# Letters from the Corner Office

2022 Insights from Katie Robbert

CEO, Trust Insights

TRUST INSIGHTS

## Foreword and Introduction

One of the most powerful things you can do with your own content is to repurpose it, reuse it, give it another life. You spent so much time and effort on it in the first place, why not keep working with it to make the most of it?

That's what this book is - it's notes from the corner office, from Trust Insights CEO Katie Robbert. It's her wit and wisdom from all of 2022, tidied up and put in one place so that you can look back at the year that was with her and gain useful perspectives on everything that happened in 2022.

Thank you for being a part of the Trust Insights community, whether just a reader of our newsletter, a member of our Analytics for Marketers community, or a client. No matter what your role is, we appreciate you and we wish you health, happiness, and prosperity in 2023.

*Katie Robbert & Christopher Penn*

*Trust Insights, Inc.*

*December 20, 2022*

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## January 5, 2022

## Disadvantages of Predictive Analytics

In 2018, back when I was fresh-faced, full of energy, and had an endless well of optimism, I wrote this blog about the issues with predictive analytics.

Now, 3+ years later, when I have permanent circles under my eyes, I never know what day it is, and an ounce of optimism sounds sarcastic, I want to revisit this post to see what's changed.

In 2018, I talked about Black Swan Events. Oh, how little 2018 Katie knew. She did not know that in 18 short months she would be in a global pandemic. Therein lies the definition of a Black Swan Event - it's something unforeseen.

The disadvantage of predictive analytics almost two years into a global pandemic is that most historical data that pre-dates March 2020 is irrelevant. So much has changed about how we live our lives, how supply and demand operate, and how we view the world, that using that data won't give you a sense of how to plan your marketing.

How do we overcome this disadvantage that is throwing off our analysis?

### Look at more than one data source

Sure, you can look at only your data. However, it might not tell you the full picture of what is going on. You may also consider looking at other publicly available data sources as a gut check. Looking at outside data sources can help color the story of what's going on within your business. Try thinking beyond the digital channels. Here are some examples:

Data.gov is the US Governments open data. You can do research on topics such as local government and climate issues.

Bureau of Labor Statistics can keep you updated on the job market. If unemployment rates go up, there are certain products and services that will cease to be viewed as necessary.

Federal Reserve Economic Data (FRED) can help you understand economic factors that can help predict consumer behavior.

### Forecast shorter periods of time

Given that just about every dataset either spiked or declined in March of 2020, consider shorter time periods for your predictions so that you can remain agile. I would not recommend using a predictive forecast for an entire year's worth of planning. You can use it as a guide, but know that the data will likely change. A better plan is to look at quarterly, monthly, or even weekly trends if you have the resources to do so. Doing this will allow you to make changes faster as you learn what's working.

### Some trends don't change

Despite the pandemic, humans are creatures of habit. We still make New Year's resolutions, we still celebrate holidays, we still take summer vacations. What's changed is how we approach these things. As you're looking at your keywords and forecasting, be sure to include qualifiers such as "virtual", "remote" and "alternatives".

Are you looking for some help with your planning and want to see how a predictive forecast fits into your marketing? Give us a shout!

***- Katie Robbert, CEO***

**January 12, 2022**

## Pros and Cons of Hiring a Marketing Consultant

In the past year, we've seen the "Great Resignation" - people quitting their jobs in large numbers in search of something different, something better.

That leaves teams and companies short-handed. You might be able to get away with asking people to take on more responsibility for a short while, but it's not a sustainable plan. To fill the gap you may consider a marketing consultant.

Before you hire a consultant, here are some things to consider:

### Pros of hiring a marketing consultant

*Flexibility*
You may have a project that you only need help with for a couple of months. In this case, hiring a consultant is a great choice because you can quickly get the extra resource you need without needing to go through a formal hiring process. As the project winds down you can part ways. The consultant will move on to other things and when you need help again you know who you can call.

*Varied Skill Sets*
Let's say a client or customer comes to you with a project that requires email marketing and paid ads. Hiring a consultant is a fantastic option. You can find someone who can do both or you can find two consultants who specialize in each thing. Consultants tend to stay up to date on their skills, making it easier for them to find new work. This will also allow you to change the scope of the contract with your consultant without having to find someone new.

*Varied Levels*
One of the nice things about hiring consultants is that you will have access to experience at all levels. If you need an analyst to pinch-hit you can find that. If you need a strategist to help problem-solve for a couple of months, we're out there!

And since you can't have the good without the bad to balance it all out:

### Cons of hiring a marketing consultant

*Integration*
Consultants will have a more challenging time integrating themselves into the company culture, especially if they are on a short-term contract. If you're wanting to find a resource that is with you and your team long-term, a consultant may not be the right option.

*Competing Priorities*
This is going to be hard to hear. You are not their only client. One of the jobs of a consultant is to be present and engaged with every single one of their clients. This makes the client feel like the consultant works only for them. In reality, consultants may have a handful of clients that are all clamoring for their attention at the same time. If you don't want to compete for your resource's attention, a consultant may not be for you.

*Professional Development*
As mentioned above, consultants tend to keep their skills up to date. While they are always looking to learn new things, those things may not be what you and your team need. Depending on your contract, you might be able to ask your consultant to learn a new skill to meet your needs but don't rely on it. If you need to have a little more control over the skillset of your resource, a consultant may not be the right person for you.

Admittedly, I'm biased toward hiring consultants. In case you didn't know, this is what we do at Trust Insights. We support your existing team, bring a set of skills you may not currently have, and help you hire the right people. As your team grows and you're finding that you need different skills, consider a consultant to help with the transition. If you're not sure what you need, a consultant is also a great choice as we can help you figure it out!

Are you a consultant, or working with consultants? Tell me about it in our Free Slack Group, Analytics for Marketers

***- Katie Robbert, CEO***

## January 19, 2022

## Two Types of People

When you hear the phrase "two kinds of people" you're probably assuming people that are polar opposites. People who do something and people who don't.

For this post, I want to talk about two types of people that are complementary to one another, instead of opposites. Last week I was talking with a friend about how we both work alongside people who are deep in technology and that the role that we play for those people is of "translator".

What is a translator in this context? It is someone who can break down the advanced ideas into more understandable concepts and teach others how to use the technology in a practical way. For example, when Chris puts an analysis together, he'll send it to me to pull out actionable insights. If I struggle to even get to the "so what" of it, we start over and refine. The goal is to take advanced machine learning analysis and figure out how to apply it in everyday marketing.

Translators and technologists aren't the only pairs you'll find in a business. You likely also have doers and facilitators. Generally speaking, teams will have a facilitator who is calling the shots, setting the priorities, and managing the task list. Then you'll also have the doers, the people doing the work. This isn't to say that someone can't be both, or that if you are one you cannot be the other in a different context. This is a classic dynamic and it works for a reason. Everyone on the team should have a clearly defined role that allows them to focus on what they are the best at. I am not the best at marketing or data analysis, that's Chris. However, I am good at seeing the utility of something and teaching it to others.

The reason I bring all this up is that my conversation last week got me thinking about how to set yourself up for success. Rarely, if ever, are people successful 100% on their own. They have some kind of support system. This could be a partner, an editor, an assistant, a coach, or a whole community, to name a few. Think about a solo artist or an athlete that competes in an individual sport. They are the ones doing most of the work to perfect the skill, but they are also supported by a coach, family and friends, and other peers in their space.

Chris and I could have started our own businesses and decided not to work with each other. We each would have found success on our own. What we realized, however, is that we have complementary skill sets that make what we do that much stronger. One of our goals for this year is to focus on our strengths and rely more on one another for where we are weaker. I can speak publicly, but I am not a public speaker. I have done it a handful of times but it's not where I am needed most. Chris, on the other hand, finds his second home on the stage. It made sense for us to take me out of that space and push him into it even more. Does that mean that my role is now diminished? Absolutely not. I have a very long list of things to focus on as I grow Trust Insights.

Think about the people in your life right now. Are they all exactly like you with the exact same strengths and weaknesses? Probably not. Now think about your company, your team, your clients. Your clients hire you because you have the skills that they need. Your team functions well because everyone is good at different things. Your company thrives because there are departments focused on different parts of the business.

At our core, we tend to lean one way or the other. Are you a technologist or a translator? Are you a doer or a facilitator? Are you a coach or a team member? Neither is better, both are important.

If you're looking for your counterpart or just want more support, join our Free Slack Group, Analytics for Marketers »

***- Katie Robbert, CEO***

## January 26, 2022

## Documenting Your Processes

Over the past week, my laptop has been stuck in a 4-hour reboot cycle, I've lost the ability to use my keyboard, and my audio automatically mutes on calls.

Needless to say, technology has not been on my side this week.

My tasks have fallen behind and I've had to reach out to my team to help me get things done.

Thankfully, we've taken the time to create repeatable processes and documentation for a lot of what we do at Trust Insights. I was able to ask for help and point to a standard operating procedure for how to do the task. But it got me thinking, is that normal?

So here is the "so what?" this week - when was the last time you documented your processes?

If the answer is "never" you might be in trouble.

I hear you. I've been there, feeling like there is no consistency to what I do so I cannot possibly document it. Or I'm so busy that I cannot take the time to write down what I do.

I'm sure you already know where this is going. You have to make time for documentation and you have to find the repeatability. Why? It will allow you to do a couple of things:

### Automate

By finding the repeatability in the tasks that you perform you can find opportunities to automate some of what you do. Automation is your friend. I promise. Automating your tasks does not automate you out of a job. What it does is give you back time to do deeper thinking, build relationships, discover insights, and make plans.

### Scale

Repeatability and documentation allow you to scale. We just talked about how automation is your friend. It is not only your friend to help you get out of the trenches of doing the same thing over and over, but you can also think about scaling what you're doing. Automation of repetitive tasks will allow you to let the machines produce more. The consistency and the documentation are the instructions, the machines just need to follow the blueprint. Machines aside, it will help you significantly and save you time when you're onboarding new team members. Proper documentation of how you do things will allow a new team member to train up quickly and be productive, faster.

### Delegate

I don't know about you, but I love delegating. I especially love delegating things that I don't enjoy. Before you can delegate, you need to have instructions on how to do the task. Do you see a pattern here? Repeatability and documentation will allow you to teach someone else how to do your tasks the way that you were doing them. Doesn't that sound great?

I know that I'm probably in the minority of people who enjoy thorough documentation (or maybe I'm not - let's be friends). However, writing down the steps of what you do will save you time and aggravation when you need help from someone else. Had I not had some documentation on how tasks are complete I wouldn't have been able to ask for help when my technology failed. Well, I could ask for help but the time it would take to explain the tasks would not have helped move them forward any faster.

Do you love documentation? Do you have questions about how to find repeatability in your tasks?

Come find me in our Free Slack Group, Analytics for Marketers »

***- Katie Robbert, CEO***

**February 2, 2022**

## Marketing Checklist

I don't know about you but I live in New England where we just got slammed with a blizzard and my hands hurt from shoveling, making typing a challenge for the next few days. So I'll keep it short this week and let you get back to your regular programming.

We're one month into 2022 and for a lot of us, January acted like a cranky toddler. Knowing that we still have 11 months to go and no real sense of how they will behave, make sure you've created a monthly health check for your marketing.

It could look something like this:

- Am I meeting or exceeding my KPIs?
- What tactics are getting results?
- What tactics are not working?
- Do I know how many leads my efforts are generating?
- How do my renewal and new member numbers look?
- Am I seeing weird patterns in my website traffic?
- Have I planned to try a new marketing tactic?
- Are my channels diversified enough?
- Do I know where my audience spends their time online?

It's easy to lose track of time these days. I do it all day, every day. To counteract that I set myself a monthly calendar appointment with these and other similar questions listed as the agenda.

The goal is to stop, look around, and do a quick assessment. The worst thing we can do is not check-in. The questions listed above apply to me and my marketing. Use this as a template and adapt to cover what your marketing looks like. Maybe you have more questions about social media or email marketing. Make sure you create a list that addressed the marketing that you do.

If you're spending time every day to work out and eat well, you probably have daily, weekly, or monthly check-ins to make sure you're on track with your goals. Otherwise, what's the point? Your marketing shouldn't be any different.

Are you stuck in a time vortex?

Tell me about it in our free Slack group, Analytics for Marketers »

***- Katie Robbert, CEO***

## February 9, 2022

## Determining What Content Your Audience Wants

Chris and I talk a lot about content marketing and that all the tips and tricks don't matter if you're not writing "good quality" content.

**WHAT MAKES GOOD CONTENT????**

Wow, I didn't mean to yell but "good" is such a subjective definition. What I consider to be good is not what you might also consider good.

The basic foundation of good content is that has to be educational, engaging, or entertaining. Again, what I find educational might mean nothing to you.

I feel like I'm not getting anywhere with defining "good" content.

Oh, but wait. Yes, I am.

While "good" is subjective, it's also dependent. It depends on your audience.

There is it. Your audience will determine if your content is "good" or not. So, how do you know what they want?

I asked our Slack community how they figure out what their audience wants and here is what they had to say:

*"I go into Facebook groups where my audience hangs out and search for words around my topic. And when I have the chance to ask them directly (most groups frown upon using them for marketing research) that's even better."*

*"Go check Facebook groups to see what people are asking about. They'll tell you what they need."*

*"People lie. Behavior speaks volumes. Because of that, I like to make a wide variety of media and then see which one gets the most response. I test that over several campaigns (at relatively low effort because #contentrepurposing)."*

*"Ask them directly! Survey your audience to find out what topics and formats they like to consume."*

*"Forums are a great source of content; find out what questions people are asking and see whether they have been answered. To give you an example; I have a property client and we looked on mums forums to see what common questions were being asked and found out people were confused about what work they can do a property rentals, things like 'who's responsibility is it to fix a leaky roof?'. Then by doing some basic googling we could see that there weren't answer answers. So we wrote a blog post and viola we're in the no 1 spot for keywords around that."*

*"You should execute a buyer persona development exercise that includes research with a mix of both quantitative (like keyword data) and qualitative data with actual customer input (talk to your sales/support folks, customer interviews, surveys). The end result you're going for would be validated personas that inform your content strategy regarding the needs/wants/desires/challenges your customers face in context of your products/services. From there, you should have a clear guide on messaging, buyers journey, topic clusters, etc."*

*"I start with Search Console and/or Keyword Planner to see what keywords people are using to find the site. Then move into Google Trends to find similar topics that are popular."*

How do you figure out the content your audience wants? [Tell me about it in our free Slack group, Analytics for Marketers »]

***- Katie Robbert, CEO***

## February 16, 2022

## Why I Love RFPs

I don't know about you, but I love the RFP process. In this context (in case we're not on the same page) an RFP is a Request For Proposal. A company will send out an RFP when they are looking to bring on an agency to do some specific work for them.

But you knew all that, smartie pants.

If you know me, then you'll know that it's weird for me to say that I love the RFP process. I've been through it dozens of times in different jobs and roles.

You're probably thinking to yourself, "the RFP process is long and painful" and I'm not going to disagree with you. It absolutely can be. It can feel like a waste of resources, especially when the RFP is vague. Your odds of getting selected are low and in the end, you're frustrated and feeling rejected.

So, why do I love RFPs?

### It highlights room for improvement

We get so busy with our nose to the grindstone that we can forget to check in with the other members of our team. Responding to an RFP gives you an opportunity to see what other people and departments are working on, and where they may need more support. You may see an RFP request and feel like your company meets all the requirements but when you dig in deeper you realize that there are more skills needed. See this as a positive thing. You can now build a professional development roadmap and set goals for your teams.

### It fosters communication

I remember one time, in a previous life, that my team was flown across the country on the client's dime, for the excuse to get different departments in the same room to talk to each other. That still feels like an insane use of my team's time, but that's what they needed. Again, we get so busy that we may check in on surface-level items and high-priority issues, but do we really dive into what's going on with other teams? I've often found that this part of the process allows teams to start breaking down silos and start building more collaborative processes. Responding to an RFP gives you an excuse to get together with other teams and resources that you may not otherwise have a chance to talk to.

### It allows you to recognize your accomplishments

Ok, so responding to an RFP isn't all bad. Most will ask for case studies of programs that you've done, demonstrating why you're a good fit and that you're capable. I don't know about you, but writing case studies feels like a chore even though it's supposed to be positive praise for the work you've done. Look at it as an opportunity to toot your own horn a bit. You might be pleasantly surprised at all you've accomplished.

You can get dragged down but the RFP process or you can choose to see all the positive things it will do for your company - even if you don't win the business. You'll get them next time! Focus on what you've learned and commit to applying those lessons moving forward.

How do you feel about the RFP process?

Tell me about it in our free Slack group, Analytics for Marketers »

***- Katie Robbert, CEO***

## February 23, 2022

## Won't Somebody Think of the People?!

This week, we're talking about the unsung heroes of Marketing and Data Science. The people! We cover it from the perspective of data analytics on the podcast and talk about who needs to execute your marketing on the Livestream.

We spend so much time on the strategy, the tools, and the outcomes that we tend to forget that we need people to do all of these things. Chris asked me one time, why is that? I didn't have a great answer (and still don't) but it's something I constantly think about now.

I started to think through the standard frameworks that I use, like the Software Development Lifecycle (SDLC), the AI Framework, or the Data Hierarchy. Even thinking about other frameworks like STEM, SWOT, Porter's 5 Forces, or 4Ps of Marketing - none of these mentions the people who need to do the work, or the skillsets required.

While I can't say why we forget to factor in people, I can talk through some tips on how to do better.

### Don't plan in a vacuum

This might be the best piece of advice I can give you for pretty much anything. Don't plan in a vacuum. This means, involving more than just your out-of-touch executives in the planning process. Often, companies bring the highest-paid C-Suite people in to create a strategy without thinking about who actually needs to do the work. If you changed how you create a plan and involve the people you think will need to do the work you may be surprised at what you find out. You could learn that your team has deeper and more advanced skills than you were aware of. Conversely, you may learn that your team is stretched so thin that asking them to do one more thing could create a mass exodus. Involve your people. Engage them. Give them some ownership over what is being asked.

### User stories

On one hand, thinking about the people who need to execute the plan is important. The other side of the is the people who need to make a decision with the information. They could be one in the same or perhaps they never interact at all. The best way to think about this situation is with user stories. Yes, I talk about these a lot. The reason is that they are incredibly useful when thinking through who cares about the plan, the project, the outcome. I would challenge you to dig deep and think through every single person internally and externally to your organization that might care about your plan. This exercise will give you really strong insight into the direction you need to take.

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

### 5P Framework

When in doubt of where to start, use the Trust Insights 5P Framework. The 5Ps are Purpose, People, Process, Platform, Performance. At a high level, you're factoring in the people involved in the project. It's an opportunity to determine if you have the right resources or if you need to start posting for new positions.

The bottom line is that all the tech, processes, platforms, algorithms, and gadgets won't matter if you don't have the people to operate them and make decisions. Put your people front and center when you're making plans and creating strategies for your organization.

How do you factor in people?

Tell me about it in our free Slack group, Analytics for Marketers »

***- Katie Robbert, CEO***

## March 2, 2022

## How Can I Help Ukraine?

I don't know about you, but I find myself trying to breathe more deeply these days every time I open a social platform, check my email, or catch the news.

With that, we're skipping the usual newsletter this week. No sales pitches, no data. We're all still working, still creating, still producing. But if you're like me then your focus is likely elsewhere, as are your immediate priorities.

I won't recap everything that has happened in the world in the past week - you didn't come here for that. What I will do is offer some resources that you might find useful right now.

This is borrowed from Chris' personal newsletter:

If you want to help Ukraine militarily, the National Bank of Ukraine has a special fund set up. Instructions for donations are here; the bank has streamlined the process and you can now use any credit or debit card along with Google Pay. Currency conversion is also automatically handled for you.

