversation in a way that would lay the foundation of what you want to achieve. Then you kept working at it, kept refining based on the output to continue getting better results.

When I was at the shelter, no two dogs behaved the same. I needed to tailor my approach to each situation. I had to gather information, mentally build my requirements, and then adjust as I learned more. When working with Dexter, the 11 year old meatball, I could be more hands on and playful. With Gracie, the shy and timid pup who has grown up in shelters, I had to avoid eye contact and keep my distance. With Joe, the 100 lb German Shepherd who was all energy, I had to assert more dominance and help him learn to be patient.

When you're dealing with humans, you're unlikely to find two that will behave the same or even consistently. You will encounter the extroverts, the shy ones, the energetic ones, and the more relaxed ones. You will learn over time what works when interacting with different people. People will change over time. Your approach will adjust but you will learn more. You will deepen the relationship and strengthen the trust. When you're dealing with machines, you're more likely to get consistent results, but no feedback on how to better adjust your approach. You won't have a relationship. You won't have trust. You'll have you. And you'll have a machine.

All this to say, the more time you spend only interacting with machines, the more your people skills will fade away. If you don't feel like your people skills are strong, use generative AI to practice. Ironic, I know. But instead of

treating it like the machine it is, talk to it like a human. Interact with it the way you would a person, but also ask for feedback. In your prompt, tell it that you're wanting to develop your communication skills. Let it know that you want it to behave like a person would.

Despite what Chris might say, people aren't going anywhere and you have to learn to deal with them. They are the ones that build and manage the machines. They are the ones making decisions about our government, our rights, our health. Learning to work with, instead of against, people will be a skill that companies will covet. It will become harder to find and even harder to master.

So start now. Hone your people skills. Learn how to be a stronger communicator. Master the art of management. We will only see more technological barriers put up, preventing us from connecting. It will get harder. But it is not impossible.

If you want to learn more about how to talk to people and you're at #MPB2B in Boston, swing by my session: Managing the People who Manage the Machines. I'd love to see you!

If you're not at #MPB2B this year and want to continue the conversation, reply to this email or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).



[And if you're interested in learning more about the dogs I mentioned, you can find them here.](#)

October 11, 2023: Understanding Customer Needs With a Purpose

Understanding Customer Needs With a Purpose

Each week when I sit down to write the opening to the newsletter I ask myself, what would be helpful? I don't want to talk (or write) at you. I want to make sure that if you're spending time reading what we've put together for you, that you're getting something valuable out of it.

And therein lies the issue - what is valuable to you might not be valuable to me. That doesn't mean it's not important. It means that I need to work harder to understand your needs to ensure that you're getting them met.

So, how do you, the marketer, go about understanding the needs of your audience? Chris talks about this in the Data Diaries below. You ask them what they need.

A family member reached out to me the other day because he's thinking of starting a business in a saturated market. He feels that he has a unique value that he can add. Because I'm in his target demographic he asked me, "what would appeal to you?" This is a simple, but strong, question. I've been thinking about it since he asked, compiling my thoughts to be as helpful as possible.

When I worked as a product manager, the team wanted to reach out to customers to ask them what they wanted but struggled to do so. We put together a Voice of Customer (VOC) strategy. The plan was overthought, overcomplicated, and overdeveloped. We spent so much time scrutinizing the questions we wanted to ask that we never got around to asking them. We were so paralyzed with concern over getting it right that we never considered what we would do if we got it wrong.

The worst kept secret in VOC research is that it's okay to get it wrong. You

can ask the wrong questions. You can collect the wrong data. You can make the decisions. Yes, you can. What you cannot do is accept that it's wrong and move onto something else.

When I look back at the mistakes I've made in my career, both big and small, I cringe. There were a lot of mistakes I could have avoided if I took action. If I were okay with making mistakes. Asking my customers how we could have improved the product is one of those mistakes I would fix. Hands down, no question.

What should we have done differently? We should have picked up the phone. We should have had a conversation. We should have been more clear on our purpose.

Purpose. That was the heart of the issue. We could not agree on our purpose. That is why we failed to get started. We had a lot of internal agendas and stakeholders. Too many. Each individual had their own set of data they were after, for their own reasons. We failed to see that we were all working toward the same business goal, which was to sell more seats in the product. We let our egos get in the way. We all wanted our own way. So instead of asking basic questions like, "what do you need?", or "what would help you do your job better?", we focused on ourselves. We were selfish and our customers suffered because of it. We put our needs first.

Having a clear purpose is always a good starting point for any initiative. It helps you focus on your "why". When I look back, that's where we went wrong. We didn't focus on the, "why", we fixated on the, "what". We could have benefited from a solid set of user stories.

A user story is a simple, three-part sentence:

As a [persona], I [want to], so [that].

The "persona" would have been each of us. Our perspectives. Every single person involved should have created their own user story. The "want to" would have been our what. What we wanted to do. And the "that" would have

been our why, our purpose. We skipped over this part of the planning process completely and failed spectacularly. User stories would have helped us get out of our own way. We could have refocused on the needs of the customers and not ourselves.