If you want to help Ukraine non-militarily, the Red Cross and Red Crescent of Ukraine is in urgent need of donations for helping the injured.

Building on what Chris has listed, here are some resources that I have chosen to support:

World Central Kitchen - WCK is first to the frontlines, providing meals in response to humanitarian, climate, and community crises. We build resilient food systems with locally-led solutions.

"*Wherever there's a fight so that hungry people may eat … we'll be there.*" - Chef José Andrés

For those wanting to know how to help people that are fleeing Ukraine with pets, here is a round-up of helpful resources that have been vetted by the

International Foundation of Animal Welfare.

Lithuania's Director of State Food and Veterinary Service, Mantas Staškevičius, said, "*We cannot be unconcerned about the people running from this horrible situation. Many Ukrainians will be traveling with their beloved pets, so we will help to find them the safest shelter.*"

If donating or volunteering is not within your capacity, that's ok. We're still working through a pandemic and have stretched ourselves thin. Instead, reach out to your network and share these resources so that others have access to them. Additionally, you can offer a shoulder to cry on, encourage empathy, and be kind.

We'll return to our usual newsletter next week. Until then, take care of yourself and others.

***- Katie Robbert, CEO***

## March 9, 2022

## Online Training Courses

In case you weren't aware, we ask a one-question survey each quarter. On that day, we get to hear from you and learn about your world. We get to hear firsthand what's going on with you. It's one of my favorite things that we do.

[You can take the survey here]

This quarter, we're curious about what kind of training you need this year. We were inspired by the recent [CMO Survey] that came out in February. It stated that:

- 59.2% prefer to hire and train their new marketers in-house
- 15.7% prefer to partner with other marketing agencies to learn new skills
- 12% prefer to partner with other consultancies to learn new skills
- 11.9% prefer to partner with other companies to learn new skills
- 1.3% prefer to buy other companies to learn new skills

It's interesting to me that companies are moving toward hiring and training internally. I know from my own personal experience that lack of professional development and growth is a big reason for employee turnover.

So I ask you - what is it that you want to learn and be trained on this year?

Trust Insights is working on launching training courses covering Google Analytics, Data Analytics, Search Console, and more. Stay tuned for that. If you can't wait - scroll down the newsletter to the "Free Training Classes" section to see what we have on-demand so far. [You can also find a full list of videos on our site here.]

In the meantime, here are some resources that might help you on your quest for knowledge:

[Google Analytics Academy]

Analytics Academy helps you learn about Google's measurement tools so that you can grow your business through intelligent data collection and analysis. You can take courses by level: Beginner, Advanced, and Power Users. You can also take a course that will teach you the basics of Google Tag Manager and Data Studio.

PESO Model Certification

The PESO Model Certificate is for communicators who want to gain advanced skills and a comprehensive understanding of how to build and scale an integrated program within any sized organization. The PESO model certification is powered in partnership with the Newhouse School at Syracuse University, otherwise known as one of the top communications institutions in the world.

AI Academy For Marketers

AI Academy for Marketers is an online education platform that helps you understand, pilot and scale artificial intelligence.

Use one of the following codes:

- TRUST25 – Saves 25% off any Academy purchase
- ROBBERT100 – Saves $100 off any Academy purchase

Ikonos Align AI Academy

Learn the missing skill-sets needed to accelerate AI adoption in your organization. There are four tracks with multiple courses to help accelerate the AI Transformation in your organization

MarketingProfs Training Courses

Our courses train you in the specific skills you need for success. Strategy. Campaign planning. Asset creation. Communication and distribution. Analysis and optimization. And how to manage it all. Each course is tailored to the type of campaign you're working on. No fluff. Just exactly what you need to achieve the result you deserve.

What courses are you taking this year?

Let me know in our free Slack group, Analytics for Marketers »

***- Katie Robbert, CEO***

## March 16, 2022

## Trust Insights Turns 4!

Believe it or not, Trust Insights is now 4 years old! It feels like we've been doing this forever, while at the same time just starting. Every year we try to stop and reflect on how far we've come. Because we love our community, we decided to ask you if there were any questions you'd like answered about being business owners. This is what you wanted to know:

**Todd: How did you know it was time to go out on your own?**

CP: A cliche I believe strongly in is that change happens when the pain of change is less than the pain of staying the same. The company I was working at had lost its way; the culture and the reasons I joined it in 2012 were lost in its acquisition. It was headed towards a place I didn't want to be, rapidly. That coupled with a lack of time for me to focus on the area of study I wanted to focus on - data science and machine learning - meant that it was time to go. The risk - starting a venture and having it not succeed - was well worth the tradeoff of doing something for 12 hours a day that I hated doing.

KR: Like many things, there is never the "perfect" time - at least in my experience. I knew I needed a change when my professional goals no longer aligned with the work that I was doing or who I was doing it for. I wanted to move up, take on more responsibility. At every turn, I was told "no". That, coupled with the general dissatisfaction of the value that I felt I was bringing led me to be ready to go out on my own. I worked for other companies for 20+ years and I was ready to be the rule maker. The real push was when putting together a business plan wasn't a difficult task. I knew all the moving pieces, I knew who the customers would be, I knew what we would sell. It just clicked.

**Matt: Curious how much time you spend pursuing new business, vs creating content/working on client project work? Do you find it tough to balance?**

CP: It flexes. Part of my role is to make new stuff, to come up with things that don't exist and bring them into existence in a half-assed fashion, MVP sort of stuff. Then with Katie and John, we refine, polish, and improve until we have something the world is ready to see - and even then, it's always a work in progress. Most of my work is client-facing, but the wonderful thing about owning your own business is that you get to decide who the clients are. That means we have the freedom to choose clients who have interesting work, interesting problems to solve so even when I'm doing client work, I'm still helping to build the business in some way. Just last week, Katie and I had an idea on a client call that will eventually be brought into existence.

KR: In my role, creating content is part of pursuing new business. I use the time to (hopefully) create content that helps our audience not only understand what we do but help them to see themselves in the problems and solutions. It's always a tough balance because client work feels like it should be prioritized above everything else. The goal is to treat your own business as a client so that it gets prioritized higher - which is way easier said than done. The company always gets pushed to the bottom of the list until you're large enough to have dedicated resources - which we aren't. Yet.

**Todd: Do you still have to fill out timecards?**

CP: No. One of the first things we decided on was that we would be a value-based business, not a time-based one. Timecards are indicative of a time-based business, and those scale much less well than a value-based business. Our work is such that if we deliver value, we are compensated for the value we create for you - regardless of how long it takes.

KR: No. I'll never say never - but hopefully never again.

**Ashley: How far are you willing to go to win the business? I find so often that agencies will practically hand over everything strategic before a contract is signed.**

CP: One of my favorite quotes by Jay Baer is "Having the recipe does not make you a chef". In the work we do, I could tell you exactly what I do and how I do it, and most of the time, people don't want to follow the recipe. For example, figuring out how to calculate the lift of a public relations campaign is a matter of consolidating and normalizing your data, then you center and scale it, make sure it's stationary, remove anomalies, then create a test period and run a propensity score model on it to measure median uplift attributed to the campaign. That's the recipe. How many people want to cook that? When it comes to winning business, we tell people what we're going to do and what the expected outcomes are, and we let them decide whether they want to cook for themselves or have us cook for them. The advantage of being truly data-driven is that you can't "hand over everything strategic" because you haven't worked with the data yet - so if the client is truly committed to being data-driven, they would have to analyze the data themselves and since they haven't done that, there's nothing for us to hand over.

KR: Having worked in a traditional agency, I understand the hoops that you're asked to jump through for the new business process. One of the things we decided with Trust Insights is that as much as we could avoid it, we wouldn't jump. We're very transparent with our prospects about what we do and how we do it. Fortunately, so far, that seems to be enough. They come to us because they don't know how to execute the plan we've outlined, or don't have the time.

**Ashley: How do you deal with tough clients who need training on the topic at hand but may not think they do?**

CP: As best as we can, we avoid taking on "tough clients". In the grand scheme of things, there are four types of clients: people who know what they know, people who know what they don't know, people who don't know what they know, and people who don't know what they don't know (but think they do). The first three types of people we can work with. The last category we usually weed out before taking them on as a client because their Dunning-Kruger syndrome leads them to believe they don't need us anyway. Then we wait six months for that point of contact to quit or be fired, because that's nearly inevitable with someone like that.

KR: I find it less effective to tell people what they don't know, but help them come to that conclusion. For example, I'll give the client the opportunity to sit in the driver's seat to be the teacher to demonstrate to me what they feel they know. This often leads to a conversation to "well, I guess I don't know how this work" or "I wasn't aware that there was more to learn". This is a skill I've been working on for a long time and is obviously helpful in this company now. It's an exercise in patience. People have to be aware that they need help and then also want the help.

**Tristan: Do you track your own marketing or rate yourselves on the achievements for clients?**

CP: We track our own marketing. When we do work for our clients, very often it's behind the scenes, like fixing up their analytics infrastructure or helping them build models. It's not stuff that's publicly visible for the most part, so it's not something we benchmark on. It's kind of like a doctor - doctors market on fixing what's wrong, and a campaign of "all these people are healthy" isn't super compelling.

KR: I track everything. I think this is partly because I hate surprises and partly because in previous jobs I'd been shut out of seeing the metrics. We use the company as our sandbox for everything we do. We always test our tools and services on ourselves to demonstrate effectiveness first. That helps us clearly articulate the value of each service to our clients and exactly what to expect. So Trust Insights is the research and development of products end-to-end before anything hits the market. From there, we use our own R&D and client work to create case studies for the work we do. So it always starts with us. If we can't consistently and successfully do it for ourselves and get results, we can't claim we can do it for anyone else. It's hard because it requires a lot of discipline to keep the company marketing a priority.

**Sharon: What are your goals for the next 4 years (and how did you establish them)?**

CP: To survive. And I mean that in all seriousness. In the four years we've been in business, two of them have been in a global pandemic and now massive global instability due to Russian invasion. Every day is a new adventure, and there's literally no telling what's around the corner. I'd like us to start releasing software at some point in addition to services, because software as a driver of revenue scales faster and better. Eventually, I'd like for our bench of clients AND our intellectual property - both content and code - to merit an 8 or 9 figure sale down the road. In four years would be great.

KR: To have a multimillion-dollar agency with a 40% profit margin that sells, allowing me to retire into the woods and rescue dogs.

In all seriousness and numbers aside, over the next four years I'd like to see us have less projects and more retainers. To establish our year over year goals, I think about the overall outcome we want to achieve and work backward from there. I'd like us to have more brand awareness. I'd like us to have more passive income to supplement the client work. I'd like to see us have clients that let us dive deeper into exploratory data analysis for them but I'd also like to see predictable services that are checklists and straightforward to execute. We're on track for all of these things. I'm a fan of consistent, sustainable growth. This has allowed me to keep complete control of every aspect. I know that won't be the case forever, or even by the end of this year, but for now I'll enjoy it.

Over the next year you can expect more courses, content, and innovative ways to examine data. Thanks for all of your support!

Got questions you want answered? Let me know in our free Slack community, Analytics for Marketers »

***- Katie Robbert, CEO***

## March 23, 2022

## News About Google Analytics

In case you missed it, Google announced last week that it will be sunsetting Google Analytics Universal (or Google Analytics 3) in July of 2023. The data that you've collected will only be available to you for six months after that.

Why? Google rolled out Google Analytics 4 last year and is now making a push for everyone to start adopting the new data collection platform.

[You can read Chris' post here/]

When Google made its announcement, they missed a massive piece of the puzzle - the people. Who is going to do this migration? Who needs to be skilled up?

We know from our clients and community that resources to operate Google Analytics 3 is tough, and there are abundant training resources for that version.

When it comes to Google Analytics 4 there aren't as many clear-cut training resources available. There are also a lot of features that are missing from Google Analytics 4.

So, what can you do to get ready?

First of all, breathe. I know that I'm not the most technical person and if I didn't have someone like Chris on my team I'd be panicking. Google Analytics 4 is MUCH more technical and less intuitive than Google Analytics 3. The goal setup is different, you cannot modify the channel groupings, the menu is mislabeled. Almost nothing is the same between the two systems so it can feel like learning a new language. If you need to have a mini panic attack, go ahead and do it. Get it out of the way.

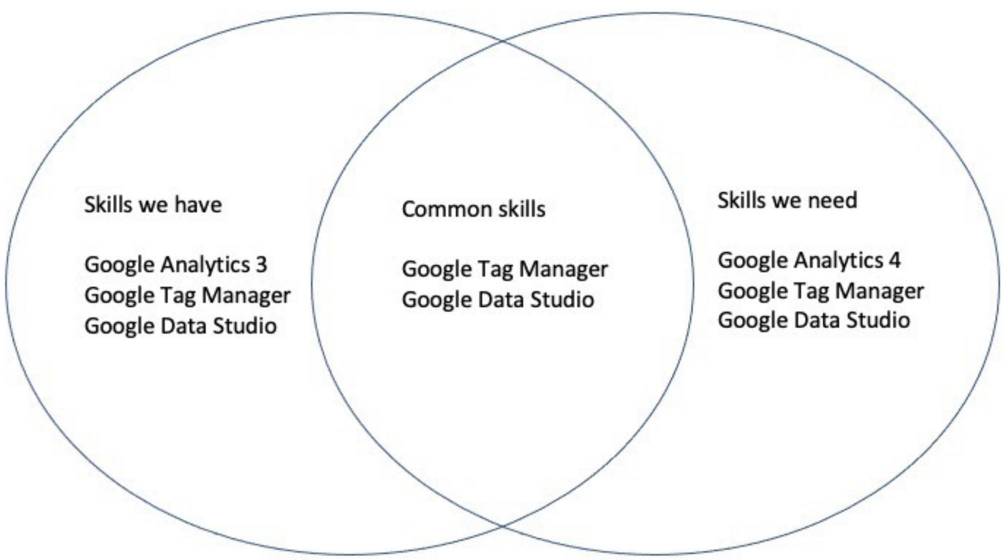
Ok, now that we're all breathing normally, let's get through this together.

### Start with a skills gap assessment

It's time to take stock of your skills and your team's skills. If you haven't already, you may need to nominate someone on your team to get trained. Think of a skills gap assessment like a Venn diagram. On one side you have the current state. These are the skill sets you currently have on your team. On the other side, you have the future state, the skills you need to complete the task. In this case, it's migrating to Google Analytics 4. In the middle of the diagram is what you currently have in common on both sides. What's left in the future state is where you focus your training efforts.

For example, if your team is comfortable in Google Analytics 3, Google Tag Manager, and Google Data Studio, you're in good shape. This is your current state. The future state for setting up Google Analytics 4 includes Google Tag Manager and Google Data Studio. This means you can focus solely on the new interface and controls in Google Analytics 4.

It could look something like this:




GA Venn Diagram

I don't know about you, but this feels a little less overwhelming now. We've determined that we already have a lot of the skills needed to migrate from

Google Analytics 3 to Google Analytics 4. This is good news!

Once you know who needs to be skilled up, it's time to find some resources. As mentioned earlier they are still pretty sparse and there is nothing official from Google themselves.

I'd recommend starting with our list of YouTube videos, more being added all the time.

If you're looking for additional support, this is a service that we - Trust Insights - offer. You can find out more here.

Let me know how you're handling the news in our free Slack community, Analytics for Marketers »

***- Katie Robbert, CEO***

## March 30, 2022

## Getting More Out of Google Search Console

With everyone talking about the recent Google announcement, there has been a lot of discussion about moving from Universal Analytics to Google Analytics 4.

You know what's not being talked about enough? All the other systems that GA4 will touch and what it means if you don't get set up correctly from the start.

In all honesty, you're not migrating from Universal Analytics to GA4, you're setting up a whole new system with all new data. This isn't the post to get into the weeds, but your UA and GA4 data are not 1-to-1 and you're not migrating your data from one system to the other.

If you want more information on that, this post will help.

What is not being talked about? **Google Search Console**.

If you've taken a tour around the new Google Analytics 4 interface you know that it is not user-friendly. You may have also noticed that unlike Universal Analytics, you cannot do any kind of reporting within GA4 itself. So where does that leave you and your marketing planning? The anchor of most of your planning should be content. Without content, you have nothing to share and promote. With the changes to Google Analytics, let's walk through what else you need to set yourself up for success.

You'll want to make sure Google Search Console is integrated into GA4 (and Universal Analytics for that matter). Why? Google Search Console is the unsung hero of your content marketing. Many use Google Analytics to see which pages are getting the most traffic but this data won't tell you what the gaps in your content are. Let's take it a step further.

While third-party SEO tools are fantastic and you should be using them, they focus a lot on what's going on broadly and what your competitors are up to.

This data is important for staying relevant in your space. What's missing? The data from your own website to understand your audience's intentions.

Let's say for example you've been using a third-party SEO tool to find out that all your competitors are competing for the term "chocolate cream pie". Naturally, you're thinking that you also need to create content to stay competitive. However, when you check your data in Search Console you see that people are coming to your site based on the term "lemon squares". Google Search Console is the system that tells you the intent of your audience, what they care about.

In this example, what you think you should be ranking for and what you are actually ranking for are two different things. Your audience is telling you that they come to you for fruit-based desserts, not chocolate ones. This, then, presents you with some options. You can continue to fight with your competitors for terms around "chocolate" or you can test more content related to "lemon".

If you are only using Google Analytics data for your marketing planning and not also using Search Console you're missing out on rich data that will give you insight into what your audience wants.

If you want to learn more about how to use Google Search Console for your planning purposes take our new course - and as an INBOX INSIGHTS subscriber, use discount code INBOXINSIGHTS at checkout for $50 off. You can find it here.

How are you using Search Console? Let me know in our Free Slack Group Analytics for Marketers

***- Katie Robbert, CEO***

Are you looking to get up to speed with Google Analytics 4? Look no further than the Trust Insights Google Analytics 4 For Marketers Course! This comprehensive training solution is designed for marketers specifically, with more than 5 hours of content across 17 lessons, plus templates, spreadsheets, transcripts, and certificates of completion.


With this course, you'll learn how Google Tag Manager and Google Data Studio form the essential companion pieces to Google Analytics 4, how to use them all together, how to determine if a migration was done correctly, and how to rearrange Google Analytics 4's menus to be more sensible. So don't hesitate - master Google Analytics 4 in ways no other course can teach you with the Trust Insights Google Analytics 4 For Marketers Course today!

👉 **Click/tap here to enroll today »**

Or visit **https://www.trustinsights.ai/ga4course**

## April 6, 2022

## The Unaware Audience

"How do I get more leads?" is usually the first question we hear from prospects and clients. It's a great question to start with, but it's not the only question you should be asking.

If you're in the B2B segment, you know that it functions differently from B2C efforts. There is a lot more education that needs to happen before you can go straight to "I want to buy this now" - especially if you run a services agency.

The piece that we're missing, me included, is reaching the unaware segment of our audience before they can become leads. We've been pouring over our own monthly reporting, trying to figure out what we're missing. What we're missing is a lot of activity at the top of our funnel.

Trust Insights is really good at helping people solve problems when those problems are known. We are not so great at attracting an audience of people who only have symptoms and are unaware of the actual problem.

Gini Dietrich gave me this clear cut example of what I was trying to articulate about the unaware audience:

*"I actually just heard a commercial in the car this morning that was interesting. It's for an ear, nose, and throat doctor. They talk about how if something is going on, you call your primary doc then they refer to you an allergist who does a bunch of tests only to figure out you don't have allergies so you go back to your primary doc who suggests more doctors and more tests. But with this place, you have a stuffy nose or an earache so you go to them and they figure out the root cause on your first visit."*

In this example, Trust Insights is the ENT, and we want people to come directly to us, even if they just have a stuffy nose. Why? Because we're specialists. We know that a stuffy nose is part of the story and we have a whole set of questions to ask that will narrow down the diagnosis and get to the root issue.

When we take that example and start to translate it to marketing, a stuffy nose becomes a data point that doesn't look right. A sinus headache becomes missing data. And so on.

This brings me back to the point, you need to be able to educate the unaware audience on the symptoms so that they will come to you for help, aka, "How do I get more leads?"

In the latest CMO Survey, we know that customer want superior product quality, excellent service, and a trusting relationship:


CMO Survey

Start with education. This is through your blog and other content. This content should introduce who you are, what you do, and your expertise. We ALL jump too quickly to wanting people to buy from us so we skip over the awareness stage. Without awareness, people won't buy. Couple that with an attribution report and you'll know which channels to publish your awareness content on.

Don't skip over the relationship-building phase and assume it will come once a contract is in place. So, my advice to you (and me) is to spend more time getting to know your audience. Don't go in with the hard sell. Really listen to what they are saying, the questions they are asking, and help them put the pieces together for themselves. The leads will come. They will be the people that you helped understand their symptoms. The people that trust you to provide the answers.

How do you reach the unaware audience? Let me know in our Free Slack Group Analytics for Marketers »

***- Katie Robbert, CEO***

## April 13, 2022

## Don't Be Afraid to Spoil the Ending

I am going to give away the ending of this post. You need to reach the right audience. The right audience won't run away if they know how the story ends. Give them a compelling conclusion and they will stick around to read the rest of the narrative.

I love reading. I read a lot, sometimes three different books at a time. I mostly read thrillers and murder mysteries where stating the ending at the beginning ruins the whole story. Until it doesn't. I recently started reading a book where the author gave everything away in the first chapter but it was such a twist that I couldn't wait to dive into the rest of the book to see how it all happened.

Why don't we apply these same rules to our marketing content? Why are we so worried about putting the ending first?

When I read for pleasure, I can take my time and be pickier. I recently just started reading a thrilled that started with the ending. It was such a weird twist that I couldn't wait to dive in and find out how they got to that point. When I read for business and professional development I'm trying to consume as much relevant material as possible. Herein lies the issue that I run into - a lot of the content I need to be reading is dense, technical, and complicated. My eyes start to swim and my brain feels like it's flip-flopping. The best I can do is a cursory skim of the material. But I don't get much out of that. The next thing I do is start at the end and work my way backward.

What? You read articles backward?

Yes, yes I do. I've done this since I was a kid. I don't read the sentences themselves backward, just the paragraphs. I've found that by reading the conclusion first and then each paragraph that comes before tells a more cohesive story and helps me comprehend what the author is communicating.

Think back to when you were taught how to write in elementary school. Start with your hypothesis or argument, use the next three paragraphs to reinforce your point, and then state your conclusion. Using that structure, your point is the first and last thing you talk about. This structure gives the reader the information they need to decide if they want to keep reading. Back to my original point - if your conclusion is compelling, people will want to read the whole story.

An excellent example of not starting with the ending is online recipes. Who among us hasn't searched for a simple recipe, only to be met with an 800-word essay on how it had been passed down from their brother's mother's sister's grandmother's Nona's housekeeper, and every time they drive past a field of tulips they are reminded of the way the sun shone through the window at 6 am on a Tuesday morning...you get the idea. The reader wants the recipe. Give them the recipe. Then give them the back story. Don't worry, when you reach the right audience they will want to read the whole thing.

At this stage, you're wondering, "If I state the conclusion upfront will people bother reading the rest of the article?" Yes. If your readers know what they will get out of the content and it suits their needs, they will stick around for the rest of the story. Earlier, I was talking about how I like to read thrillers and mysteries. There are a fair number of stories that start with the ending. It's a risk, but I'm the right audience. It's my favorite genre and I'm always looking for new twists and turns. Your content should do the same.

So, don't be afraid to give away the ending. Your audience will want to know how you arrived at that conclusion and stick around for the rest. You'll also be doing people like me a huge solid by helping me understand what you want to communicate faster and I will stick around for your whole story too.

Want to spoil the ending for me? Tell me in our Free Slack Group Analytics for Marketers »

***- Katie Robbert, CEO***

## April 20, 2022

## Setting Up Basic Data Governance

Whenever I start to say "governance" to one of my clients I can see the involuntary shudder start to happen. It's a word that people tend to dread. It has a lot of negative connotations such as slow-moving, daunting, lots of paperwork, overhead, delays, extra work, extra cost, and endless meetings. The list of reasons not to do it goes on and on. True, data governance can mean all those things if not approached thoughtfully. Not all data governance plans are the same and there is no "one size fits all". Every company will have different needs. Conversely, having strong data governance can speed up your processes, make you agile, and allow you to quickly answer questions. So let's get into the good parts of data governance, shall we?

Governance, in this context, is just another way of getting organized. I love organizing. It gives me a sense of accomplishment. I can find things easily, and direct others to items even if I'm not looking at them. A good example of this is folder governance. Even though we're a small company, the folders that we have in our online system can get unwieldy, making it hard to find a contract or a deliverable. By setting up governance for which folders should exist and what materials belong in each, we have a better chance of finding what we need without too much effort.

It took me a long time to get an organized mindset, and I fail at it some days. When I was a teenager I was the walking definition of chaotic. I never knew where anything was, my homework was forever incomplete, and I was late for everything. As I got older I started to see the consequences of this and would take small steps to get more organized. Again, it wasn't overnight, and not everything I tried worked.

When I think about all the projects I want to tackle around my house it can feel overwhelming. To feel like I'm making headway, I try to start with one project that isn't overly time-consuming and that I know I can complete. This is how I recommend you start thinking about your data governance. Not all at once, but in manageable pieces.

When we talk about data governance we're talking about a few basic things:

What is it? Who owns it? and How is it managed? You can go much deeper with your governance but for most marketing organizations that is a good enough start.

Start with one piece, like ownership and access and document that. The questions you want to answer are:

- Who owns the software or database that collects the data?
- Who can access the data that is collected in the software or database?
- What levels of access does each person have (read-only, editor, admin)?
- Do all the people who have access have the correct level of access?
- Are there people who should be removed from having access?
- When was the last time passwords were changed?

Depending on the size of your organization, this could be a small or large list of people. If you work with outside agencies, the list may get even longer. However, don't let that deter you. Most software has a user portal built in that will tell you this information. You may also need to ask around to other team members to confirm. Knowing who can access and edit your data is a good first step.

Once you know who, you need to know what. Meaning, what data is being collected. This will vary depending on the system or database you have set up. A system like Google Analytics will collect data about the actions happening on your website, whereas a CRM system will collect data about your customers themselves. If you're using more than one system in your tech stack (and most of us are) you can start with a simple spreadsheet that lists the basic data points from each system. It might look something like this:

- System - data collected
- Google Analytics - website visits, pages visited, forms filled
- Hubspot - contact name, contact email, contact company

This is oversimplified but you get the idea. The goal is to have an understanding of what data lives in what systems.

Lastly, you want to answer the question of how. How is this data managed? A lot of systems will have you believe that they are "set-it-and-forget-it" but that is simply not the case. You should, at a minimum, review the setup of your system annually. As your business goals change, the data that you collect to support those goals will also change. As your teams change, who has access will change. This is a great time to update your governance documents.

Data governance doesn't need to be an arduous effort of endless meetings that don't result in anything. It should be an activity that allows you to get to what you need because you know where everything is and who to ask.

Have questions about how to get your data governance project started? Come find me in me in our Free Slack Group Analytics for Marketers »

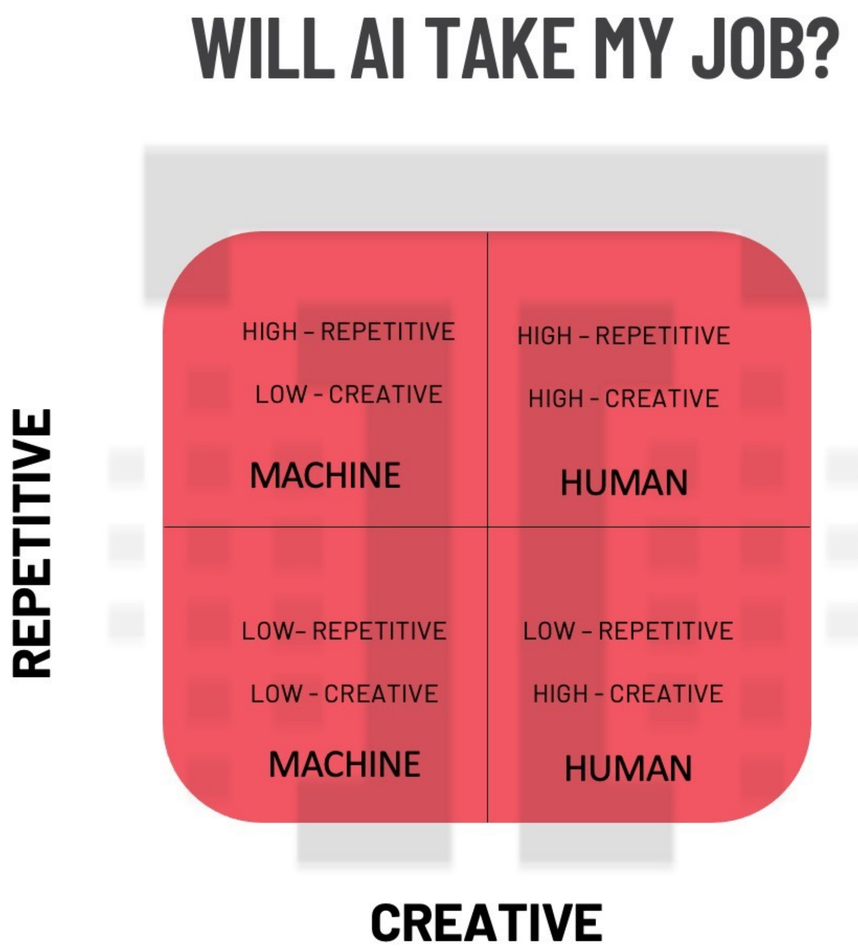
***- Katie Robbert, CEO***

## April 27, 2022

## How to Know if AI Will Take Your Job

This is a common question with a variety of answers. To help simplify, I've created a 2x2 matrix to categorize the work that you do so you. This way you can better determine if you should worry about what AI can do.

Tada! The Trust Insights "Will AI take my job?" matrix!




Will AI Take My Job

Ok, the name needs work. That's not important right now.

To plot your tasks and understand if AI can do it versus a human, here is how you read the matrix. In the top-left quadrant, you have tasks that are highly repetitive and low on creative thinking. Those are the tasks that AI will be able to do and honestly, you should be happy to part with them. In the bottom-left quadrant are the tasks that are not repetitive but also not creative. AI will be able to handle these tasks as well, with some programming for the variations. In the top-right quadrant are your tasks that are highly repetitive but also highly creative. The more creative thinking that you need, the more that AI will struggle to replicate it, even if it's repetitive. The bottom-right quadrant is where you hope a lot of your tasks will fall if you're concerned. These are the less repetitive and highly creative tasks. These are the tasks that are most safe from AI.

Here is how you use this matrix to examine your own work. First, write down all the things you're responsible for. This can be as simple as "check the dashboard for data anomalies" or as complex as "create a strategic plan for marketing". For this exercise, start with one week's worth of tasks.

My list might look something like this:

- Project manage weekly client deliverables
- Record Podcast
- Write newsletter open
- Update editorial calendar for next week
- Update marketing tracking sheet
- Interview manager candidates
- Write a sales pitch email
- Create a 2x2 matrix for newsletter post

My next step is to plot these tasks on the "Will AI take my job?" matrix. You can label each task as "High" and "Low" for Repeatability and Creativity. The next version of my list looks like this:

**High - Repetitive / Low - Creative**

- Update marketing tracking sheet

**Low - Repetitive / Low - Creative**

- Project manager weekly client deliverables

**High - Repetitive / High - Creative**

- Update editorial calendar for next week
- Record Podcast
- Write newsletter open
- Write a sales pitch email

**Low - Repetitive / High - Creative**

- Create a 2x2 matrix for the newsletter
- Interview manager candidates

When I look at my to-do list this way I can breathe easily. My job is safe from AI this week. There are a few tasks that AI could do, but most of the items need human intervention and creative thinking. Could I have AI write the newsletter? Sure. If I didn't care too much about the quality. The same is true of a sales pitch. AI can write that for me, but it won't necessarily be my tone, my humor. These are choices you can make about your own work and what you feel is best for your work output.

The next time you're wondering if your job is safe from AI, or if there is an opportunity to introduce AI into your job, use this matrix to see where your tasks fall. You may be grateful to give up some items on your list so that you can refocus your energy on bigger value items.

Do you have questions about what tasks AI can do?

Come find me in me in our Free Slack Group Analytics for Marketers »

***- Katie Robbert, CEO***

## May 4, 2022

I had planned on writing about good and bad leaders this week. Actually, I have the post written and ready to go.

However, my gut was telling me that given everything going on, recent news about leaked drafts from SCOTUS, states making it illegal to be exactly who you are, wars that make us feel helpless…and on and on…it wasn't going to hit the mark. It may even come across as tone-deaf. So I'm pausing for this week, taking a step back, and making sure I'm reading the room.

If you scroll down, Chris is covering Twitter data in the Data Diaries this week. I was asking him if he also felt that I should pause and take a breath this week. He looked into his data and the analysis validates my gut feeling that many of you are preoccupied with non-marketing topics.

So, with that, I want to give you space to focus your energy where it needs to be.

If you need the distraction, keep reading!

If you don't, I'll see you next week. Take care of yourself.

### When to Stop Talking and Listen to Your Audience

I remember a few jobs ago we used to joke that one of the key stakeholders was an N of 1. Meaning that despite what anyone else wanted, whatever he wanted was what we had to do with our products. We begged and pleaded to talk to our audience, even went so far as to put together a plan to activate the audience with a Voice of the Customer initiative. What we got instead was a fruitless and expensive dinner for an elite group of prospects that had no intention of working with us. It was a waste of time and money, and we never really got to the bottom of what our customers wanted from us.

So what is the lesson here? If you aren't listening to your audience, how the heck do you know what they want from you? You're making assumptions and guesses. Gut feelings are a good starting place but they aren't enough. You should be validating your instincts with data. Creating the wrong experience that no one asked for is not the way to be successful.

Believe it or not, there are a lot of different places where you can gather customer data. If you have a chatbot or support system you can mine those databases for sentiment and solvable problems. If you are on social media, there are social listening tools that can help you understand the conversations being had. If you run a community, well, you'll know firsthand what people are talking about.

My friend Brooke Sellas is about to release a book all about this. Actually, she and I are going to be hosting a free webinar on May 24th, talking about Customer Care through the Customer Journey, and you'll get excerpts from her book along the way.

In the webinar, we'll be walking through each phase of the digital customer journey and sharing advice on how to really understand what your audience needs at that time.

You can register for the webinar here »

The short and sweet point this week is to stop and listen. Listen to what your audience is saying and what they care about. It may tell you that it's time to pause because they can't focus on you right now.

Need a distraction from reality?

Come find me in me in our Free Slack Group Analytics for Marketers »

***- Katie Robbert, CEO***

## May 11, 2022

## Transmedia Storytelling

All too often when working with clients I see the same issue over and over. The marketing strategy is focused on individual digital channels, and not the story they want to tell. When you focus on the digital channels first they tend to become siloed and not complimentary.

Chris explores this further in today's Data Diaries (below) but when looking at the data to see what marketers consider to be the most important digital channels, we see the same three over and over: social media, email marketing, and content marketing.

There are a lot of missed opportunities when you narrow your focus to a few digital channels.

When thinking about your marketing strategy, stop thinking about what channels you can use, but rather, what is your story? Why? Because then you can weave a cohesive narrative across channels. This is **Transmedia Storytelling**.

Transmedia Storytelling is telling the same story across multiple digital platforms. You know who does this well? The entertainment industry. When a movie is about to be released you start to see it crop up everywhere you go online. The marketing departments are thinking beyond posting "hey this movie is coming got watch it". They are thinking about how people interact on different platforms and how to adapt the story. On social media platforms, they might find fans to discuss plots, characters, easter eggs, and conspiracies. Through email, they might include exclusive behind-the-scenes photos that you can only get from the VIP newsletter. They could create an app that allows users to play games related to the movie. Then, you've enabled the fan base to start sharing the stories on their own sites and other platforms - and the reach of the movie keeps going and going.

You get the idea. This isn't a new concept. So why are we doing such a poor job of this? Because we tend to think channel first, story second. You need to reverse your thinking.

### Story First

What is the story you want to tell? Is it about your company? Your products? What is the point of the story and what do you want your audience to get out of it? Each story should try to hit the 3Es: Educational, Entertaining, and Engaging. This is where you want to dig deep into the details. The more detailed your story is, the more content you'll have to work with across various digital channels. If your story lacks depth, you'll struggle to disseminate your story in multiple places, in multiple formats.

### Channel Second

Now that you have your story, you can figure out the best way to disseminate it. This is where we go wrong. We worry about what channels we have access to and construct a story to fit those channels. You can use your attribution report to see what channels are bringing your audience to your site. You can also see where they are in their customer journey. This will guide you in breaking down your story into different channels and phases of the journey.

You see an example of how we've used attribution reporting here.

A simple example focusing on the story first is the Trust Insights podcast. Every week, we record our podcast with video. This allows us to repurpose the video and audio. In addition, we repurpose the transcript, giving us long and short-form content. We can then edit the audio and video down to use across different social channels. We can quote the podcast in the newsletter. While we're recording, we don't worry about how well the story we're telling will work on a single channel. We focus on the story first. We try to make sure it is engaging, educational, and entertaining. If you hit those points, dissemination will be easy.

Start with your story and then worry about your channels. If you start with the digital channels you might be restricting your ability to reach your audience.

What is your story?

Tell me in me in our free Slack Group, Analytics for Marketers »

***- Katie Robbert, CEO***

## May 18, 2022

## Finding the Symptoms

A few weeks ago I was thinking about the unaware audience. How to help people realize that there was a problem and that you had a solution that would help. At that time, I was thinking about educational content that would support your solutions. It's a good tactic, but it's not the whole story. How do you know what content to publish?

Since then I've been digging deeper. How do you help the unaware audience connect the dots to become aware of a problem? You layout the symptoms.

Ok, taking a step back, how do you, the marketer, find the different symptoms and connect them to the audience, so you can connect them to the solution?

### Natural Language Processing for Product Development

You might be collecting customer feedback, such as support calls or tickets. All this data, when processed, can give you cues about what you might be missing. Using natural language processing can help you understand the frequency of specific terms that will mean something to you. For example, we worked with a client that had millions of records of customer support data. So much so, that they were struggling to get ahead of product development requests. We applied natural language processing to their data and helped them learn the different symptoms their customers had. The customers wanted a new kind of non-dairy milk that accounted for nut allergies. Without processing all that data and finding the trends within it, the company would have fallen behind and not delivered a solution. They needed to find the symptoms of emerging problems to create solutions.

You can read the full case study here »

### Natural Language Processing for Hiring

Are you finding the right candidates? Like your customers, your potential employees have needs that you may not be meeting. When you're trying to hire, you may have a mismatch between what you think your employees want and what you're actually offering. If you're not processing the candidate feedback, you may have job postings that fall into the void. We had a client that ran into this exact issue. They were not attracting the right kind of candidate and couldn't figure out why. We used natural language processing on their data to learn that there was a mismatch between the benefits they were listing and the questions candidates had. They needed to find the symptoms of the job applicants so that they could meet their needs with the benefits offered.