This was a long winded way of sharing my experience with you in the hopes that you would learn from my mistakes and find some value. The take away is to do something. Figure out why you're doing it and then do it. And then learn from it. Do it again. Keep trying. Don't let the process of planning get in the way of doing. Ask basic questions. See what happens.

When I talk to my family member next, I am going to share with him my initial thoughts about his business idea. Then I will suggest other places he should seek information. He'll keep asking until he feels like he has enough to get started, and then he'll ask more questions.

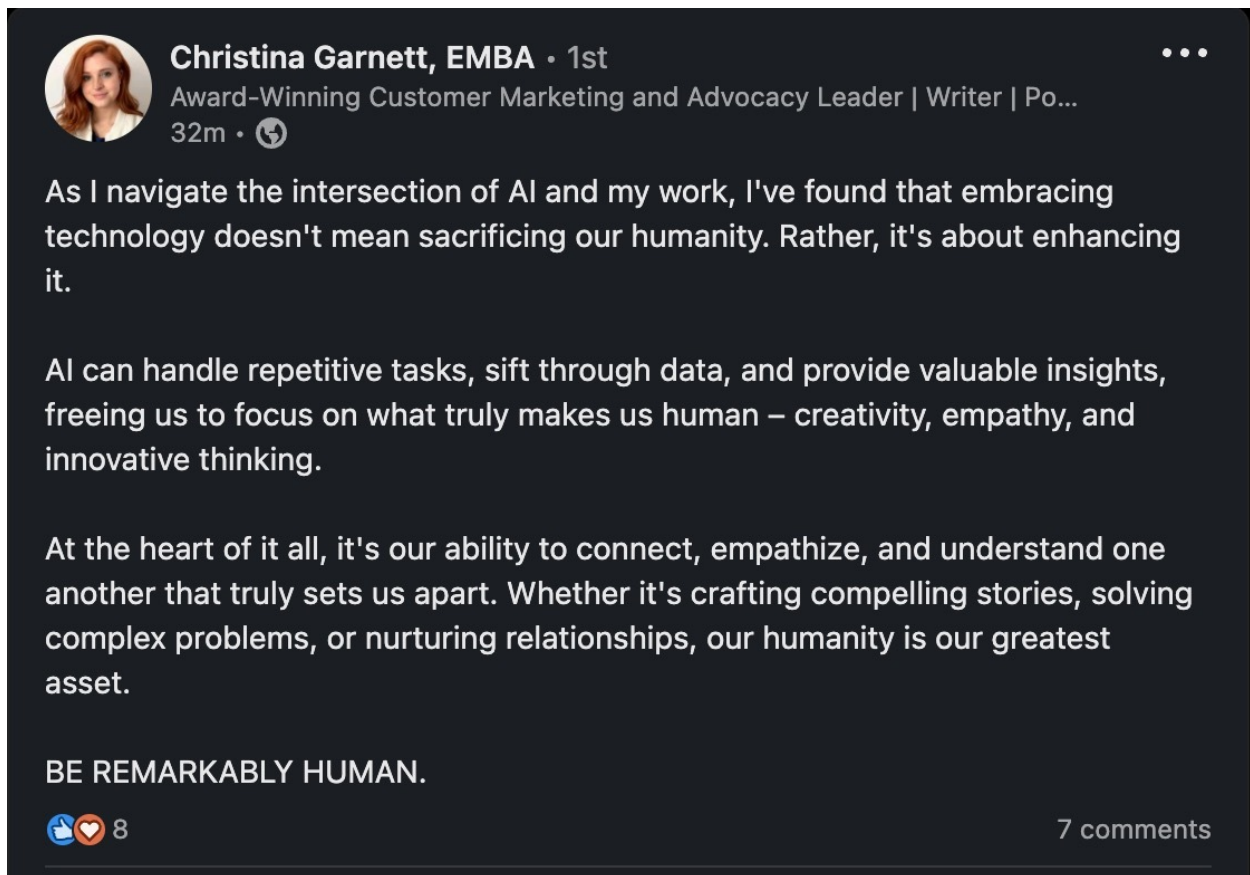
But do it with purpose.

Are you meeting the needs of your audience? Reply to this email or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

October 18, 2023: Be Remarkably Human

Be Remarkably Human

I was about to give some perspective on the Data Diaries post that Chris wrote for this week. I happened to see that Christina Garnett posted on LinkedIn similar sentiments.



Christina Garnett, EMBA · 1st
Award-Winning Customer Marketing and Advocacy Leader | Writer | Po...
32m · 🌐

As I navigate the intersection of AI and my work, I've found that embracing technology doesn't mean sacrificing our humanity. Rather, it's about enhancing it.

AI can handle repetitive tasks, sift through data, and provide valuable insights, freeing us to focus on what truly makes us human – creativity, empathy, and innovative thinking.

At the heart of it all, it's our ability to connect, empathize, and understand one another that truly sets us apart. Whether it's crafting compelling stories, solving complex problems, or nurturing relationships, our humanity is our greatest asset.