You can read the full case study here »

### Social Listening as Part of the Customer Journey

You may not have mountains of unstructured data waiting for analysis. What your audience wants is still something you find out using social media. This is where social listening can help you. Tools such as Talkwalker or Sprout Social have natural language processing built-in that can summarize conversations and be on the lookout for specific keywords. Using these tools will allow you to learn what problems they are experiencing. You need to understand the symptoms at every stage of the customer journey so that you're meeting your audience where they are.

If you want to explore this topic more you can join me and my good friend Brooke Sellas on May 24th at 12pm EST for Customer Experience through the Customer Journey - an exclusive live webinar.

Once you know the symptoms, and what your audience wants, you can deliver on your content and solutions.

How do you listen to your audience? Tell me in me in our free Slack Group, Analytics for Marketers »

***- Katie Robbert, CEO***

## May 25, 2022

## Are You Using Your Demographic Data?

This week I've been working with Chris to QA and finalize our new Google Analytics 4 course (coming soon!).

Something interesting happens when I do this quality assurance. I try to put myself in the place of the person learning this material for the first time. When I do that, I am reminded of all the things I'm not using for Trust Insights. In this case, demographics data from Google Analytics 4.

For a quick overview, this is how Google collects demographic data:

### Where Analytics gets the data

Once you update Analytics to support Advertising Reporting Features, Analytics collects Demographics and Interests data from the following sources:

| Source | Applies to | Condition | Result |
|---|---|---|---|
| Third-party DoubleClick cookie | Web-browser activity only | Cookie is present | Analytics collects any demographic and interests information available in the cookie |
| Android Advertising ID | App activity only | You update the Analytics tracking code in an Android app to collect the Advertising ID* | Analytics generates an identifier based on the ID that includes demographic and interests information associated with users' app activity |
| iOS Identifier for Advertisers (IDFA) | App activity only | You update the Analytics tracking code in an iOS app to collect the IDFA* | Analytics generates an identifier based on the IDFA that includes demographic and interests information associated with users' app activity |

*If you don't collect the Advertising ID for Android or the IDFA for iOS, you won't be able to collect demographic information about your app users.

Google Data Collection

For the entire run down, [you can visit this support page](#).

Now that we have that out of the way, let's get into the good part. Why should you care about demographic data? If you're like me you might get stuck in a rut when it comes to talking about what your business does. You are trying to find new and interesting ways to say the same thing, "we help you sort out your marketing data".

It occurred to me while I was working through the GA4 course that we have an untapped well of ideas, which is the demographic data we collect. Specifically, interests.

Interests are broken out into broad categories such as fitness, travel, beauty, lifestyle, etc. When you look at it you might think, "what does that have to do with marketing data"? On its own, not a whole lot.

But there are two very strong use cases for this interest data:

### Advertising Targeting

The categories in Google Analytics match the interest categories in Google Ads. You can do a 1-1 with your targeting. When you're advertising on other ad systems, you can look for similar categories and use your Google Analytics interest data as a starting point.

### Content Marketing

This is what I want to spend time talking about. Advertising targeting is all well and good but without a good ad or offer, you're not going to sell anything. This is a snapshot of users that visit the Trust Insights website:

Search... | Rows per page: 10 | Go to: 1 | 1-10 of 94

| | Interests | ↓Users | New users | Engaged sessions | Engagement rate | Engaged sessions per user | Average engagement time |
|---|---|---|---|---|---|---|---|
| | Totals | 3,412<br>100% of total | 55,960<br>100% of total | 47,583<br>100% of total | 51.24%<br>Avg 0% | 13.95<br>Avg 0% | 14m 18s<br>Avg 0% |
| 1 | Shoppers/Value Shoppers | 2,078 | 1,926 | 1,724 | 53.16% | 0.83 | 0m 49s |
| 2 | Media & Entertainment/Movie Lovers | 1,903 | 1,757 | 1,530 | 51.46% | 0.80 | 0m 49s |
| 3 | Travel/Travel Buffs | 1,854 | 1,701 | 1,483 | 50.61% | 0.80 | 0m 49s |
| 4 | Banking & Finance/Avid Investors | 1,829 | 1,687 | 1,433 | 50.91% | 0.78 | 0m 48s |
| 5 | Travel/Business Travelers | 1,781 | 1,636 | 1,517 | 54.31% | 0.85 | 0m 53s |
| 6 | Sports & Fitness/Health & Fitness Buffs | 1,760 | 1,633 | 1,344 | 49.76% | 0.76 | 0m 45s |
| 7 | Lifestyles & Hobbies/Business Professionals | 1,747 | 1,599 | 1,345 | 49.98% | 0.77 | 0m 47s |
| 8 | Technology/Technophiles | 1,700 | 1,562 | 1,460 | 53.15% | 0.86 | 0m 52s |
| 9 | Beauty & Wellness/Frequently Visits Salons | 1,683 | 1,531 | 1,291 | 50.1% | 0.77 | 0m 47s |
| 10 | Media & Entertainment/Music Lovers | 1,570 | 1,427 | 1,162 | 48.38% | 0.74 | 0m 43s |

Visitors to the TI website

It's a varied mix of interests. We have value shoppers, movie buffs, travel buffs, avid investors, and music lovers.

So what do we do with this? First, we need to remember that this is about promoting Trust Insights. What do we do? Change Management, Data Analysis, Strategies and Planning, and Digital Marketing Consulting. Now, the challenge that I have before me is to figure out how to combine that with the interests of the people that visit our site.

Let's take music lovers. I could create content that analyzes data from sites like Spotify or Pandora (if it's available). I could write about how artists approach marketing in the modern world. I could dissect some of my favorite songs and break down the trends and patterns of the music itself. All those ideas are on-brand for what we do at Trust Insights. It's another way to demonstrate our capabilities.

And therein lies the "so what" - finding new and interesting ways to show your capabilities. You don't always have to go in for the hard sell. You can write something entertaining and engaging. Give people a reason to stick around.

How are you using your demographic data?

Tell me in me in our free Slack Group, Analytics for Marketers »

***- Katie Robbert, CEO***

**June 1, 2022**

**Did you hear? We just launched our Google Analytics 4 course!**

You probably got our sales email yesterday. But here I am talking about it again. Can you tell I'm excited? I wanted to take a minute and go a bit more in-depth on our thinking behind the structure of the course. I'll bet you have a lot of questions. Let me see if I can answer them for you.

Q: What's included?

A: Aside from our combined expertise, you're going to get 5+ hours of lessons and material. This includes videos, transcripts, handouts, quizzes, and a final exam. We started working on this as soon as Google made its announcement last March. We knew how important a course like this would be for all of you.

Q: Why is it so long?

A: Well, there are a lot of areas to cover. The issue we find with a lot of courses is that they aren't comprehensive enough. For example, in Google Analytics 4 you need to understand how Google Tag Manager and Google Data Studio work with Google Analytics. A lot of courses would leave you high and dry by only talking through the new features of Google Analytics 4. But then you wouldn't know how the other pieces fit into the larger puzzle. We worked hard to make sure you get the full, 360-degree picture.

Q: What else do you cover?

A: Business requirements gathering, auditing your systems, compliance, attribution analysis, how to hire, and what to do with your data.

Q: But what does that have to do with Google Analytics 4? Isn't it just an upgrade from the old system?

A: Yes and no. The basic idea behind Google Analytics 4 is the same as Universal Analytics. However, introducing a new piece of software into your ecosystem requires change management. This is where we excel. We cover the 5Ps of Change Management - Purpose, People, Process, Platform, and Performance. When you're introducing new software you want to take a step back and make a plan. There are questions you should be asking. Aside from Google giving us all a deadline, why are you moving to a new system? Is it still the right system? Who should you involve? What are your skills gaps? Are you using the data to make decisions? We cover how to ask and answer all those questions.

Q: You said you cover attribution analysis? Tell me more, please!

A: You've got it. Attribution analysis is who gets credit for marketing. In this case, which channels get credit. Google Analytics 4 has done something interesting by breaking out the "source" metrics into three different steps. This effectively creates a mini-attribution analysis. You can see what is driving awareness, what is driving engagement, and what is driving conversions. We have a whole lesson dedicated to helping you get set up for success.

Q: Can I wait until closer to the deadline?

A: Sure. But I wouldn't recommend it. Why? You don't want to be scrambling at the last minute. At the very least you should have your property up and collecting data before July of 2022. This will give you at least a year's worth of data to analyze. This is important because (SPOILER) Universal Analytics and GA4 data is not 1-1. Then you factor the time for the other steps with re-evaluating your goals, reconfiguring Tag Manager, and transitioning your dashboards. Needless to say, you should get started soon.

Q: Wow, ok. That's a lot of information. I should probably get started as soon as possible. Where can I register for the course?

A: You can easily find it at trustinsights.ai/ga4course

If you're not sure and have questions, join our Free Slack Group Analytics for Marketers where you can find me, Chris, and John, along with your peers, to answer all your questions.

***- Katie Robbert, CEO***

**June 8, 2022**

## Out of Touch Employers

If I had to take a wild guess, I would assume you've seen the emails from Elon Musk stating that employee must work a minimum of 40 hours a week, not remote.

*"Everyone at Tesla is required to spend a minimum of 40 hours in the office per week. Moreover, the office must be where your actual colleagues are located, not some remote pseudo office. If you don't show up, we will assume you have resigned."*

Read the full article here.

On the other hand, I was reading research from McKinsey that stated that mental health support is sorely lacking - but vitally important.

*"Employees need, and increasingly demand, resources to help them cope with mental health problems. If companies make mental health services more accessible and intervene in the workplace in ways that improve well-being, they will simultaneously make investments that will provide real improvements in employee outcomes and consequently in company performance."*

Read the full article here.

So, what does one have to do with the other?

When I worked for a company that demanded everyone be in-person and work a minimum of 40 hours a week I was stressed out. I was anxious. I was depressed. I spent almost two hours sitting in traffic to get to the office. Then another six-to-seven hours a day in meetings, leaving one hour to get any actual work done. This often meant that I would stay at the office an extra few hours to catch up, and then spent two hours driving home. Quick math - that makes a 15-16 hour day. That left me zero time for anything else. By the time the weekend rolled around I was too exhausted to do much of anything, let alone address my mental health. To that point, there aren't a lot of medical and mental health practices available on the weekends if it's not an emergency.

Long story short, my commute was contributing to the depression and anxiety I was feeling from a toxic workplace. And it was the hours I was being forced to keep that did not allow me to address my mental health.

There is no shortage of research around work/life balance, mental health, and remote work benefits. It all points to we (people) are anxious, tired, and burnt out. Demanding even more of us is not going to get good results.

I was talking with a client the other day and they are having a lot of staff turnover in rapid succession. They are struggling to backfill the open positions so the remaining team members are being asked to take on more and more responsibility. And then those team members leave, perpetuating the issue.

Back to Elon. You can (and I have) argued both sides of his commentary. Remove Elon from the equation and think about any employer you've worked for. People should be doing the work they are paid to do. Not everyone is productive when they are remote. I get it. There are always going to be exceptions that make a rule hard to enforce. On the other hand, when I think about my previous life and my sixteen hour days (which didn't include cooking, cleaning, having a personal life, and appointments) I bristle when thinking about those employer demands.

In the case of Elon, he's totally in the wrong. His actions don't match his words. He is taking a 23 billion dollar bonus. He's incredibly out of touch. So take his demands with a grain of salt.

So what do we, the employees, do?

As an employer, you can ask whatever you want of your employees. However, you have to deal the the consequences if it doesn't align with what your employees can give. As an employee, you can choose to not work for someone that doesn't support what you need. However, and this is a hard pill to swallow, you may not ever find your perfect position so you may need to re-evaluate what is critically important and what is nice to have.

What's your take? Let me know in our Free Slack Group Analytics for Marketers.

***- Katie Robbert, CEO***

## June 15, 2022

### Pro Tip for Hiring Managers

First, we had The Great Resignation. Now we have The Great Reshuffling. All to say that the pandemic has been a catalyst for many people to find new positions that allowed them to work remotely and still make a livable wage. Fast forward two-plus years, and people are still re-evaluating their work-life balance, pay grade, and responsibilities.

What does this mean? There are lots of great candidates out there looking for new positions. This also means that there are lots of hiring managers scrambling to make quick decisions that will impact the business.

Over the next few weeks, I'll be talking about interviewing and hiring. Today, I want to focus on the hiring manager. Specifically, how to interview candidates for roles you don't know all that well.

As a hiring manager, you may find yourself out of your depth. You're likely interviewing candidates will skills you don't have. You may not even be a hiring manager or have interviewed candidates before. So let's start there. What is a hiring manager?

A hiring manager is the "future manager" of the person that you are interviewing. Depending on the structure of your company, you may be the only person conducting interviews. Sometimes, you'll work in concert with Human Resources to hire new team members. In larger companies, there may be whole teams that conduct many rounds of interviews.

Not all employees that act as hiring managers make good hiring managers. With so much turnover, many people who have never acted as a hiring manager are being asked to step in. Interviewing candidates and making decisions on who to hire is not easy and is its own skill set. It can be overwhelming and daunting. Candidates are putting their best foot forward, all shiny and polished. What you read on their resume is the best of what they have to offer. It can be hard to know if you're seeing the real person in the span of 30 minutes.

So, how do you approach an interview if you aren't used to being a hiring manager?

You cannot know everything. Let's get that out of the way. I know it's harsh, but it's true. For example, I only understand about 60% of what Chris says. Does that mean I can't manage him? Absolutely not. Here's the secret - but first, a little background.

For about a decade, I managed engineers, database architects, epidemiologists, sales, and marketing teams. Am I an expert in all those things? Nope. So, what makes me qualified to manage and hire for those teams?

It's all about the questions you ask. When I was in that previous role, part of my job was to advocate for those teams to the senior leadership team. I was their representative in meetings to get them what they needed. Those teams helped me understand what they were doing in a way that I could communicate on their behalf.

This is the secret. This is how you approach interviewing as a hiring manager. Let's say I was interviewing for a data scientist role for Trust Insights. I don't know the ins and outs of data science - so I would not know if someone was BS'ing me and throwing jargon my way.

It's on you to dig deeper. Have the candidate explain specifics to you as if you were going to have to advocate for them to someone else. Ask them to give concrete examples of not only what they have done, but why they chose to do it that way. You need to ask questions about cost and time savings, the accuracy of outcomes, and the after actions. Don't stop at the general experience.

For example: "*You mentioned that you use machine learning to do your analysis. The senior team only cares about conversion rates on the website. Help me understand why that is the right method so that I can justify your analysis choice. They will ask me if this is the most accurate and cost-effective way to look at the data.*"

Another example: "*On your resume, you mention that you increased website* *traffic by 60% with a consistent SEO strategy. I need to justify spending money on SEO to my management team. Help me understand your specific tactics so that I could do that".*

A word of caution - this is not the same as "pretend I know nothing about this and explain it". The problem with that tactic is that it opens the door for the candidate to not tell you anything valuable. That question does not lend itself well to making good hiring decisions. Keep tying it back to advocacy on the candidate's behalf. They need to help you, so you can help them.

This technique works for all kinds of skills and roles. The goal of this exercise is to see if the candidate understands the material or if they know a few buzzwords. The right candidate will be able to break down a complex concept into more simplistic terms. You're still asking for examples of their work but by framing it this way you get more specifics and less noise.

Do you need support with your hiring process? Find me in our Free Slack Group Analytics for Marketers.

***- Katie Robbert, CEO***

**June 22, 2022**

## Asking Better Interview Questions

Last week I talked about pro tips for a hiring manager that is out of their depth. This week I want to focus on the rest of the interview.

Asking one good question isn't going to cut it. You need to get to know your candidates and often, you have limited time to do so. You're making a big decision based on a small sample of information. Candidates are trying to show you only the best of themselves. You might think you're trying to figure out if the candidate is a culture fit by asking a quirky question. Or understand their critical thinking process by asking them how to fit a football field in a paper towel tube, but you're wasting your time with these.

I asked our [Slack Community] what were some of the worst interview questions they'd heard and here is what they told me:

- *Where do you see yourself in 5 years?" I said "Celebrating the 5th year anniversary of you asking this question".*
- *"What is your biggest weakness?" questions, or the more abstract ones like "If you had an elephant, what would you do with it?"*
- *"What is your biggest weakness?" questions, or the more abstract ones like "If you had an elephant, what would you do with it?"*
- *"how many tennis balls can you fit in a school bus?"*
- *Why are manholes round? How much do you charge to wash every window in Seattle? How do you move Mount Fuji?*
- *"How many gas stations in America? How big is a baseball diamond?"*
- *"If you were a fruit, what fruit would you be and why?"*
- *"My first start-up asked me to explain what the company values meant to me using famous 90s hip hop songs."*

And of course - from Chris:

- *"How do you deal with stress?" By punching people.*
- *"How do you handle strong personalities?" Also by punching people.*
- *"What's your biggest weakness?" Honestly? My right hook.*
- *"How would you describe your work ethic?" I work and try to be as ethical as my employer will permit me. How ethical is your company?*
- *"Tell me about your previous positions." That's what the resume is for,*

*dummy.*

- *"Tell me about yourself." Well, I'm 5'3", I like long walks down dark alleys, and I own more knives than you probably own shirts.*

So - why are these questions a waste of time? Because you're not getting to the heart of what you need to know. Yes, you need to know about the candidate's experience. Yes, you want to determine if they might be a good culture fit. Yes, you want to know if they can problem solve. But bad questions like these tend to elicit bad answers. And then you're stuck making decisions based on bad data. Which is bad.

If you want to figure out if someone would be a good culture fit, directly ask what their ideal working culture entails. Ask them what red flags they look for. Ask them what the culture was like at previous jobs and what they liked best and least. This will give you a better sense of whether they will be able to adapt to your culture.

If you want to see how someone solves problems, ask them about a real problem related to your business and the job function. "Our community engagement has gone down the past few months. How would you approach this problem to bring the numbers back up?" Show the candidate real data and ask them to come up with an action plan.

You can ask unconventional questions, but make sure they provide value to you. **Bad questions lead to bad answers and bad decisions.**

The questions you ask should help you decide who to hire. There will be time once you've made your hire to ask about someone's favorite balloon animal.

Want to share your worst interview questions? Tell me in our Free Slack Group Analytics for Marketers.

***- Katie Robbert, CEO***

## June 29, 2022

## And Now for Some Good News...

Regardless of your opinions of the current state of the United States, I'm confident that we can agree on something. We're all experiencing some level of cognitive overload and exhaustion.

If that sounds like you, feel free to skip the newsletter this week. My feelings won't be hurt. I'll see you again soon.

If you would like a bit of distraction, stick around and I'll do my best.

Like me, you may find yourself overwhelmed with bad news these days. Instead of the usual marketing and leadership advice, I figured it was a good time to take a break and focus on good news.

With that, here is a round-up of sites where you can get good news:

Good News Network

Since 1997, millions of people have turned to the Good News Network® as an antidote to the barrage of negativity experienced in the mainstream media. Because of its long history, staying power, and public trust, GNN is #1 on Google for good news.

The website, with its archive of 21,000 positive news stories from around the globe, confirms what people already know–that good news itself is not in short supply; the broadcasting of it is. From our 5-star app, to our new book (And Now, The Good News: 20 Years of Inspiring News Stories), to our weekly Good News Gurus podcast, and Morning Jolt email newsletter, GNN is a daily dose of hope for millions of fans.

Positive News

Positive News is the magazine for good journalism about good things.