BE REMARKABLY HUMAN.

👍❤️ 8 7 comments

[You can read the full post here.](#)

In her post, Christina says, "Be remarkably human". And she's exactly right. AI is giving us this gift of time. Time to deepen relationships. Time to follow

other passions. Time to be human.

In his post, Chris gives examples of how to use AI to summarize data. He gives two versions, the manual and the automated. Both versions require some level of understanding of AI.

It can feel daunting to try to keep up. Keeping up can feel demoralizing when AI is constantly evolving. AI is changing at break neck speed.

What you need to do is decide for yourself how much you want to participate. Some will say that you have no choice. This is only partially true. The tools and platforms you love will incorporate AI into them, making you a user of AI. But you can choose to not be "all-AI-all-day". And that's ok. It does not make your skillset any less valuable.

The world needs humans. Humans that are empathetic. Humans that listen. Humans that care. AI isn't going to do those things for us. We are still in charge of our emotions.

I'll keep it short this week. Let AI do the hard work, the repetitive work, the boring work. As Christina said, you get to be remarkably human.

Where does AI fit into your life? Reply to this email to tell me or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

October 25, 2023: Data Governance

Data Governance

In case you weren't aware, [there were 11,038 Martech solutions](#) available to you as of May 2023. We know that as of now, Q4 2023 there are a lot more to add to that list. Of those, many that are AI-powered tools.

Many of us, me included, are working on annual plans, budgets, and overall "what the heck happened" summaries for the end of the year. As we're planning, we're looking at replacing older tech with new tech, experimenting with AI solutions, and skilling up for the new year.

With that, this is your data governance public service announcement.

Data governance, according to Google's definition, is setting internal standards—data policies—that apply to how data is gathered, stored, processed, and disposed of. It governs who can access what kinds of data and what kinds of data are under governance. Data governance also involves complying with external standards set by industry associations, government agencies, and other stakeholders.

In simple terms, who has access to your data and where do you find it when you need it?

Part of your annual planning should be a data governance audit.

Who owns your data?

If I had a nickel for every time I heard, "That person who set that up doesn't work here anymore" I might have...three dollars? That's a lot of nickels. With 11,038 (and growing!) technology solutions, there is a good chance that you don't know all the usernames and passwords to each account you use. I was working with a client recently that asked me to help them reclaim their accounts because the person that set them up left with little warning. How do

you fix this? You can't prevent people from leaving an organization. Sometimes you have notice and sometimes you don't. A best practice you can start implementing, even on older systems, is to have a general email address that is not tied to one specific person. For example, we use clientservices@trustinsights.ai when we request access to systems for our clients and trial new software for ourselves. This account doesn't belong to either me or Chris, but we both have access to it. With this email, we have a process in place for access. When we bring on contractors we change the password and give them access. When we offboard contractors, we change the password. We don't have to worry about who owns the systems or who has access. The caveat here is that we're a small company and can have this level of control over things. Sometimes Chris will sign up with it with his personal email account to test it out. Once he's evaluated it and we decide it's right for the company we'll set up an account through clientservices@trustinsights.ai.

What if you can't set up a general account?

This is more common than not. Individuals own accounts and then grant access to agencies, contractors, and other employees. In this instance, you should be auditing your software at least quarterly to see who owns your systems. Outside of that quarterly audit, you should develop a process for employee and agency turnover. Because you're auditing your systems and you know who owns them, you can have protocols in place for hand-offs. This could include something as simple as a password reset and more complex solutions such as migrating data to new setups. Before you get to that, you first need to know who owns your data.

How do I get my data out of an account I don't own?

Great question. Sometimes you can't. This is why it's important to know who owns the data and how you can regain ownership of your software. In the event you need your data and you don't have access you might need to stand up a new system, which is the last possible option you want to consider. This is a pain and you lose access to historical data. The upside, if you are someone who chooses to see them, is that setting up a new system is an opportunity to do it the right way. Again, not a great option but sometimes it's your only

one.

In less regulated industries and companies, we don't give a lot of thought to the accounts tied to our systems. We bring on companies [like Trust Insights](#) to set up our systems, analyze our data, and report it back to us. And then we forget that we gave up access to our data to anyone because we're focused on marketing tactics, revenue generation, and growth.

So, if you do nothing else to protect your data moving into 2024, make sure you know who owns it and who has access. Remove people that no longer work with it. Make sure the right people have ownership and level of access. Set up protocols for inevitable turn over. Create process for trialing and setting up new systems.

Are you paying attention to your data governance? Reply to this email to tell me or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

November 1, 2023: Using ChatGPT for Survey Analysis

Using ChatGPT for Survey Analysis

Last week we ran our quarterly 1 question survey. We asked, "If you had money left over in your marketing budget this year, what would you spend it on?"

[You can still respond to our 1 question survey here:](#)

We're seeing budgets cuts across the board. So, our goal was to understand what's is on the wish list so that we could see how to address it through content and other resources.

Because it's a simple form, I can export the data into a CSV file. And then it occurred to me. Why should I struggle through analyzing this data when I can ask my pal, KatieGPT to do it for me?!

Ok, we haven't yet built KatieGPT, so I'll use ChatGPT instead.

For this exercise, I used GPT4 which allows you to upload data sets for analysis. And like every interaction with ChatGPT, you need a prompt. Mine was super basic:

"You are a market research analyst and you asked your audience "If you had money left over in your marketing budget this year, what would you spend it on?" You are analyzing the data to be easily understood.

Attached are the responses.

This is what you need to answer:

What are the overall themes?

Can you put these responses into some kind of chart?

What was surprising?

What will people primarily spend their budgets on?

Show your work

Provide a download links for any images or charts"

When I saw Andy Crestodina present his session on using GA4 data for SEO a few weeks ago, he did so using ChatGPT. It was really straightforward but incredibly powerful. One of the pro-tips that stood out to me was to ask ChatGPT, "provide a download link". So simple. So genius. Thanks, Andy!

Here is what ChatGPT told me was in the data:

- 1 Overall Themes:
 - Research and analytics tools
 - Data and design improvements
 - Marketing and website enhancements
 - AI and training
 - Marketing strategy and tools
- 2 Primary Areas for Spending:
 - People are primarily interested in spending their leftover marketing budgets on AI and training, followed by marketing strategy and tools.
- 3 Surprising Insights:
 - A significant focus on AI and training indicates that marketers are keen on leveraging AI to enhance their marketing efforts and are willing to invest in training to better understand and utilize AI tools.

It's interesting that ChatGPT thinks AI education is a suprising insight. I

don't find that surprising at all.

And when we drill down into the themes themselves:

- 1 Research and Analytics
 - Keywords: research, tool, analytics, help, consultant, clients, user, track, streamline, engagement
- 2 Data and Design
 - Keywords: data, figuring, design, bad, cleansing, added, prevent, processes, leverage, thrive
- 3 Marketing and Website
 - Keywords: money, ai, marketing, new, website, meetup.com, asking, left, cms, content
- 4 AI and Training
 - Keywords: ai, training, marketing, video, budget, order, insights, education, id, tools
- 5 Marketing Strategy and Tools
 - Keywords: marketing, tools, ability, great, strategy, new, use, years, year, unified

Ok, this is interesting. I'm starting to see the specific language used within each theme. This is pretty valuable to any marketer.

Because I was curious to see it visualized, I also asked for a chart and a word cloud. Here's the word cloud, but I don't find it to be super helpful:

How are you using AI to understand your audience? Reply to this email to tell me or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

November 8, 2023: Solving Specific Problems With Predictive Analytics

Solving Specific Problems With Predictive Analytics

Last week, John and I walked through how we do our predictive analytics and forecasting.

[You can watch that replay here.](#)

Even though we already covered the "what" and "how", I want to dig more into the, "why".

Why should you use predictive analytics in your marketing? More importantly, how do you convince your team and decision makers that you should be using it?

A million years ago when I worked at a different company, we developed a computerized self-guided intake tool for clinicians. At the time, they were revolutionary. Now they are common place. When we rolled out this innovative new tool, we struggled to sell it. People would ask why they should work it into their budget. We'd say that, "It saves time and saves money".

Yikes. That's weak.

While the product might be saving time and saving money, it wasn't a specific enough solution. It wasn't compelling enough to convince decision makers to invest in this product. We failed to tell clinicians that would have found efficiencies in their clinical workflow and allowed them to see more patients. We failed to tell them that their time with their patients would have been more valuable. We failed to tell them that they wouldn't spend their time collecting data. We failed to tell them that they could focus on solutions.

Looking back, it was such a missed opportunity. We were academics and

clinicians, not marketers. Communication wasn't a strong point within the company. We struggled to explain in real terms why adopting this tool was the right move.

I don't want to make those same mistakes again. And I want to arm you with the talking points you need to help your decision maker understand the value proposition of predictive analytics.

A predictive forecast saves time and saves money. Great. So what?

When I say that a predictive analysis saves time and saves money, I'm not speaking to you. I'm speaking to the general population. So you ignore me. I haven't solved your specific problem.

[A very smart person](#) once told me to put things in the context of heaven and hell. What kind of heaven will someone experience if they use the thing, and what kind of hell will the experience if they don't?

The purpose of the heaven and hell exercise is to tap into the emotional side of decision making. You hearing predictive analytics saves time and money doesn't resonate. It doesn't resonate because you're not hearing how it specifically saves you time. You're not hearing how it specifically saves you money. You're not hearing how it solves your problems.

I'm not telling you how it saves you time so that you no longer have to do keyword research every time you need to create new content. I'm not telling you how it saves you time because you'll have a plan laid out in front of you for the next quarter. I'm not telling you how it saves you money because you can more efficiently create topic outlines to hand off to writers. I'm not telling you that it saves money because you're not spinning your wheels trying to figure out what your audience wants next. I'm not telling you that it saves you money because you're meeting your audience where they are at the right time.