When much of the media is full of doom and gloom, instead Positive News is the first media organization in the world that is dedicated to quality, independent reporting about what's going right.

We are pioneers of 'constructive journalism' – a new approach in the media, which is about rigorous and relevant journalism that is focused on progress, possibility, and solutions. We publish daily online and Positive News magazine is published quarterly in print.

[The Good News Hub]

We decided that a news website that focuses on positive and uplifting news stories was one way that we could help to create positive change in the world.

Studies show that negative news can have detrimental effects on mental health, and as 90% of all news media focuses on the negative aspects of life, we wanted to highlight the positive things happening in the world, especially at a time when people are finding that more difficult.

Reading positive news has many beneficial effects, including relieving stress, and improved mental health!

This is not an exhaustive list. But if you need a break from the news that is upsetting you should spend a little time with the good news that is still happening.

I hope to return to our regular newsletter open next week. In the meantime, if you want to talk, hear more good news, or just hang out - [come find me in our free Slack group, Analytics for Marketers].

***- Katie Robbert, CEO***

## July 6, 2022

## Outdated Plans in a Modern World

I saw something floating around the internet last week about how the Constitution, written over 200 years ago, was written by men who didn't believe in science or had electricity. I'm paraphrasing since I can't seem to track down the exact post.

Take heart, this is not a political post that goes into America's history. I wanted to use that for reference since that's what got me thinking; business plans.

Most, if not all companies, have a business plan. I say most because I know there are quite a few that operate without one.

Let's start at the top. What is a business plan? It's the roadmap for how your company is going to operate. It should cover basic things like who is your target audience and how you're going to make money.

When I worked as a Product Manager and we were transitioning from clinical trials to commercial products I was asked to write a business plan for my product lines. It was an interesting exercise that helped me understand the need to do a lot of research upfront. I didn't realize that the second I finished researching and writing, it was out of date. I helped my product line evolve from being available on a floppy disk, to a CD-ROM, to a web offering. And the business plan was never updated. The plan had sections that were for future thinking, but we never went back to see if what we thought would happen was correct.

This is where I started thinking - when was the last time you reviewed your business plan? If you're a smaller business, you have likely reviewed it recently - or at least know where it lives. This is not always the case for larger companies.

I worked with a larger client that, in a lot of ways, operated like it was 1983. The target audiences, the strategies, and the offerings were all firmly aligned with a very outdated business plan. However, because this company was so large, getting the business plan updated with the current century would be a Herculean effort. If they aren't able to "get with the times" they will fall behind their competitors and alienate their customers.

So, what do we do when we face this situation? How do we move forward in a modern world with outdated plans?

### Don't try to boil the ocean

While not my favorite metaphor, in this situation it fits. Trying to overhaul documentation that guides a company is a lot of work. Instead, prioritize the sections that are the most broken. Start by asking two questions.

- Are we providing products/services that people need?
- Are we targeting the right audience?

If you said no to any of these, this is where you'll want to start. In marketing, we focus a lot on the target audience and we know that it's ever-changing. People don't stay static and where they get information is a moving target. Our marketing plans are living, breathing documents that we update regularly. For some reason, we don't treat our business plans the same way, they tend to be set in stone. Reviewing your business plan is an opportunity to realign with your teams. They are the ones that are in the weeds. Ask them what's going on, what's changed, and what customers are saying.

Here is my challenge for you. Make your sections of your business plan as fluid as your marketing plan. Your audience is always changing, therefore so should your offerings. When you do your annual planning, make time to also review your business plan so that you don't find yourself 200 years from now trying to operate from antiquated ideas.

Want to talk about how to make your business plan fluid?

cCome find me in our free Slack group, Analytics for Marketers.

***- Katie Robbert, CEO***

## July 13, 2022

## Ditch Your SEO Tools for Once

This week, we've been talking about our own internal SEO strategy and where we're running into roadblocks. We've exhausted our keyword lists and we're written about the same topics over and over.

I can't be alone when I think, "Oh shit, now what?"

Like me, you probably turn to your SEO tools and Search Console to see what to do next. You likely also look at your social listening tools to find out what conversations taking place. This is a good place to start, however, these systems have limitations. They are reactive. To give you data about keywords, topics, and clicks, the audience needs to have taken an action and it needs to have happened online where these tools can see it. They are dependent on the right conversations happening in the right places at the right times to pick up the data.

So, how do you get better intel about what your audience cares about?

**Ask them.**

This probably seems obvious but it's easier said than done. Back to the limitations of social listening tools. They can only see what people are comfortable talking about publicly. They are also limited to the volume of conversation around topics that you care about. If people aren't talking about you, there is no data to analyze.

How do you resolve this?

You need to ditch the technology and talk to people. Make connections. Ask questions. You're not going in for a hard sell of anything. You're listening. Just listening. Here are some places to start.

### Ask your community

We run a free slack group, Analytics for Marketers. It's open to anyone interested in analytics and marketing. If you don't have your own community, join one. Join ours. There is no shortage of hubs where people gather to talk about their shared interests. Many of these communities exist on platforms that social listening and other monitoring tools can't reach.

I've learned that there are two kinds of members. First, there are lurkers. These are the people who see and read everything and rarely or never interact. Second, there are participants. These are members who respond and ask questions. Both types of members are important. You should have no problem gathering feedback from the active participants. The challenge is getting information out of those that don't often engage. You can try creating smaller focus groups, create an online survey, or set up some one-on-one time. Create a safe space and give them an opportunity to share their opinions without fear of judgment from other members.

### Talk to your current and former customers

These are people who already know (and hopefully like) you. They know your business and they know your expertise. Ask them what other information they would like to learn from you. Ask them what content they wish existed to help them solve their problems. Remember, you're not selling anything. You're trying to find out what pain points you're not currently addressing with your content. You may find that you have expertise that you haven't thought to share and pro tips that could help others.

Using technology to plan out your SEO strategy is always a good start. But don't stop there. Tools will always have limitations to what data they can gather. The next time you're stumped, ask around and see what other people are thinking about.

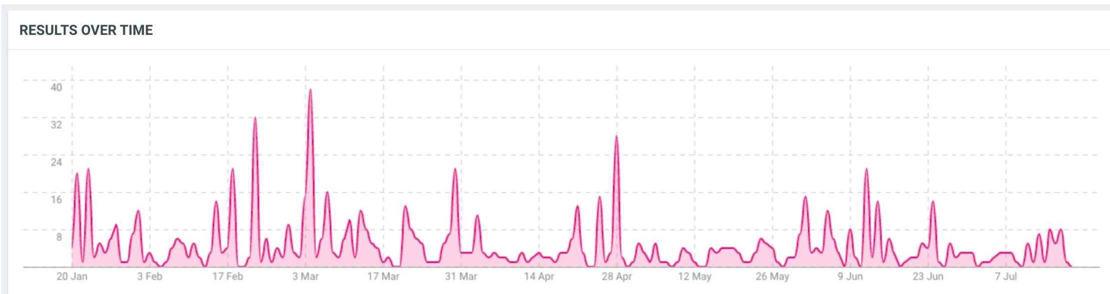
Want to come to talk to me? Join me in our free Slack group, Analytics for Marketers.

***- Katie Robbert, CEO***

## July 20, 2022

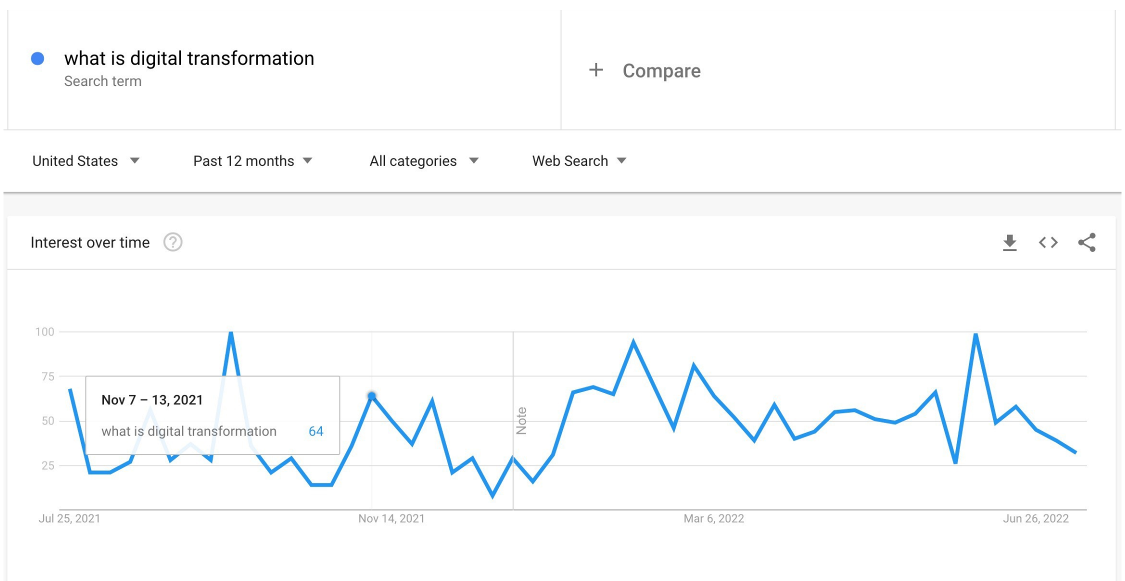
## What Lives Underneath Buzzwords?

This morning I saw someone on Twitter mention "digital transformation" and it struck me that it's been a while since I've seen the term used. It is one of my least favorite buzzwords because it's so ambiguous.



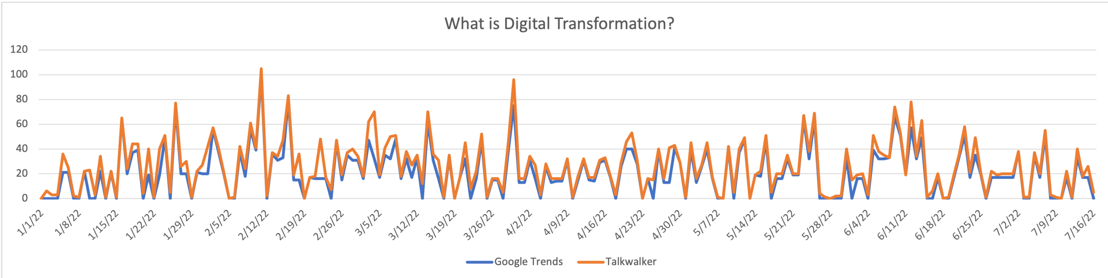

Talkwalker Digital Transformation

Using Talkwalker, I was able to see that people are still talking about Digital Transformation. What is unsurprising is that despite the volume, it has a pattern. One that I can only guess is that once a quarter some executive says "we need a digital transformation" and then people run to Google and ask, "what is digital transformation?".




Google Trends Digital Transformation

When you overlay the two, the pattern is almost identical, thus demonstrating my point.




Out of curiosity, I Googled "what is digital transformation" and I've got to tell you that the results are terrible. There is no one definition, which I can only imagine is confusing for someone trying not to get fired. There are plenty of lists that tell you the 4 components, the 5 success factors, and the 6 places to start. None of the results align though, it all seems like guesswork.

We've been debating what "digital transformation" means in our Free Slack Group, Analytics for Marketers. [You should join the conversation!]

What lives underneath buzzwords is actual work. The basic definition of a digital transformation is the act of bringing tools and technology into a non-technical company. Then, you're continually adapting and improving your processes as the tools get more sophisticated. This is not new. All companies go through this.

Well, when you put it that way, what's the big deal? Why does everyone suddenly need a digital transformation?

Here's my two cents (because that's why you're here, right?). The term "digital transformation" is convenient. It sounds like a big deal, something that is going to revolutionize your business.

But in reality, companies turn to the latest shiny object to fix things that aren't working. Customers aren't happy? Digital Transformation. Falling behind your competitors? Digital Transformation. Massive staff turnover? Digital Transformation. Not hitting their numbers? Digital Transformation.

I know, I'm picking on digital transformation pretty hard. Substitute digital transformation for "big data" "single view of the customer" or a buzzword that I recently learned, "SoLoMo" - which means "social/local/mobile".

Super cringy, I know. At the end of the day, it all amounts to the same thing – adapting your business to keep up with what your customers want. Skip the buzzwords. They won't help you in the long run. Do the work of getting to the root of the issue and then fix what's broken. Call it whatever you want but don't feel like giving it a fancy label will turn things around.

And don't forget about the people and processes! This is where almost all "digital transformation" goes wrong. You can't introduce new technology into your team without getting people on board and creating the process around the tech. Well, you can. But it won't work. Trust me.

Has your company tried to use buzzwords to fix its issues? Come tell me about it in our free Slack group, Analytics for Marketers.

***- Katie Robbert, CEO***

## July 27, 2022

## Niche Content for the Customer Journey

Do you create niche content? Do you know your customer journey? Have you ever thought of combining the two so that you're creating niche content for the customer journey?

This got me thinking about content planning. In an ideal world, we could be everything to everyone. In the real world, we're trying to reach our audience at a specific point in their customer journey when they need our content the most. This could be awareness, purchase, or every stage between. Thus demonstrating that you cannot be everything to everyone. Your awareness content won't hit the same as the hard sell.

So - why can't we do both? Why can't we create niche content and mass appeal content?

You can. In my experience, companies that lean toward mass appeal content do so because they don't have a great grasp of their customer journey. They don't know the timing or the channels. It's also easier to create mass appeal content (but that's a topic for another time). What happens is they mismatch platforms and messaging and don't provide specific information. It can be difficult to pinpoint when someone is at a specific stage of your customer journey if they are not live on your website.

I just had an interesting conversation with my friend Brooke Sellas from [B Squared Media] and she is working on this really cool measurement concept that tags social conversation for different customer journey stages. And it got me thinking - is this the solution I didn't know I needed? Spoiler - the answer is yes.

When we (Trust Insights) do an attribution report we're limited to understanding what comes into our website through different marketing channels. This is useful because we can make sure we're reaching people at their appropriate customer journey stage and create content around that. The challenge is that perhaps the majority of our email subscriber list is at the engagement stage, but not everyone is. We don't know that for certain with our reporting. So we throw in some language that sells our services. We make sure that we give context to who we are and what we do. We're back to trying to be everything to everyone. And not everything happens on our website. To assume so would be incorrect.

And limiting yourself to only what happens on your site is reactive. I want to be more proactive and in the moment. I want to reach people before they even know we exist.

That's where Brooke's work is useful. She's using social listening software and training the system to identify conversations around specific keywords and topics for different customer journey phases.

It blew my mind. It's so simple, yet so genius.

What this does is allow companies to create that niche content for different audience segments and have it at the ready. Instead of broadcasting "This is what we do" on social media to everyone all the time, you can narrow down your focus and share that message with people who are ready to hear it. You're not guessing. You're cutting out the noise.

Like I said, mind blown.

This brings us to the "so what" this week. You should create broad and niche content. Broad content is for everyday use. It's evergreen, it's for anyone. Niche content is for select groups at select times. You need both in your arsenal. Start by figuring out what are the stages your customers go through on your sales funnel. Those are your customer journey phases. Then take a look at what they are doing in those phases. What do they typically engage with on your website? What kinds of questions do they ask? That will help you understand what they care about.

Think about it like this. If a prospect comes to you and says, "I'm interested in your blue widget, what are the technical requirements?" you want to have an FAQ ready. If all you have is a company overview, you've missed an opportunity. Don't limit yourself to what happens on your website and don't overlook the power of social listening.

If you want to check out Brooke's new book, you can find it here.

Are you using social listening to reach people?

Come tell me about it in our free Slack group, Analytics for Marketers.

***- Katie Robbert, CEO***

Of the many tools in the Google Marketing Platform, none is more overlooked than Google Search Console. Marketers assume it's just for SEO, but the information contained within benefits search, social media, public relations, advertising, and so much more. In my new Google Search Console for Marketers course, you'll learn what Google Search Console is, why it matters to all marketers, and then dig deep into each of the features of the platform.


When you're done, you'll have working knowledge of the entire platform and what it can do – and you'll be ready to start making the most of this valuable marketing tool.

👉 **Click/tap here to register**

Or visit:

https://www.trustinsights.ai/searchconsole

## August 3, 2022

## What Happens When Your A/B Test Doesn't Give You the Answer?

This may or may not come as surprise, but I am never satisfied with things if they are static. I feel like most of you out there can agree with that sentiment.

Recently, I wanted to shake up our website traffic and see if I could generate more conversions. I designed and ran an A/B test. I let it run for 30 days. I would check every few days to see who was winning, A or B. You know what happened at the end of 30 days?

Nothing.

The test ran, it ran correctly. But the results were inconclusive. Each option, both A and B were equally engaging (or not engaging) to website visitors. Which means I don't have the answer I was looking for. Where do you go from here? What happens when your A/B test doesn't give you the answer?

The good news is you always have options.

- Re-run the test
- Run a new test
- Run a test that isn't A/B testing
- Leave things as they are

Let's unpack these, shall we?

### Re-run the test

You can re-run the test you just ran to see if you get different results. Why should you consider this? You may have a seasonality to your site (or ads, or email) that wasn't factored in. For example, I let my A/B test run for the month of July. Historically, that's one of our slower months. Had I realized that earlier in the year I probably would have slated a different time frame. Take a look at your data before deciding the timing of an A/B test. That might make a difference.

### Run a new test

This one seems pretty obvious. If the first test was inconclusive, run a new test. You can design something completely different than the first one, or use the same control and test a new experiment. For example, I was testing part of our home page to see if changing the content would result in more conversions. When I design a new test, I'll use that same section of the homepage but with different content, with the same goal of more conversions.

### Run a test that isn't A/B testing

This is more along the lines of market research, so not really a test at all. Instead of a programmatic A/B test using software like Google Optimize, ask your customers and community what they want. These are people you already know and who know you, versus anonymous people visiting your site. You can show them the existing asset and then give them different options. Ok, it's an A/B test. I almost had you though.

### Leave things as they are

You know what? You don't have to change anything. If you run an A/B test and the results are inconclusive, you don't necessarily need to start making other changes. Maybe it was the wrong test and the wrong time. Give it a minute. Breathe a little. Go back to your data and see if there is something different you should be looking at. Maybe it's not the asset, but the audience or the offer that's wrong.

At the end of the day, more testing is always a good idea. Test early, test often. Behaviors change, platforms change, and solutions change.

Are you A/B testing your marketing?

Come tell me about it in our free Slack group, Analytics for Marketers.

***- Katie Robbert, CEO***

## August 10, 2022

## Writing Prompts for Marketers AKA Blog Idea Generators

You know what doesn't exist? Writing prompts for marketers.

Hold on, hold on. Before you start telling me I'm wrong, hear me out.

If you do a browser search for "writing prompts" or "writing prompt generators" you get plenty - but they are all for writing fiction.

If you qualify your search with "for marketing" you get results like "Top 10 lists of the best content".

Neither is what I'm looking for.

I previously wrote this post about creating compelling content so I figured that would be a good place to start. You can use your keyword or topic list to break the ice and start writing your content. Many SEO tools have "questions" built in.

But what if you're really stuck and/or don't have access to an SEO tool? What you want is a blog topic generator. Here are a few that I was able to find and vet (without having to sign up for anything):

Hubspot Blog Generator

I'm already a Hubspot user and fan, so this seemed like a generator I could trust to give me decent prompts. You can add up to five nouns (your topics) and the generator will give you prompts, or headlines. This tool was pretty good and I would recommend it if you have a topic but have no idea where to start. You might get the spark of a new idea.

copy.ai

Similar to Hubspot's blog generator, copy.ai gives you prompts based on your topic and a rough idea of what you might want to write about. I felt like the headlines generated by this tool were a little more spot on than Hubspot. Just one person's opinion.