When we dig into the actual problems, the things that keep us up at night, we can start to articulate more clearly how our solutions solve those problems.

There is no shortage of solutions in search of problems. But there is a shortage of solutions that solve our specific problems. And our job as marketers is to help other people see that we understand their problems. Not only do we understand their problems, we have the same problems. And because we understand their problems and have them too, we know what solutions will work and how.

So, back to predictive analytics. We've established that it's not good enough for you to tell your decision makes that it saves time and saves money. We've determined that you need to think about the problems they are specifically facing. Maybe you're cutting budgets. Maybe you're cutting other resources. Maybe your search traffic is dropping. Maybe your audience isn't giving you the information you need to create helpful content. Investing in predictive analytics can help you with those transitions. It's a low cost tool with many uses. It's a tool that will help your team focus. It's a solution that requires minimal education to get started.

I'd be happy to talk to you more about your specific problems. Then together, we can craft language about how predictive analytics solves those problem. You can then bring that conversation to your decision makes and have one less thing keeping you up at night. Reply to this email to tell me or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

November 15, 2023: Build a Custom GPT Model

Build a Custom GPT Model

Did you know you can now clone yourself?

Well, sort of.

Over the weekend, OpenAI rolled out the ability to create your own custom GPT model. Pretty cool, right?

Let's not get ahead of ourselves. There are still a lot of limitations and considerations. As an experiment, Chris and I (mostly Chris) build a KatieGPT, using newsletter content as the foundation for the database. Since I've been writing the newsletter every week for a few years, there is a decent amount of content to pull from.

Once we loaded the content, gave some guidelines, and most importantly, updated the avatar, it was time to see what KatieGPT was capable of.

You

What are Katie's latest thoughts on management?

GPT

KatieGPT

I searched through the available documents for specific insights into Katie's latest thoughts on management but couldn't find any direct references or detailed discussions on this topic. Her writings cover a variety of subjects, including marketing strategies, productivity, and the impact of technology on our work and

personal lives, but they do not explicitly focus on her current views or philosophies regarding management.

If you're looking for general insights on management from Katie, it might be helpful to consider her overall approach to topics like data-driven decision-making, transparency in communication, and the importance of adapting to change, as these themes could potentially reflect her management style and philosophy. However, without specific references in the documents, I can only make broad assumptions based on the general tone and content of her writings.

Welp.

I'm underwhelmed by KatieGPT. For context we gave the system all my cold opens from 2022 and most of the opens from 2023. I talk about management a lot. That's what I do. That's my area of expertise. However, despite having content that covers that topic, my doppelgänger had trouble finding useful content.

A couple of things could be the problem here. First, it could be that I don't talk about management as much as I think I do. But let's be honest, that's not the issue. More realistically, we haven't given the system enough content to work with. We also haven't given enough diversity in the content. While the cold opens are good, they are from one point of view. They are me, talking to you, about a topic. They aren't give and take. They have a specific tone.

My next step to start refining KatieGPT is to pull podcast and livestream transcripts. Then I would look for transcripts from talks and webinars. Next I would look at online conversations (where appropriate) and load all that content into the custom GPT model. The more data you give the system, the better the output will be.

This is, admittedly, an over simplification of building a custom GPT model. I'd recommend you go through actual planning exercises, like user stories, to help figure out what you need and how you'll use it. Experimenting with a custom GPT model should be just that, an experiment. If you decide to use your model publicly, you'll want to be much more thoughtful with how you build it. Think about the data you should be sharing. Think about the end user

and what they will get out of the custom GPT model. Think about the maintenance plan and how you'll keep the system up to date.

If you want more details on building a custom GPT model, or how we set up KatieGPT, [you can check out this week's podcast](#).

Do you plan on building your GPT clone? Reply to this email to tell me or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

November 22, 2023: Thanksgiving 2023 Edition

Thanksgiving 2023 Edition

As is our tradition, this is the annual Trust Insights Thanksgiving newsletter. Every year our newsletter before Thanksgiving is a compilation of recipes and suggestions for leftovers.

We're sticking with tradition, but with a twist this year. We built a Custom GPT model to generate recipes. I know, you're shocked.

We loaded up the GPT model with lots and lots of recipes as plain text. We gave instructions in terms of style and ingredient considerations.

I asked the system to give me a list of unique dishes for Thanksgiving. The first pass was decent. Because Chris built the system, I could see how it initially gives me dishes based on his food preferences. He likes sugar, I don't. This was the first list that the system generated.

For a unique and memorable Thanksgiving dinner, you might consider incorporating some unconventional dishes that still capture the essence of the holiday. Here are a few ideas, drawing from my knowledge source and culinary expertise:

Korean Beef Bulgogi as a Main Dish

This dish, featuring savory and slightly sweet flavors, can be an excellent alternative to traditional turkey. Serve it alongside typical Thanksgiving sides or with a Korean twist, like kimchi or japchae (stir-fried glass noodles).

Turkey and Pumpkin Curry

Give a global spin to your turkey by preparing it in a rich and aromatic

pumpkin curry. This dish can bring a warming and spicy element to your Thanksgiving table.