Portent Idea Generator

This one might be my favorite, only because it's a bit wacky. Like the others, you put in your topic and it will suggest headlines for you. What's different is that it's a little more clickbaity which I would advise against for your writing. However, because it's off-the-wall (ex: Why digital marketing is scarier than clowns) it can break out of your writer's block by helping you stop over-thinking. Just me? Ok. Moving on.

So - have I broken my writer's block? Not really. But I had fun exploring these tools. I'm excited to know that I don't have to wing it when I'm stumped on what to write about.

Do you use blog idea generators?

Let me know in our free Slack group, Analytics for Marketers.

***- Katie Robbert, CEO***

## August 17, 2022

## Why Do We Hate Change? And What Can We Do About It?

Change is hard. I know, understatement of the decade. Anyone who tells you they enjoy constant change is probably lying to you, or a psychopath.

Kidding!

Sort of.

Why do we hate change so much?

According to the Harvard Business Review, there are 10 solid reasons why. [You can read the whole thing here.]

The gist is people (myself included) do not enjoy the loss of control and the uncertainty that comes with change. It also creates more work, and don't we already have enough to do?

I was told recently that I needed to modify my diet. I have a (non-life threatening) medical condition and even though I eat well already, I need to restrict my diet even further. Let me tell you, there has been a lot of huffing and puffing, digging in my heels, and general feelings of "I don't wanna". I've done it before and it sucks. Change is hard. Especially when it involved giving things up.

So, I decided that I needed to put on my big girl pants and for the sake of my health, I would figure out how to approach this in a way that was manageable. And then I remembered that I created the 5P framework. In case you forgot, the 5P's are:

- Purpose
- People
- Process
- Platform
- Performance

You can read more about it here.

At this point, you're thinking, "sheesh, she'll tell us any story to promote her lame framework!" Well, that's where you'd be right and wrong. I'm telling you this story about myself because I want you to understand that I truly believe in the things I create for Trust Insights. They are an extension of who I am as a person. I use the 5Ps in my everyday life. And, it's my job to promote my work - so here we are.

Anywho, back to the story. I started thinking about how much I didn't want to make this change, knowing that I needed to do it anyway. Breaking it down into the 5P framework will at least give me the opportunity to create a plan for myself. What does it look like?

- Purpose: Change my diet to get my symptoms under control
- People: Me & my husband (who does the cooking)
- Process:
    - Not cold turkey (pun intended). I need to eliminate foods gradually so it's sustainable.
    - Find a list of acceptable foods and create a meal plan.
- Platform: A daily symptom tracker to see what's working and what's not. Google sheet for meal planning.
- Performance: How do I feel? Did my energy go up? Did my other symptoms lessen?

When I look at it like this it doesn't feel as overwhelming. This is an overly simplified version - I still have to do the research and planning and prepping. But you get the idea. You can apply the 5Ps to just about any problem you need to tackle - at work and in your personal life.

If you have a large project or task that you've been putting off because it feels overwhelming, I feel you. It's hard. Try the 5P Framework to see if it simplifies things. If nothing else, it will help you understand if the project is important and if you have all the pieces.

How do you manage your projects?

Let me know in our free Slack group, Analytics for Marketers.

***- Katie Robbert, CEO***

### August 24, 2022

### Vague, Unfocused, Pointless Content

What do you do when your content is vague, unfocused, and has no point?

Excellent question - this is the problem I find myself having at the moment. I've been working on this week's newsletter and to be honest, what I wrote is terrible. I won't subject you to it.

It was mostly disconnected thought with no point. Unfortunately, a lot of content ends up like this (not just mine!) I have lost count of how many times I've read a post or an article that has no real point (I'm looking at you, thought leadership pieces).

How do we fix this?

I'll be honest with you. I'm coming up short this week on solutions but the problems are glaringly obvious to me. Eventually, I will have to face my other post and rewrite the heck out of it to make it useful.

In the meantime, I'll leave you with some thoughts from our free Slack group, Analytics for Marketers.

I recently asked them what their current pain points are. Here are some of the responses:

*"GA4. Everything about it is a challenge"*

*"Gaps in data and a long pathway from lead to enrolled student"*

*"Talent. We need more hands on deck...to execute the strategic opportunities in front of us"*

What struck me most is that these are common issues. I see and hear about a lot of teams that are struggling with similar issues.

So where are the solutions if these issues are so common?

I see I'm coming back to the same question as I had earlier, "how do we fix this?"

The content I was working on earlier was some vague thing about how a lot of our problems aren't technology problems. The problem starts with people. That is what you need to fix first.

The first pain point - GA4 (Google Analytics 4) - that's a people problem. Not that the people using the system are the problem, but that the people who designed it and rolled it out are the problem. GA4 was rolled out suddenly and then slowly in disconnected pieces. Had there been better communication around the whole experience, marketers may not be so frustrated.

The second pain point - gaps in the data - that's also a people problem. Sure, there are technologies that could start to fix this but first, there needs to be a process around how this data is collected. The technology that you put on top of the problem won't work correctly without a process. To create the process, you need people to decide what it's going to be.

The last pain point - talent - is, you guessed it, a people problem. The person that mentioned this point is working with a staffing agency as the solution.

So what's the point here? The point is that most, if not all, problems start with people. Whether there is a lack of clarity on what they want to do, whether you don't have enough of them, or perhaps it's just the wrong fit all around. People dictate the process. The process dictates the platform. Not the other way around. Oh, and people create technology. So if it's not working, start with who made it.

My problem is 100% a people problem - me. I can't get my head around the concept I was trying to write about. I'll get back to it though and keep trying to work it out. Stay tuned for that piece.

In the meantime, join our free Slack group, Analytics for Marketers, and come tell me about the “people” problems in your company. .

***- Katie Robbert, CEO***

## August 31, 2022

## Lessons From an Accidental Community Manager

I'm not great at social media. I'm pretty terrible at it. I'm terrible at the parts where I have to promote myself and create marketing jargon. (I feel like) I tend to come across as a used car salesperson.

But social media is also about connecting, networking, and fostering relationships. This is where building a community can be useful. A few different Analytics for Marketers members asked what it takes to run a community so I figured it was time to put my thoughts together.

Here is what I've learned so far - hopefully, some of this helps you if you're new to community management or just want a different perspective.

### Lesson 1: Have an intention - and stick with it

This might be where a lot of communities go wrong. If you're building a community with the sole intention to sell your stuff, say that upfront. Before you start building anything, start with some basic questions:

- Why does your brand need a community?
- What will you get out of it?
- What will community members get out of it?

That last question is the most important one. If you can't give people a reason to show up, they won't. Make sure you have a clear intention and that you're transparent about it.

### Lesson 2: Set expectations

Just like knowing your intention, define what is and is not allowed. Create some guidelines and be willing to enforce them. In the 4+ years that we've been running Analytics for Marketers, I've only had to remove one member for violating our guidelines. When a new member joins we give them a set of rules so that no one can say, "I didn't know". Removing someone isn't fun - but if you're not living up to your own expectations you can't expect members to do the same.

### Lesson 3: Active listening

Don't just wait for your turn to talk. If someone posts something in your community, unless it is addressed specifically to you, take a moment to pause. Breathe. You don't have to jump all over the poster with a response. Let the rest of the community chime in before you stomp all over it.

### Lesson 4: Be authentic to your brand

My personal brand is me. So naturally so is the brand persona of Trust Insights. Well, it's half me, half Chris, with a dash of John. What that means is that I speak and react in the community the same way I do in real life. I'm sarcastic. I'm hilarious (I swear, it's true). I can admit when I'm wrong and I'm not afraid to tell people what I don't know. When you start posting on behalf of your company (or yourself) decide who you want to be. What are you known for? What is your voice? Does the culture need to be buttoned up or can it be more casual? There is no right answer except the ones that work for you.

### Lesson 5: Not every post will hit the mark

This is still tough for me some days. Since the majority of our posts get some kind of engagement it's hard when a post doesn't. But it's ok. As your community grows, what they respond to will change. If you find that you're getting less and less engagement over time, you may want to revisit your intention and the kinds of content you're posting. When in doubt, ask people what they want and give it to them.

### Lesson 6: You're not alone

This might be one of the best things about having a community. You're not the only one there. You can ask for help and support. You can ask for guest moderators and user-generated content. You can ask questions you don't know the answers to.

### Lesson 7: Know where your audience wants to spend their time.

If you create a community on Slack but your members want to be over on Discord you have a mismatch and you'll have a hard time growing. When we originally started Analytics for Marketers it was a Facebook group. A couple of months in we realized that Slack made much more sense for the kinds of people we wanted to be able to connect with. We recently talked with the community about moving to Discord and learned that, at least for us, that's not something we need to consider any time soon.

Keep in mind that there are lots of great community managers out there who focus solely on this function. These are the lessons that I have personally learned through trial and error. I hope you find one or more of my lessons helpful!

Are you running a community and have your own lessons you've learned?

Come tell me about it in our free Slack group, Analytics for Marketers »

***- Katie Robbert, CEO***

## September 7, 2022

## Why You Need to Take Care of Your Data

Imagine your data is water.

Imagine your tech stack are the pipes in your house.

Imaging your marketing and sales funnel are the connection points of the plumbing.

Image your reporting are the faucets and appliances that you use and rely on.

Now, imagine that you have a leaky pipe somewhere but you don't know it. This leaky pipe connects to your shower, your washing machine, and your kitchen sink.

The leak in this pipe is from a small crack. This crack could be fine for a while but because you don't know it's there, it stays broken for a few months. A few months go by and you still don't know about the crack, but you start to notice that your water pressure isn't as strong as it used to be. You also notice that your water isn't draining as quickly as it should. Probably a clogged drain. But don't worry, it's not totally stopped up, you can still use it.

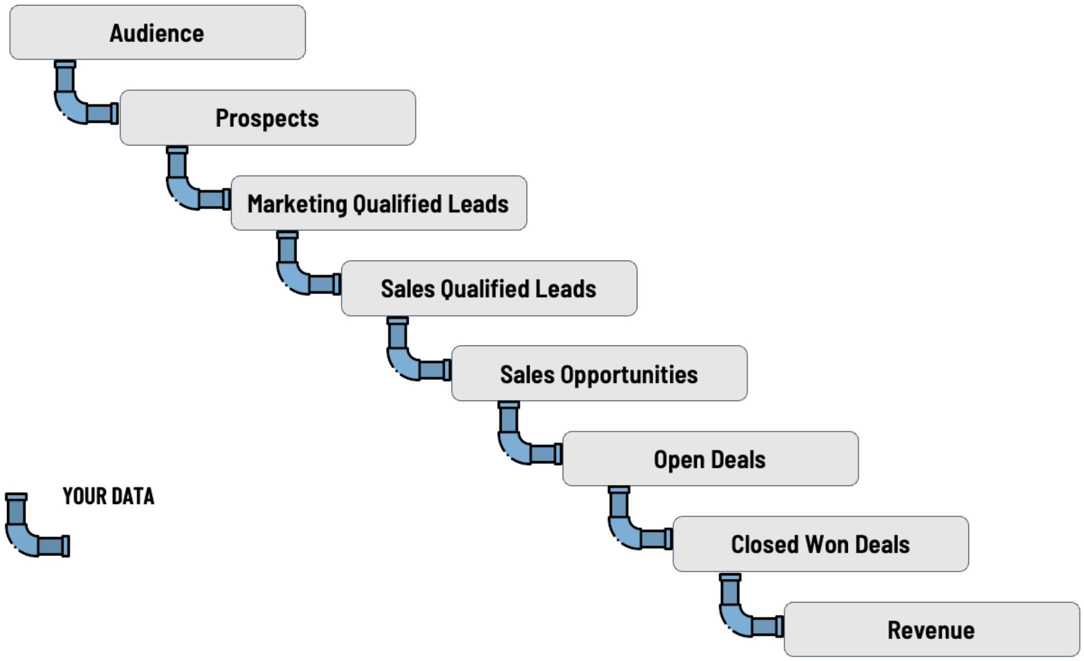
A few more months go by and you happen to be putting something in the basement. You notice a wet spot on the floor that seems to be coming from the second half of your unfinished basement - you know, where all the pipes are. You open the door to the side of the basement that you lovingly dubbed "the murder room" because it's dark and dank and generally unpleasant. You hear a dripping sound. But because it's dark, the light switch is across the room, and you didn't bring your phone, which has a light, you back out and close the door. You go back upstairs to grab your phone, which has a flashlight, and are immediately distracted by your group text chat. You forget about the dripping noise.

A few weeks and it occurs to you that you have very little water pressure and, weren't you going to do something in the basement? You suddenly remember that you saw a wet spot and heard dripping, and oh-by-the-way, the drainage is still really slow. Concerningly slow. This time, you happen to have your phone in your pocket so you pull it out and open the door to the "murder room". You click on the flashlight and see that, yes, indeed, you did hear a dripping noise a few weeks ago. Not only did you hear a dripping but now you can see the source of the wet spot on the other side of the wall. The pipe that was a small crack a few months ago is now significantly cracked and will need to be replaced. You'll also need to address the moldy smell that has started to infiltrate your nose.

As you open the Chrome app on your phone to look for plumbers, you also remember that the drain has all but stopped draining. You're mentally kicking yourself for not addressing these things sooner. And you should be. You get a hold of a plumber who can come out to take a look at your leaking pipe and slow drain. However, you forgot that today is Sunday so the prices are nearly doubled. The plumber says that he can either come today or next Thursday, it's up to you. You decide to bite the bullet and pay extra to have him come today to stop the leak and clear the drain.

Now, raise your hand if you or someone you know has experienced this. You can't see it, but I'm raising my hand too.

Next, I want you to re-read that story but replace any mention of water with data. The point I'm (hopefully) making is that the things you rely on need to be taken care of. Not just when they are most broken but before they get a chance to break. Before you spring a leak in your data collection process, or your data gets clogged in your funnel you should have a plan for keeping your data flowing. You could have saved yourself a lot of headaches, money, and time if you'd signed up for the general maintenance plan and addressed these issues sooner.




Data and plumbing

Chris put this visual together that helps illustrate all the potential touch points where your data can break. Your data is like water. It flows and flows and keeps flowing, even if you have broken connection points. When your marketing funnel is broken, the data leaks and often cannot be retrieved. If you have broken connection points and data that is leaking or not flowing at all, your reporting won't be accurate and you cannot make decisions.

I get it, it's easy to ignore issues that aren't emergencies. It's also hard to think about issues you can't see. If your basement isn't filled with water you're probably not thinking about calling a plumber. If you still have some reporting to work with, your data can't be that bad. Right? Well, no. Bad data and leaking pipes should be addressed sooner rather than later before you're ankle-deep in septic water.

This is what Trust Insights does. We're your plumbers. Instead of crawling around under your house with spiders or navigating pools of water in your basement, we'll get into the configuration of your systems and make sure your systems are talking.

My goal with this story was not only to help show what we do but also to help you understand why you need to take care of your data. It's the foundation of your business. It's the way you make decisions. You cannot live without water, treat your data the same way.

Ok, that was a little dramatic but you get the point.

How do you take care of your data?

Come tell me about it in our free Slack group, Analytics for Marketers »

***- Katie Robbert, CEO***

## September 14, 2022

## Process Is Not The Enemy

So you want to be agile? You want to be able to pivot quickly. You want to drop everything and switch tactics at a moment's notice.

It's not as easy as it sounds but it is attainable. There are people and companies that put a lot (and I mean A LOT) of work into making agility look easy and effortless. With some deep breaths and preparation, you too can make being agile look effortless. Let me tell you how.

Last week my husband happened to have two days in a row off. If you know me, you know this is rare. We decided to drop everything and go camping two states away. We both have jobs, responsibilities, and people who count on us daily. But we went, and the world didn't end.

How? The same way you can be agile and efficient with your marketing.

I can hear the collective groan because you know what's coming next. Yup, the 5Ps.

Specifically the third P - Process. And there go the eye rolls.

It sounds counterintuitive but the more process you have, the more agile you can be. The easier it is to pivot in a different direction.

I'll say that again. The more process you have, the more agile you can be. There is a misunderstanding that process slows you down and creates overhead. This is true of process that is not thought out and had no clear purpose.

However, purposeful process is not your enemy. Process is not meant to bog you down. Process makes you more efficient. Process creates predictable and repeatable outcomes, allowing you to focus elsewhere.

Take your marketing, for example. If an executive came to you, out of the blue, and asked you to create a different campaign than you've been planning and executing, and wants it in 48 hrs, could you do it?

"Process" is another way of saying "routine" which is another way of saying "habit". We're really talking about what habits and routines you have in your marketing. See? Not so scary.

When I worked in software development we were rigorous about using Agile Methodology. We had our daily stand-ups (scrums), we had two-week sprints, sprint planning, and backlogs. We worked hard to not deviate from the process so that we could stay agile. I told you it sounds counterintuitive.

But by sticking to the process, things became second nature. We knew how long tasks would take. We knew what the tradeoffs of features would be. We knew how to navigate and manage expectations of product releases. This meant that when someone came to me with a feature request, I could be agile. I could work with the team to shift priorities and trade out features for what was being asked. Then we started the processes all over again. The feature that we traded out went into the backlog, was re-prioritized, discussed at the sprint planning, and executed during the sprint. Every time we finished a spring we would evaluate the process to tighten it up, to make it more efficient.

When I went camping last week, I already knew what tasks I needed to get done ahead of time, what I could delegate, and what could wait a day. We have a very tight process for content creation, general marketing, and operations. This allowed me to act in an agile way, moving tasks and priorities around without much fuss.

Additionally, all our camping gear was already packed. I knew where everything was and exactly what we needed for an overnight trip. I have lists and I have a visual map of how to pack the car so that there is room for everyone. I also have after-camping processes which include laundry, re-packing, replacing used supplies, and updating lists. When we get back from each camping trip, we talk about what we could have improved on so that we can spend less time packing and cleaning, and more time relaxing. Kind of like an after-action review. Interesting how that works.

Now, back to your marketing. How much of what you do is a routine, a habit? How much of it is repeatable? If you're asked to swap out a campaign, do you know what it will take?

As we are rapidly approaching the last quarter of 2022 this is when you can make changes to your process for the upcoming year without anyone batting an eye. Take advantage of the end-of-year planning chaos to evaluate whether you have all your processes in place to set you up for success. Ask yourself, "is it process for the sake of process, or is it purposeful?" Let's be honest, people are always going to ask for something other than what you have planned. Wouldn't it be nice if it didn't give you a heart attack every single time?

Want to talk about your process?

Come tell me about it in our free Slack group, Analytics for Marketers »

***- Katie Robbert, CEO***

## September 21, 2022

## Using AI for Content Creation

I am not a technical person.

Strike that. I am a technical person in the sense that I understand it. I am not a technical person in the sense that I do it.

Until now.

As we're thinking about the future of Trust Insights, we know that we need to continue to make artificial intelligence more approachable to non-technical marketers.

So, here I am. At your service.

I'm going to be working on trying to create processes around using artificial intelligence to scale your marketing, even if you're not a data scientist or engineer.

Here's my first pilot - content creation.

Yes, I am up to speed with Google's helpful content announcement and that there will be penalties for AI-created content.

You can read the full update here.

Part of the issue that we have at Trust Insights is being able to scale. We're a small team. We like being a small team. But there are tradeoffs that come with being a small team. For instance, I don't have as much time as I would like to create more content. Content is what help (us) drive more awareness and that is where our funnel is the weakest.

So here I am, trying to figure out if I can use AI to scale my content marketing. Today, I'm trying open.ai.