Sailor's Pie with a Thanksgiving Twist

Inspired by a recipe from the game "World of Warcraft," you can adapt this dish using Thanksgiving flavors. Use turkey instead of fish and incorporate traditional Thanksgiving herbs and spices for a unique take on a casserole.

Thanksgiving Leftover Wontons (Turkey Rangoons)

A creative way to use leftovers, these wontons can be made with turkey, stuffing, and mashed potatoes, served with cranberry sauce as a dipping option.

Cranberry and Brie Stuffed Pretzels

Combine sweet cranberry sauce with creamy brie inside homemade soft pretzels for a delightful appetizer.

Pumpkin Spice Risotto

For a side dish with a twist, try making a creamy risotto infused with pumpkin puree and traditional pumpkin pie spices, topped with parmesan cheese.

Brussels Sprouts with Bacon and Maple Syrup

Add a sweet and savory touch to Brussels sprouts by sautéing them with bacon and a drizzle of maple syrup.

Sweet Potato Gnocchi with Sage Butter

Homemade gnocchi made from sweet potatoes, served in a sage-infused butter sauce, can be a unique and delicious side dish.

Apple Cider Glazed Carrots

Glaze carrots in a reduction of apple cider, adding a natural sweetness and

autumnal flavor to this common side dish.

Pecan Pie Cheesecake

Combine two classic desserts into one by creating a cheesecake with a pecan pie filling, perfect for a Thanksgiving sweet treat.

These dishes offer a mix of traditional and unconventional elements, bringing both comfort and surprise to your Thanksgiving dinner.

The beauty of a custom model, or any generative model, is that you don't have to accept the first outcome. You can iterate. I asked a follow up, to list unique dishes that were not sweet. Here is what I got back:

For unique, savory recipes that aren't sweet, you can explore a range of creative and flavorful dishes that would be great for any occasion, including Thanksgiving. Here are some innovative recipes:

Savory Pumpkin and Sage Soup

Ingredients: Roasted pumpkin, vegetable broth, fresh sage, onion, garlic, olive oil, salt, pepper.

Chorizo and Sweet Potato Hash

Ingredients: Chorizo sausage, sweet potatoes, bell peppers, onions, garlic, smoked paprika, olive oil, salt, pepper.

Cauliflower Steaks with Herb Salsa Verde

Ingredients: Large cauliflower heads, olive oil, garlic, mixed fresh herbs (parsley, cilantro, mint), capers, lemon juice, salt, pepper.

Spiced Lentil Stuffed Bell Peppers

Ingredients: Bell peppers, lentils, onions, garlic, cumin, coriander, tomato

paste, vegetable broth, olive oil, salt, pepper.

Mushroom and Leek Galette

Ingredients: Puff pastry, mushrooms, leeks, garlic, thyme, goat cheese, olive oil, salt, pepper.

Roasted Eggplant with Tahini Sauce

Ingredients: Eggplants, tahini, lemon juice, garlic, parsley, olive oil, paprika, salt, pepper.

Zucchini Ribbon Salad with Lemon and Parmesan

Ingredients: Zucchini, lemon zest and juice, Parmesan cheese, olive oil, pine nuts, salt, pepper.

Stuffed Portobello Mushrooms with Spinach and Feta

Ingredients: Portobello mushrooms, spinach, feta cheese, garlic, onion, olive oil, salt, pepper.

Butternut Squash Risotto

Ingredients: Arborio rice, butternut squash, chicken or vegetable broth, Parmesan cheese, onion, garlic, white wine, butter, sage, salt, pepper.

Herb and Garlic Roasted Chicken

Ingredients: Whole chicken, fresh herbs (rosemary, thyme, sage), garlic, lemon, olive oil, salt, pepper.

These recipes bring a variety of flavors and textures to the table, offering a delightful departure from typical sweet dishes.

What I love about this process is that these are all dishes I wouldn't have thought of. I can keep iterating, asking the system to omit or insert different ingredients for different tastes. I can truly customize my dinner experience

within a few minutes.

What unique dishes will be around your table this year? [Come tell me about it in our free Slack group, Analytics for Marketers »](#)

Happy Thanksgiving and happy iterating!

November 29, 2023: Perspectives on Failure, Part 1

Perspectives on Failure, Part 1

Earlier this week [I wrote about a failure I had recently](#). I didn't share the story to get reassurance, but to remind people that failure happens to all us, and then we move forward from it.

But here's the thing. Failure happens to all us, but we don't all move forward. Many hide it, refuse to acknowledge it, or even recognize it.

In business, we equate a lack of failure with being risk adverse. We see companies and leaders who seemingly never fail. They make all the right moves at all the right times.

I call bullshit.

This is a lie. Everyone, every company, fails. But we don't talk about it. Well, we talk about it theoretically, but we don't share what really happens. We give lightweight examples where we have a resolution.

Admitting failure means being vulnerable. Owning failure means dealing with the fallout. It's scary. It's unpredictable. It can feel unsafe.

There is no shortage of content about failing. [Freakonomics just released a new podcast series that you can listen to here](#).

I asked KatieGPT what I would say about failure. This is the response she gave me:

"Reflecting on Katie's perspective, failure is not just an inevitable part of the journey; it's a necessary one. She would likely emphasize that failure is a critical component of learning and growth. It's through the challenges and setbacks that

we gain the most valuable insights and develop resilience. Katie would probably encourage embracing failure as a stepping stone rather than a roadblock, viewing each misstep as an opportunity to learn and adapt.

In her approach, failure isn't a reflection of personal inadequacy but rather a normal part of any process, especially in areas like business, analytics, and personal development. She would advocate for a mindset that sees failure as a source of actionable feedback, guiding future strategies and decisions. The key is not to dwell on the failure itself, but to extract lessons from it and move forward with greater knowledge and experience.

Katie's advice would likely include practical steps for dealing with failure, such as conducting a thorough analysis to understand what went wrong, adjusting strategies accordingly, and maintaining a positive, growth-oriented mindset. In essence, she would view failure not as a defeat, but as a vital component of the path to success."

That's not too bad, actually. But it's incomplete. It makes me wonder, why are we ok talking about failure, but not admitting that we do it? And the answer is, I don't know. Sure, it's scary as stated above. But there is more to it, right? There has to be.

So, I'm going to do something I don't normally do and leave you with a cliffhanger. Eeek!

To get to the answer, I want to hear from you. I want to do more digging. I want to gather more perspectives than just my own.

I end every newsletter with a call to action to reach out to me. And I always hope you will. I don't say it to say it. I mean it.

Reply to me to tell me your perspective on failure or [come join the conversation in our Free Slack Group, Analytics for Marketers.](#)

December 6, 2023: Embracing Failure: Why We Shy Away But Shouldn't

Embracing Failure: Why We Shy Away But Shouldn't

In last week's newsletter I started the conversation about how we only sort of talk about failure. And then I asked you to help me understand why we are so cagey about it. We are comfortable talking about failure at a high level when there is a clear resolution. But we don't go beyond that surface level.

You came through. You responded. I heard some very strong themes: lack of control, ego, lack of self-awareness, perception of competency, and exposure of weakness. Let's dive into each and see if we can't come up with some solutions.

Lack of Control

We love to feel in control – of our careers, businesses, and lives. Admitting failure feels like admitting that not everything is in our power. But here's the catch: failure is often where we learn the most valuable lessons. It's where we find the resilience to adapt and innovate. Embracing failure means embracing growth, and growth is rarely within our full control. Let's start acknowledging that we don't have nearly as much control as we think we do.

Ego

Even the most humble person has an ego. Our egos can be fragile. Admitting failure can feel like admitting defeat. Admitting defeat can be a direct hit to our self-esteem. But there's an incredible strength in vulnerability. A super power. Being honest about our shortcomings doesn't diminish our achievements; it humanizes them. In the age of generative AI, being even more human is necessary. We can be proud of our accomplishments and admit our mistakes. They are not mutually exclusive.

Lack of Self-Awareness

Sometimes, we don't talk about failure simply because we don't recognize it. In world of business and analytics, or even in our own busy lives, taking a step back to reflect isn't always a priority. Regular self-reflection is crucial. This is hard to do and an even harder habit to build. A good first step is journaling. No one is asking you to write a novel. You don't even need a physical journal. Take five minutes at the end of every day and acknowledge what went well and what didn't work. Over time you'll be able to dig deeper into the things that didn't work because they will be more top of mind. Don't miss opportunities to learn because you're not paying attention.

Perception of Competency

We often worry that admitting failure will make us seem incompetent. Being judged is scary. Being judged by our peers is even scarier. But pretending to be infallible is just that, pretend. We all fail. True competency includes the ability to learn from mistakes and the courage to discuss them openly. This transparency fosters a culture of trust and continuous improvement, both in ourselves and in our teams.

Exposure of Weakness

There's a common misconception that acknowledging failure is akin to showcasing weakness. I've had teams and staff try to hide mistakes out of fear of exposure. You can probably guess what happened. Instead of dealing with the issue, it only got bigger and deeper. I'll admit, it takes considerable strength to say, "I messed up, but here's what I'm doing about it." But this is the key, as long as you have a proposed solution, right or wrong, people very quickly forget about this failure. Most of us are eager to move on and get things done. You failed? Ok, what's next?

Use Failure as a Stepping Stone

Speaking of getting things done, let's collectively shift our mindset. Failure is not the opposite of success; it's part of it. When we talk about our failures, we create a culture that values learning and resilience instead of perfection. We allow for transparency and trust. We create a space where we grow, not just as professionals but as individuals.

The path to success starts with lessons from our failures. Embrace it, learn from it, and most importantly, talk about it. You'll quickly find out that you're not alone!

Have you had an experience where acknowledging a failure led to a significant learning moment? Share your story with me – let's learn together. Reply to this email, or [come join the conversation in our Free Slack Group, Analytics for Marketers](#).