What takes me the longest is getting started. I have my machine learning keyword list. I have my predictive content calendar. I know what I should be writing about but most of the time it's getting started that trips me up. If AI can help me with that, I might find myself with more time to create even more content for our awareness stage.

What I am piloting is if AI can help me get started faster, so that I can create more high-quality content in the areas that we need more awareness. Here is my first test. I gave open.ai this prompt:

*Write a five-paragraph summary about why marketers should be using artificial intelligence:*

And this is what I got back:

*Artificial intelligence is a field of computer science that deals with the creation of intelligent agents, which are systems that can reason, learn, and act autonomously. AI has been used in marketing for some time now, but its potential is still not fully realized. Here are five reasons why marketers should be using AI:*

*1. AI can help you personalize your marketing messages.*

*2. AI can help you automate your marketing tasks.*

*3. AI can help you create better customer experiences.*

*4. AI can help you make better decisions.*

*5. AI can help you stay ahead of the competition.*

You know what? I can work with this. It's not how I would write it but I can use this as a starting point. My next step is to edit this content so that it's in my voice and aligns with the messaging that Trust Insights puts forward.

You know how your stakeholders will give you a blank stare when you ask them what they want but are full of opinions when you give them something to react to? That's essentially what I'm trying to do for myself. My goal is one new piece of content a week using this process.

If this process is repeatable and helps with our SEO then I know I've got the win! Plus, I get to write a process. So, that's a win for me. I'll keep you posted on what happens - and don't forget to check out our blog to see if you can tell which pieces I used AI to write.

Are you using AI to help you write your content?

Come tell me about it in our free Slack group, Analytics for Marketers »

***- Katie Robbert, CEO***

## September 28. 2022

## Five Failure Points of a Measurement Strategy

A few weeks ago I gave a talk on the five failure points of a measurement strategy. In that talk, I covered the 5Ps of Change Management and how to identify and avoid these failure points. Here are the main takeaways.

- Purpose - What is the question you're trying to answer?
- People - Who are the stakeholders and what do they care about?
- Process - How are you collecting your data and maintaining integrity?
- Platform - What tools are you using to Collect, Analyze, and Report?
- Performance - How do you know if you successfully created the right plan(s)?

### Why is PURPOSE a failure point?

Because quite often we don't clearly define the question we're trying to answer. Conversely, we're trying to answer too many questions and a single measurement strategy isn't going to do it.

A #protip from me to you - it's ok to have more than one measurement strategy if you are answering more than one question. This can manifest into a book of reports, a PowerPoint deck with one set of data to answer one question on each slide, or different tabs in a spreadsheet. The point is this; one set of data to answer one question. Be clear with your purpose and don't overcomplicate it.

### When are PEOPLE a failure point?

Well, where do I begin....anywho. People are a failure point for a couple of main reasons. The first one is that they don't know what they want. They aren't focused. Giving the strategy a purpose helps to reign in distractions. The next reason is that they weren't asked in the first place. How do you ask people what they want? You guessed it - a user story!

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

The "persona" being your stakeholder, the "want to" being the intent, and the "so that" being the outcome.

For example: As a CMO, I want to understand which channels are performing, so that I know which channels are driving leads.

You can generate as many user stories as will help you understand the purpose better.

### Why is PROCESS a failure point?

Generally, the lack thereof. To have a successful measurement strategy you need to have a process for how you're going to collect, analyze, and report your data. A good starting place is the 6Cs of data quality. These are:

- Clean: prepared well and free of errors
- Complete: no missing information
- Comprehensive: must cover the questions being asked
- Chosen: no irrelevant or confusing data
- Credible: must be collected in a valid way
- Calculable: must be workable and usable by business users

Taking the time upfront to set up a repeatable process for your data quality will set you up for success in the long run.

### Why is PLATFORM a failure point?

According to the MarTech9000 there are literally over 9000 platforms to choose from. Your purpose and your user stories will help you narrow down the choices. You need three basic platforms. One to collect your data, one to analyze your data, and one to report your data. You can try to find a platform that does it all, but in my experience, this unicorn doesn't exist to do exactly what you need it to do. Maybe it does for you. It doesn't for me.

### Why is PERFORMANCE a failure point?

This is where you check your homework before you turn it in. This step, like the ones above, is easy to skip. You made the plan, you set up the spreadsheet, and you're done, right? A better plan is to walk back through the first four Ps:

- Go back to your PURPOSE– did you answer the original question?
- Go back to your PEOPLE – did you meet those user story requirements to answer the question?
- Go back to your PROCESS – did you create a repeatable process to answer the question?

- Go back to your PLATFORM – did you use the right one(s) to answer the question?

Whether it's end-of-year planning or you're just starting a new mid-month campaign, you can follow the 5Ps to set yourself up for success. It doesn't need to be an exhaustive exercise, just make sure you can answer these five basic questions:

- What is the purpose of this strategy?
- Who are the people involved in this strategy?
- What is the process to ensure we can execute this strategy?
- What are the platforms needed for this strategy?
- What is the performance metric that helps you know you're successful?

What are your methods for setting up a measurement strategy?

Come tell me about it in our free Slack group, Analytics for Marketers »

***- Katie Robbert, CEO***

## October 5, 2022

## Using Business Cases to Make Strategic Decisions

I don't know about you, but I have a love/hate relationship with end-of-year planning. Or any planning exercise for that matter.

I love planning because it's an opportunity to review what you've done, what you've done well, and where there is room for improvement. And then comes the fun part, reacting to all the data and coming up with ideas for what to do next.

But then…

…you have a whole pile of ideas and it can feel overwhelming. That's where we are right now. We have a lot of good ideas but now we have to go through the exercise of winnowing down the list, prioritizing, and creating plans around each idea from execution to measurement.

You thought I was going to say to use the 5Ps, didn't you?

Well, you would be right.

The 5Ps in this context is a mini business case.

We know that for Trust Insights our main priority for 2023 will be awareness. We need to bring more people into our ecosystem, and let them know who we are and what we do. We need more prospects at the top of our funnel.

The other side of that is that we're still operating with limited resources and talent. For us to achieve our goals, it's pertinent that we stay focused and choose the tactics that are going to yield the best results.

Ok, enough chit-chat. Let's get into it.

For the sake of this example, let's say option 1 is to generate more blog content, and option 2 is more public speaking. And in this example, I only have the bandwidth to do one of these things, not both. How do I decide? Let's run down the 5Ps for each.

### Write more content

- Purpose: To enhance our organic search results and drive more traffic to the website
- People:
    - Internal: Me, Chris, and a contractor.
    - External: Marketers on the internet that are using a search engine to find specific keywords and topics
- Process: Use the predictive keyword calendar to generate topics and write at least three posts a week (to start). Someone will write/edit/schedule the posts. Once the post is live, share it on social media.
- Platform: Open AI (or a similar tool) to help get the post started. Google Docs to write the post. WordPress to host the post. Agorapulse to schedule the post on social media.
- Performance: XX% increase in site traffic, XX% increase in TOP prospects

### More public speaking

- Purpose: To drive more awareness and traffic to the website by demonstrating expertise
- People:
    - Internal: Me, Chris, our virtual assistant (VA).
    - External: Event attendees
- Process: VA to research and pitch events with our topics. Speaker to create a speaking deck with any associated materials. Speaker to give a talk at an event. Travel as needed.
- Platform: The internet for research. Google slides for creating the talk.
- Performance: XX% increase in site traffic, XX% increase in TOP prospects

When I look at these two options side by side, a few things stick out to me. The addressable audience with content creation is larger. The risk with the event audience is that it could be the same audience over and over. Ideally, we would reach a new audience but we don't know that for sure. We also need to convince event coordinators that we are the right speakers. With content creation, as long we do our due diligence with planning, we should be able to reach our correct audience when they are looking.

So, does this mean we can't look for more public speaking opportunities? Not at all. It is still an important tactic to drive awareness. However, we should spend our time generating more helpful content and publishing it on our website. And if we rethink it, our content creation could be a tactic that leads to more public speaking.

Ok, friends. It's time to wrap this up. I have a lot of business cases to write and decisions to make.

Do you know someone that should know about Trust Insights?

Invite them to join our free Slack group, Analytics for Marketers »

***- Katie Robbert, CEO***

## October 12, 2022

## People Are the Most Important

I focus a lot on the 5Ps (Purpose, People, Process, Platform, Performance). Maybe to an annoying point. Today, I want to deep dive into the most important P - People.

Why People? People are the common thread through each of the Ps, through everything we do. Sure, each of the Ps relies on the others, but they are all dependent on People. Without People, the rest of the framework falls apart.

People set the Purpose. People establish the Process. People choose the Platform. People determine the Performance.

When put that way, it sounds really straightforward. People are at the center of all of it. So why am I so focused on People? Because that's where most companies get it wrong. They forget about the People.

Why? Well, I don't believe that companies go out of their way to not factor in People, it's more of an unconscious omission. The flip side of that is that perhaps they do factor in People, but not at a deep enough level.

Let's say you want to do even better. You want to make sure you're factoring in the most important part of your planning. You want to make sure People are completely represented. Let's walk through what that looks like.

### People determine the Purpose.

At the end of the day, you're doing something to solve a problem. And those problems are People's problems, or rather, problems created by and experienced by People. You can use your Purpose statement as a hypothesis, or you can do the research to better define your Purpose. The point is, that your purpose is a problem that people are having and that you can solve. If your Purpose is to increase your marketing leads, you're talking about understanding how to reach people with your solutions to their problems. If your Purpose is to automate your reporting, you're talking about removing redundant tasks so that People have more time for meaningful tactics. You're also trying to get access to information faster, giving People what they need to make decisions.

**People determine the People.**
This sounds redundant, but it's not. If one person is deciding the plan then they haven't factored in all the right people. Who are you solving the problem for? Who needs to solve the problem? This is where having a variety of user stories is helpful. You can understand the Purpose from multiple perspectives. Limiting who you think the People are will limit your ability to be successful. When thinking about the problem you're trying to solve, ask for lots of feedback on potential solutions.

**People determine the Process.**
You may have automation, but People program the scripts that run the automation. So, you're back to needing People. People need to create, audit, and maintain the Process. People will determine if something changes and the Process needs updating.

**People determine the Platform.**
Even if machines ingest the data and analysis, there is a component that People need to understand. The machines are not making the decisions, the People are. You want to choose a Platform to collect, analyze, and report your data. This could be one or this could be three Platforms. But People make the decisions about what to use to solve the problem, the Purpose. Because at the end of the day, People need to use the Platform. It only makes sense that People would choose it.

**People determine the Performance.**
A piece of tech won't tell you if something was successful. You can program it to give you the output, but People determine whether it was acceptable. This should tie back to the Purpose. Did you solve the problem for People? Just like People program the Process and choose the Platform, People determine the Performance.

This was a bit of a tongue twister, but the point I'm making is that even when you think you're factoring in People, take another look. And then look again. Selecting a new piece of technology won't solve a problem if you haven't talked to your team or if you haven't talked to your audience. It just becomes a bandage. It might stop the bleeding but it won't heal the wound. You need to dig deep into the real problem you're trying to solve before deciding on a solution.

Do you factor in your people enough?

Tell me about it in our free Slack group, Analytics for Marketers »

***- Katie Robbert, CEO***

## October 19, 2022

## Taking Care of Yourself at Events

I have a gift for you. I am going to skip talking about the 5Ps this week.

Don't worry, I'll be talking about them next week, probably.

Anywho, last week I attended the MarketingProfs B2B Forum in Boston last week. That's what I want to talk about.

I don't want to share what I learned and took away from a marketing perspective, but rather from a human perspective - which in my opinion is just as important.

It was my first in-person event since February 2020. The last time I traveled was in January 2020 when I flew to France to speak, and then in February 2020 when I did a session at UMass Boston.

Needless to say, I was anxious and out of practice. I know I'm not alone there. It was the first in-person event for a lot of the attendees, not just me. We all had to figure out how to navigate our own personal safety protocols, remember how and when to approach people, and most importantly enjoy ourselves.

But it was exhausting. I'm an introvert and prior to the pandemic, in-person events exhausted me. I was talking with a friend at dinner and he was sharing how excited he was to be back in person because he gets energized from being around people. I told him that I was envious because I'm the opposite in every way. He said that for someone like him, the pandemic was especially hard because he never experienced real isolation and loneliness until then. That was hard to hear and I was excited that he was excited to be among the masses again.

I arrived Tuesday night at the hotel, found my tribe to have dinner with, and then went to bed about three hours later than I usually do. The next day I got up around 5:30 am to do some yoga, shower, and get ready. After making my way down to the event floor Chris and I got ready to teach a workshop for the next eight hours. Yes, you read that right. Once we finished the workshop, I went back up to my room for a quick break before heading back down for a mixer and then dinner. Once again, talking with people for a couple of hours, caught up with new and old friends, and then went to bed way later than I usually do. During this entire time, there were people talking to me and around me. I was present in conversations while also taking in everything else that wasn't the same four walls of my home office. It was a lot. Most days I am alone in my house with my dog while my husband is at work. It's quiet. Very quiet. It's what I'm used to and what I enjoy.

By the time Thursday rolled around, I was spent. There were still two full days left of the event and I was still signed on to speak one more time on Friday. I needed a break. I needed to go home. So I did. Now, I had the luxury of living in the same state as the event and Massachusetts is not very big. I was able to spend the evening with my family, wake up in my own bed, and get ready in my own house. I then headed back to the event to catch up with my friends and then speak one more time.

You might be wondering what the point of me telling you this is. Well, here's the point. Whether you're an introvert or extrovert, navigating the real world again can be hard. It can be hard in the best of times, and it's hard now with so much uncertainty floating around us.

The point, and what I learned, is that it's ok to say no. It's ok to bow out, take a break, and go home. It's ok to know your limits, to shut down, to turn off. I learned that I don't have the physical and emotional stamina to be around large crowds the way that I used to. I would get fatigued prior to 2020 at in-person events, but it's worse now. I equate it to endurance training. You have to do it all the time to keep your physical strength. If you take two years off from training, your performance will suffer and you'll have to build back to where you were. That's where I'm at now. My stats have gone down and I have to build them back up.

I share this with you because, at the end of the day, you are all that matters. You have to put your needs first. If you work for a company that sets expectations about your event experience and how many new connections you'd be making, make sure that those expectations align with your own reality. Be sure to build in breaks if you know you'll need them. Build them in even if you don't think you'll need them.

As you re-enter the world of in-person events don't forget to take care of yourself. You might be a little rusty and that's ok, we all are.

Are you starting to attend events again?

Tell me about it in our free Slack group, Analytics for Marketers »

***- Katie Robbert, CEO***

## October 26, 2022

## How Do You Build Trust?

How do you build trust? Consistency. Let me explain.

A question I get asked a lot is, "How do I delegate more?"

Which is usually followed up with something to the effect of "I don't trust that anyone can do it the way that I can".

Sound familiar? Yes, me too. I've been there.

Today we'll focus on the 2nd and 3rd Ps. People and Process. I'll also introduce the 6th and most overlooked P, Patience.

Trust, at its core, is the belief that someone will do what they say they will do. They tell you the truth, even when it hurts to hear. Think about the people that you trust in your own life. If they say they will meet you somewhere, or show up at a certain time, they do. They have demonstrated that they will follow through, or communicate with you if they can't. And they do this over and over and over. And when someone breaks your trust it's because they didn't do what they said they would.

Now with that in mind, think about your team and the statement, "I don't trust anyone can do it the way that I can" - which leads back to "how do I delegate more?" This is a solvable problem.

First, let's get back to trust. Trust isn't all or nothing. It's a spectrum. There are levels of trust that you can have with people. There are people you can trust to get your coffee order right, and then there are people you literally trust with your life - and everything in between. When thinking about your team, you probably need a level of trust that falls in between a coffee order and something that is life or death. You want to be able to trust someone to execute your plan on your behalf the way that you would.

So how do you do this? Hint, I gave you the answer earlier. And if you're thinking to yourself, there is no way I can trust my team to do what I do - please keep reading.

Process. That's the key.

Whaaaat? That sounds so simple!

That's because it can be. Process is the key to building trust with your people. Building trust starts with you, not with them.

You, the person that needs to trust, need to build a process. You need to document what you do and how you do it. You need to set clear expectations on what you want and when you need it. These tactics are why trust doesn't happen. Not because the team can't execute, but because you didn't give them the tools to be successful.

Remember when I said the people you can trust are the people who tell you the truth, even when it's hard to hear? You can trust me. I am telling you that you're the reason you can't trust your team.

Now, are there instances where people lie, cheat, steal and burn bridges? Of course. I'm not naive. But that's not what this particular post is about. I do want to acknowledge that even when you give someone everything they need to be successful they can't or won't be. But that's a topic for another day. I promise to cover it at length.

Back to the point - you.

In order to start the process of trust building so that you can feel comfortable delegating, you need to determine what it is that you need from other team members. Once you know what that looks like, communicate it to them and give them a chance to try it out and make mistakes. If you have something you're struggling to delegate it's likely because you have taken the time to practice and perfect it to your liking. You need to give others the chance to do the same. This also takes time. Be patient. If you want to delegate today and want something perfected yesterday, you and your team are not set up for success. You're going to fail. Patience is HARD. I know. I can be very impatient. But when you are training and building up your team, you have to find even a kernel of patience. Otherwise, this will be a waste of your time and theirs.

I have found that the most successful relationships start with this process. It starts with you, defining the process for the tactic, documenting it, and communicating it. You set the expectations and then follow through with constructive feedback. Lather, rinse, repeat. Building trust takes practice and consistency from both sides. Trust is not a one-way street. Your team needs to trust that you have given them all the information they need to be successful. And like any relationship you have in your life that is good and trusting, it takes consistent work. And patience.

Now go out there and delegate this shit out of your tasks!

How do you build trust with your team?

Come tell me about it in our free Slack group, Analytics for Marketers »

***- Katie Robbert, CEO***

## November 2, 2022

## Creating User Stories to Gather Requirements

You don't need yet one more opinion on what's happening on Twitter, right? I didn't think so. In that case, I'm going to talk about how we are creating user stories to gather our own requirements.

I've been struggling to get a handle on my sales data. We have a CRM but because we're a small business I cannot afford the tier that would allow me to do any kind of custom reporting. Our CRM allows for basic functionality at the moment, such as collecting prospect data and tracking deals. I've been scratching my head, trying to figure out a solution to this. These are some of the options I considered.

Do I switch CRMs? That's a pain in the butt for a couple of reasons. First, I would need to evaluate my needs and write up my requirements. Next, I would need to evaluate the different CRM options. This might mean talking to other salespeople, sitting through demos, and all that good stuff that I can't focus on right now. Last, I would need to create a migration plan for all my data and an official rollout for the new processes for data collection on the new platform. Ok, so that's not an ideal solution.

Maybe I can download the data and merge the different tables using Excel? I would need to first make sure that all the different tables in the CRM are connected with some kind of ID. Then I would need to develop a process for downloading the data, cleaning it, and then merging it. Then I need to create a static report and make some decisions. Another not ideal solution since this one would be time-consuming and error-prone.

After talking to Chris, we determined that he could extract data from the CRM's API, bring it into Big Query, and build reports in Looker Studio (formerly Google Data Studio). Automated data extraction and reports? That could work. First, I would need to figure out what I need before Chris starts extracting the hundreds of data points.

How did we proceed, you ask? If you guessed user stories, you get the gold star for today!

Chris and I hopped on a video call last Friday and talked through about 25 different user stories. Why so many? Because I had different questions that I wanted to answer. Going through this exercise did a couple of things. We were able to narrow down the data points that we needed to extract from the CRM. We were able to focus the purpose of each of the reports we would build. We were able to determine which tables we needed data from. We were able to see where there was an overlap between user stories.