December 13, 2023: Generative AI for Marketers

Generative AI for Marketers

Each week I try to talk you through some kind of problem and solution. This week, I only have solutions to share with you!

AI has shaken up everybody, some have embraced it, others are hoping it will go away. There's no reason for you to be afraid, I'm very excited to tell you about the Generative AI for Marketers course that we've released today!

You don't have to be one of those marketers living in fear; we've transformed our super popular full-day workshop into a flexible, self-paced online course. Why? Because we know your time is precious, and learning about AI shouldn't feel like another chore.

If you want to cut to the chase:

[Here's the link: trustinsights.ai/aicourse](https://trustinsights.ai/aicourse)

Here's the discount code good for \$100 through the end of the year: **KATIESENTME**

If you want to learn more about what you'll get, keep reading.

Here's what makes Generative AI for Marketers stand out:

- **Hands-on Learning for Six Major Use Cases:** These are not theoretical use cases, but scenarios that you will, or already, have faced.
- **Sales Pitch for Internal Stakeholder Buy-In:** You'll be able to talk the "let's AI everything leaders" off the cliff and back to a realistic starting place.

- **Guidance on Team Composition:** To effectively operate Generative AI, you need more than just someone pushing the buttons.
- **Building Your Custom AI:** Fun fact, I wrote this post with the help of KatieGPT. It's scary how much she's starting to sound just like me.
- **In-Depth Tactical and Strategic AI Knowledge:** Gain both the strategic and tactical smarts to steer your team through the AI landscape.
- **Task Prioritization with AI:** It's easy to get overwhelmed with a lot of new information, so we'll give you tools to help figure out where to start.
- **Preview of Upcoming AI Innovations:** Gain a sneak peek into the future of AI, including generative video advancements. AI is only going to keep evolving and we want you to be ready for what's coming.
- **Certification of Completion:** A testament to your commitment and new-found expertise. This will look great on your LinkedIn profile!
- **Extensive and Engaging Content:** Over 20 modules, featuring more than 4 hours of content, exercises, quizzes, and templates. Don't stress, we broke these modules down into bite-sized pieces, meant for you to come back to over and over.

This course is how you're not only going to keep up, but you'll keep getting ahead. It's about empowering you to be that person in the room who says, "I know where we can start with AI, and how to do it!"

Remember how I said we adapted this from our popular workshop? Here is real feedback from participants:

Holly B, owner of a marketing agency:

"Great workshop with Christopher Penn. Thank you for leading us through a helpful and insightful day of AI learning and experimentation, real hands-on work."

Jeff M, growth marketer in the biotech industry:

"AMAZING AI workshop with Christopher Penn. So many new ideas to take back

to our team, stuff they can immediately use."

If you're not convinced yet, reach out to me. Let's talk it over, yeah?

Are you ready to jump in with both feet? I have a discount code for you! Use code KATIESENTME to get \$100 off right now! (This code is good through the end of the year)

[Go get your seat and get started!](#)

I should probably also mention that we'll be opening up a channel just for course participants in our [free Slack Group, Analytics for Marketers](#). You'll get continual support from me, Chris, John, and others that have taken the course.

Blatant Promotional Message

Imagine a world where your marketing strategies are supercharged by the most cutting-edge technology available – Generative AI. Generative AI has the potential to save you incredible amounts of time and money, and you have the opportunity to be at the forefront. Get up to speed on using generative AI in your business in a thoughtful way with our new offering, Generative AI for Marketers, which comes in two flavors, workshops and a course.

Workshops: Offer the Generative AI for Marketers half and full day workshops at your company. These hands-on sessions are packed with exercises, resources and practical tips that you can implement immediately.

TrustInsights.ai/aiservices

Course: We've turned our most popular full-day workshop into a self-paced course. The Generative AI for Marketers online course is now available! Register today with discount code KATIESENTME to save \$100 off your tuition.

TrustInsights.ai/aicourse

Key takeaways you'll receive:

- Hands-on learning for the six major use cases. When you're done with the course, you'll have your first collection of working prompts based on your business and needs
- A plan and sales pitch to help you sell the use of AI internally to stakeholders

- A roadmap for who should be on your AI pilot team and your internal AI council
- Your first custom AI that you will build for your business (paid version of ChatGPT required)
- Tactical and strategic knowledge of generative AI to help you lead your team in the new AI landscape
- A priority matrix of the tasks you'll want to consider for AI enablement

Still not sure? Here is what other marketers had to say after attending the workshops:

Emily D, marketer at a design firm: This workshop was a deep dive into the intricacies of multi-modal generative AI and large language models (LLMs) will pave the way for rapid advancements in AEC. With a myriad of potential applications to every facet of the industry, companies will need to nimbly navigate change, craft new brand strategies, refine data, and redefine internal processes. I loved this event and how informative and hands-on it was.

Holly B, owner of a marketing agency: Great workshop with Christopher Penn. Thank you for leading us through a helpful and insightful day of AI learning and experimentation, real hands-on work.

Looking for something else? Book a time to talk about a custom project.

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Katie