Fun fact, a single user story hits all the 5Ps.

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

- The [persona] informs "people".
- The [want to] informs "process" and "platform".
- The [that] information "purpose" and "performance".

If done correctly and thoughtfully, a single user story can tell you just about everything you need to know to move a project forward.

Here is an example of some of my user stories for building reports with our sales data:

- [1] As the CEO, I want to get a weekly sales report containing deal age, so that I know where opportunities stand.
- [2] As the CEO, I want to know what services we're selling to most, so that I can hire contractors for those services.
- [3] As the CEO, I want to know the source of a deal, so that I can align our efforts with our digital marketing activities.
- [4] As the CEO, I want to know when a deal in the pipeline was last contacted, so that I can work with biz dev on outreach.

The user stories are not overcomplicated and the goal is that each one was a single purpose.

What's next? Chris will write code to extract the necessary data points into Big Query. Once we extract the data on a regular basis using automation, we can build the reports in Looker Studio. I've requested that each user story is on its own page in a book of reports, listed at the top so that it's crystal clear what question is being answered. In my view, it's ok if there are redundant tables of data. Each user story is its own question and when I am looking for the answer to that question, I can easily find it. Honestly, I can't wait to start using the data to make decisions.

Are you using user stories to gather your requirements?

Come tell me about it in our free Slack group, Analytics for Marketers »

***- Katie Robbert, CEO***

## November 9, 2022

## Voice of the Customer

Social media is a mess. Data privacy is getting more stringent. Budgets are getting cut left and right. How are marketers supposed to know what their audience wants and deliver content and campaigns that resonate?

In 2020, [I wrote this 4 part series on the Voice of the Customer].

Today, I want to [focus on part 3 - where you can get your data from].

The voice of the customer is data that represents what the customer wants, needs, and expects. Right now, too many brands are reliant on cookies and social media to try and understand their audience's interests.

A million years ago when I was a product manager, my role focused on giving customers what they wanted in collaboration with the vision of the company stakeholders. Unfortunately, what the customers needed and what the company wanted to do did not align. When I say it did not align, what I mean is they were not even in the same orbit. My marketing team was fighting hard to create a Voice of the Customer program so that we could learn what we weren't delivering. My stakeholders wanted to set up fancy dinners for prospects. We got too wrapped up in designing the perfect Voice of the Customer program that we lost sight of what was important, the customer. Needless to say, we never got to the root of the product issues. We also didn't look at what was right in front of us. The data.

So, here is my gift to you. If you're concerned about recent and upcoming changes to your Marketing TechStack and your ability to understand your customer, here is a list of alternative data sources:

- Face-to-face interviews
- Focus groups
- Market research surveys
- Observational data (watching the customer, shadowing the customer)
- Customer advisory boards
- Environmental and landscape data collection

- Conferences and trade shows
- UI/UX data collection
- Search intent data
- Sales data
- Customer support data
- Private communities

This is not an exhaustive list but it should get you started.

Here's the thing. If you give people the information they need to consent, aka - how will we use your data - you won't have a hard time collecting this information. You will have willing participants. You also don't need to design an elaborate Voice of the Customer program. You simply need to start listening. And I mean really listening. This is not the time to solve problems and go in with a hard sell and solution. Listen. Let your customers and audience be heard. Give them space and time to articulate what's going on and what they need from you.

Right now is a great time to pivot how you're collecting audience data. Start small. Send a quick "how are we doing" email to your existing customers. Reach out to your prospects and ask them to talk to you for 10 minutes. As mentioned above - this is NOT about selling them something. Make that crystal clear when you're asking for someone's time. The more they trust you, the more they will open up and tell you valuable information. Do not ruin that trust by bringing your own agenda into the conversation.

If you don't have the resources to talk to people, take a look at search intent data. How are people finding you, what queries brought them to you? Look at your audience interest data in your web analytics.

The point is that you have a lot of other options when it comes to understanding your audience. If you're still holding out hope that public social media will be the answer, you're already falling behind.

Are you collecting and using VOC data?

Come tell me about it in our free Slack group, Analytics for Marketers »

***- Katie Robbert, CEO***

## November 16, 2022

## Contextual Content

The past couple of weeks we've been talking about data privacy, the voice of the customer, and personalized marketing experiences.

This week, I want to try and tie it all together with contextual content. Contextual content is just a fancy way of saying content that people want based on their interests.

A few months ago I wrote about using the data you collect in Google Analytics to create more personalized experiences. You can read that post here.

Earlier this week, we decided to ask our Slack Community, Analytics for Marketers, what their hobbies outside of work are. Within a few minutes, we had a whole thread of responses ranging from cooking, to reading, to board games, and making music.

Well, that was easy, right?

In reality, we've been working to create and maintain this community for a couple of years. We've built the trust and respect needed to allow members to be so readily open and honest.

Now, let's talk about you. What if you don't have a community that you can ask? You likely have customers, past and present. We can start there.

I asked Chris on this week's podcast, "Isn't it weird to ask your customers what they do outside of the context of purchasing your products/services?" Chris responded, "Not if you tell them exactly how you're using their information."

Ok, so let's say you've explicitly told your audience how you'll use the information and they have agreed to hand it over. Now what?

Well, now you need to start creating!

Sounds easy, right? You have all of the pieces so like a Lego set you just put it together. Well, hold on. You still need to create valuable content and now you're tasked with weaving in something that may not be at all related to what you do. Kind of like mashing all of your toy sets together as a kid to make one cohesive story.

Let's take cooking as an example. At Trust Insights, we do a lot of consulting around data science, organizational behavior, and marketing analytics. Not a whole lot to do with cooking. You might notice that Chris uses a lot of cooking analogies to help explain things, but that's not the same as creating content around cooking and data science.

Maybe the approach is to look at brands like America's Test Kitchen and research how they approach cooking. As a fan, I know that they incorporate a lot of precise measurements, science, and chemistry into each recipe and episode. This is similar to how Trust Insights approaches analytics. To relate to my audience that also enjoys cooking, I could introduce (or reintroduce) them to cited works by America's Test Kitchen and show how ATKs approach is similar to that of Trust Insights. Baking, as a practice, is a science. Trust Insights talks about the scientific method. Perhaps I could do a series on breaking down the process of baking using the same frameworks that we use for our analytics projects.

It's not enough to just say "we're cooking with data!" and assume you've created contextual content. You need to dig deeper and really understand the interest. Then you can bring it back into your services and products. Create something that you'd read. Share it with people who have the interest but aren't customers and get their feedback. Did they find it valuable? Did they learn something new about you? Did you create interest enough that they would read more from you?

Try it out, see what works.

Are you creating contextual content?

[Come tell me about it in our free Slack group, Analytics for Marketers »]

***- Katie Robbert, CEO***

## November 23, 2022

## Thanksgiving 2022 Edition

For those of us in America, we wish you a safe, happy, and healthy Thanksgiving. From all of us at Trust Insights, we're grateful for you and the community you've helped us create.

Thanks to your support this year, we've made recurring donations to the [Greater Boston Food Bank] and the [MSPCA] to help each other and our non-human friends through tough times. We'll continue doing this as long as we're able.

As is tradition, we'll share with you some of our favorite ways that we use up our leftovers. This year we reached out to our community for their favorite recipes. Here's what they told us:

### Andrej's Thanksgiving Leftover Turkey Tortilla Soup

- 3 chopped onions
- 3 sliced jalapeños
- 3 cloves garlic
- 1 Teaspoon oil
- 1-4 Tablespoons chili powder
- 2 Tablespoons cumin
- 1 Tablespoon salt
- 1 Can (16 ounces) tomatoes, undrained
- 6 Cups TURKEY BROTH or reduced-sodium chicken bouillon
- 1 Package (16 ounces) frozen succotash or corn
- 2 Cups COOKED TURKEY, cut into 1/2-inch cubes
- 1 bunch chopped fresh cilantro
- Tortilla chips, coarsely crumbled
- Grated Monterey Jack cheese
- Sour cream or yogurt
- Avocados
- Limes

In 5-quart saucepan, over medium heat, sauté onion, jalapeños and garlic in hot oil 3 to 4 minutes or until translucent. Stir in spices; cook 1 minute. Add tomatoes, breaking up with spoon. Stir in turkey broth; bring to a boil. Add succotash and turkey, reduce heat to low and simmer 5 minutes.

Serve with tortilla chips, cheese, sour cream or yogurt, hot sauce, cilantro, limes and avocados.

### Stuffing Crust Turkey Pot Pie

Analytics For Marketers Community Member Leslie mentioned that her favorite way to use up leftovers was to make turkey pot pie. Here is a recipe you can use.

And just to switch it up, John sent me this Instagram reel for making Turkey Bacon Cheddar Sliders. You can watch that here.

How do you use up your leftovers?

Come tell me about it in our free Slack group, Analytics for Marketers »

Have a safe and healthy holiday!

***- Katie Robbert, CEO***

## November 30, 2022

## How to Fix a Weakened Community

How do you fix a weakened community?

A few months back, I wrote this post about learning how to run a community. You can read the post here: [https://www.trustinsights.ai/blog/2022/10/lessons-from-an-accidental-community-manager/](https://www.trustinsights.ai/blog/2022/10/lessons-from-an-accidental-community-manager/)

I focused that post on starting a community. Chris recently posed the question, what happens when things break?

*"Well, in the context I was looking at, it was a community (not this one) where the culture was foundering because the moderation team was at odds with each other. Factions had broken out, and infighting was common - and very public. As a result, the community itself was significantly weakened. A lot of valuable members left."*

And then his follow-up question:

*"So what do you do to [a] prevent that from happening in your community and [b] how does a community recover from a massive, public split?"*

How do you prevent a weakened community?

**1) Set roles and responsibilities**

For Analytics for Marketers, I own and run the group with Chris and John. We are responsible for setting the guidelines and the culture. We've worked hard to have a single voice for daily posts and to create a space where asking questions is safe. If any of us were to suddenly leave, or if we brought in more leadership, what we've built would inevitably change. There would be a new variable. To keep the community status quo, we would need to revisit roles and responsibilities. From there, we would create a communication plan for the members. As members, they have expectations of us and we should be forthcoming with them of major changes.

**2) Be consistent**

This is a piece of advice I find giving most often. Since we started asking a Question Of The Day (QOTD) almost a year ago, we've seen engagement increase substantially. I schedule it to drop on weekdays at 10 am EST. This way, community members know when to look for it. When things are shaky or uncertain, people look for predictability in their lives, things they can rely on. By staying consistent in your community you are providing predictability to your members that count on you. If you change the cadence or the culture without any warning, you're likely to see attrition.

**3) Don't take yourself so seriously**

We have what is now known as the great pineapple debate (thanks, Justin!). We can't be all business all the time. We need to give people a chance to breathe and laugh. In this instance, we took a moment to ask people about unpopular opinions. I had no idea it would devolve into a debate about whether pineapple belongs on pizza (it doesn't btw) but yet it turned into one of our most engaging posts. If your leadership team is in crisis, give your members a reason to stay, even if it's to talk about food. I still see members reference the pineapple debate a few months later. This is a great way to gauge how strong your community is, even if the leadership can't get their act together. If you start losing members over pizza toppings, take the loss and move on.

**How do you revive a weakened community?**

Now, if you find yourself in a situation where the members are being disrespectful and the moderators are fighting you have a larger issue. Just like an organization, culture is set from the top down. You need to lead by example.

Let's say you find that your moderators are causing the issues. The easy solution is to get rid of them. However, you still need someone in charge and the community still needs structure.

**1) Community Ambassadors**

These are people that are high profile, engage with your content, and encourage and help other members. Ideally, you would have these members identified before things go sideways, but if not, you can seek them out during the aftermath. Give these ambassadors expectations around their roles and responsibilities. Make sure they know what your ground rules are and that they have the tools they need to help other members adhere to them.

**2) Givers and takers**

One of our community members, Hannah, mentioned that you need to be aware of different types of members - givers and takers. When you're trying to re-energize a community after some kind of scandal or crisis, be aware of those that show up just for the drama. These aren't going to be valuable members. These are the takers. To the above, your ambassadors are your givers. They are the folks that will help you keep things moving forward, focusing on the positive and quieting those that just seek the car crash. If you see an uptick in members right after a public crisis, they are probably there for the wrong reasons. These are the members you need to pay attention to as they may try to perpetuate the issues.

At the end of the day, a community is a living breathing thing. It's comprised of people that are watching and waiting, hoping to find a place to express themselves. If the culture turns toxic you'll have the people that want to watch it burn, and the people that up and leave. Make sure you have some kind of contingency plan that covers the scenarios listed above so that you don't find yourself with a fire that you can't put out.

Have you seen a weakened community turn things around?

Come tell me about it in our free Slack group, Analytics for Marketers »

***- Katie Robbert, CEO***

## Subscribe to Inbox Insights

If you've enjoyed these thoughts, get them straight from where they came from - our free weekly newsletter INBOX INSIGHTS from Trust Insights. Each Wednesday, CEO and co-founder Katie Robbert offers her insights into marketing, organizational behavior, and psychology, accompanied by unique data and analysis of marketing you won't find anywhere else.

You can subscribe here for free:

https://www.trustinsights.ai/newsletter

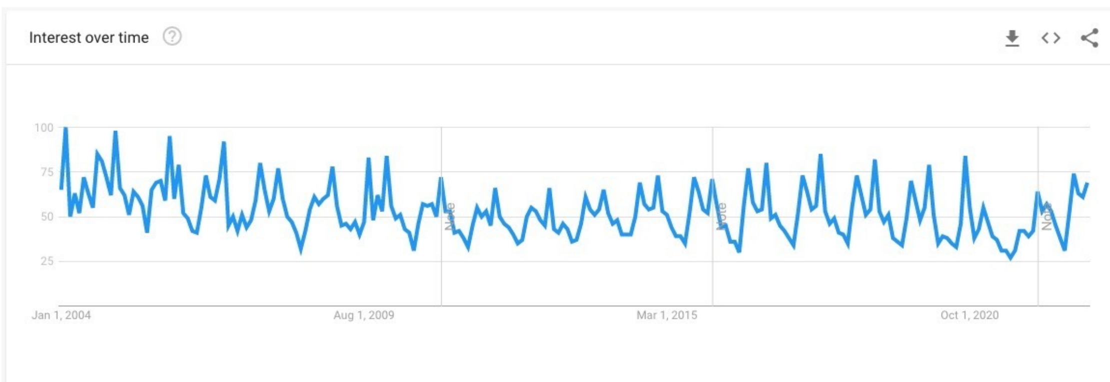
## December 7, 2022

## Goal Setting Is a Community Activity

It's the most wonderful time of year. You are getting spammed with health and fitness ads. I actually just got a DM on LinkedIn from a "fitness coach" that can help me reach my fitness goals. Yikes.

All of this to say, if ever there was a time of year where people set goals, both personal and professional, this would be it.

Oh, and here's the data - the peaks show Dec-Jan since 2004 of people searching for "goal setting".




December Google Trends for Goal Setting chart

Goal setting can be deeply personal for some people. Goal setting is also how businesses thrive and survive. But this post isn't about how to set a goal. This post is about what to do once you've set the goal and want to reach it.

Whether you have a personal goal or a professional goal, you need a community.

Let's say your goal is to compete in the Olympics. You may be the one training, but you're not getting there alone. You have a coach to guide you. You have a nutritionist to set a plan for you. You may have a team that you train with. You have friends and family to motivate you and cheer you on. That's your community.

Think about your business, your company, your team. You likely have goals that you're working on setting for the next fiscal year. Once those goals are set, how do you achieve them? With the help of your community.

Start thinking about the people around you as a your community, instead of staff or just people to delegate to. Consider it a mindset shift. It's a great way to get your team more involved, give them a sense of ownership and help with accountability.

This morning, I had a bit of breakthrough in how we, Trust Insights, would do a better job of reaching our goals. I may be the one setting the goals, but I am surely not the only one working to meet them. First, I talked with Chris about what the company needed from him. Then I talked with my right hand woman, Emilee, about what the company needed from her. I checked in with a good friend because I admittedly needed the reassurance.

I turned to my community to start the process of achieving the goals that have been set. I gave everyone sense of ownership and expectations. We're going to work together to meet our goals. Oh, and don't worry - John and I will connect soon too. He doesn't get out of this exercise!

Your community is going to be unique to you. My advice is to not try and go it alone. Activate people around you. Give them responsibilities, even if it's only to cheer you on. Just because you set the goal and will do the work the reach the goal, lean on those around you to support the goal and keep you accountable.

Do you have a community to help you reach your goals?

Come tell me about it in our free Slack group, Analytics for Marketers »

***- Katie Robbert, CEO***

**December 14, 2022**

**Words of Wisdom**

For the second to last newsletter of 2022, I want to leave you with these words of wisdom:

*"See a lot of times when we wanna be a boss, we too bossy. A real boss has employees around him that's better than him because he wants them to take his job one day. That's the real meaning of a boss, is "I want you to be better than me. I don't want to be better than you, I don't want to be the boss of you. I want you to one day be the boss so you can hire me so I can take a day off"."* - Snoop Dogg

This resonates with me for a few reasons.

There is a difference between being bossy and being the boss. When I was younger, I thought being bossy meant being the boss. I pushed people around, micromanaged, and was a total task master. I figured it meant that I was the boss and deserved respect. I could not have been more wrong. I was getting the exact opposite reaction. I wasn't taken seriously and I wasn't inspiring people to want to get things done when I asked.

After I got my ass handed to me time and time again (I was a little thick and took time to learn my lesson) I started to adjust my approach. I tried something radical, trust. This is the difference between being bossy and being a boss. Trust.

I've spoken about trust before. You can read that here 👉

If you trust your team to do what's asked of them, they will do it. Take it a step further. If you support your team, move roadblocks, and advocate for them, they'll succeed. Not just your team, but your friends and family too. You'll be amazed at how much more can get done.

This quote also speaks to your knowing own self confidence and worth. Surrounding yourself with people that you thing are better than you can be empowering. As a boss, your job isn't to be the best. your job to to activate and motivate. To set the course and let others drive. You cannot be the best at everything, but you can find people that are. You can bring those people into your team to help you achieve your goals.

ICYMI - last week I wrote about how goals are a community activity. You can read that here 👉

As you think about your own goals for next year, and the goals of your team members and community - think about this quote and ask yourself:

- How will you empower others to do more?
- How will you give up the spotlight to let others shine?
- How will you be the boss and not be bossy?

What quote inspires you and keeps you grounded?

Come tell me about it in our free Slack group, Analytics for Marketers »

***- Katie Robbert, CEO***

### Free and Paid Courses from Trust Insights

Paid Training Classes

Take your skills to the next level with our premium courses.

- 📊 Google Analytics 4 for Marketers
- 🔎 Google Search Console for Marketers

Free Training Classes

Get skilled up with an assortment of our free, on-demand classes.

- Empower Your Marketing with Private Social Media Communities
- How to Deliver Reports and Prove the ROI of your Agency
- Powering Up Your LinkedIn Profile (For Job Hunters)
- Competitive Social Media Analytics Strategy
- How to Prove Social Media ROI
- What, Why, How: Foundations of B2B Marketing Analytics

## Stay in Touch

First and most obvious - if you want to talk to us about something specific, especially something we can help with, **hit up our contact form**.

Where do you spend your time online? Chances are, we're there too, and would enjoy sharing with you. Here's where we are - see you there?

- Our blog
- Slack
- YouTube
- Twitter
- Tiktok
- LinkedIn
- Instagram
- In-Ear Insights on Apple Podcasts
- In-Ear Insights on Google Podcasts
- In-Ear Insights on all other podcasting software