



Intercom

Marketing

# Contents

- 04 Foreword
- 07 Introduction
- 11 Marketing in year one
- 19 Start with why: getting your story right
- 27 Marketing at a product-first company
- 38 Getting word of mouth for your startup
- 42 Content, then marketing
- 52 Meet now, conquer now
- 64 Marketing for growth and survival
- 74 Prioritizing product announcements
- 83 Using product marketing to help build product
- 93 Mastering a successful product launch
- 104 Life after launch: learning and iterating on your marketing
- 114 So you want to build a brand
- 125 How people buy your product
- 131 Marketing your product to your new customers

# Intercom on Marketing

What we've learned about marketing on our journey  
from zero to 20,000 customers.

Intercom is the first to bring messaging products for sales, marketing & customer service to one platform, helping businesses avoid the stiff, spammy status quo and have real conversations that build real connections.

[www.intercom.com](http://www.intercom.com)

We also regularly share our thoughts on marketing, sales, startups and the business of software.

[blog.intercom.com](http://blog.intercom.com)

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Got questions? Drop us a note at [team@intercom.com](mailto:team@intercom.com)

# Foreword

By Jay Simons, President, Atlassian

Marketing is hard. And great marketing – the Holy Grail-type that makes us laugh, cry and reach for our credit cards – is elusive. When marketers nail it we feel like heroes, dragon slayers, kings and queens of the realm. But most of the time we feel like those bumbling adventurers from the Monty Python movie, hoping nobody can detect the fake clippety-clop of our horse trot.

There have been many attempts to simplify marketing and create shortcuts. Four Ps here. Five Cs there. Clever acronyms that sound like pirates gargling mouthwash (**AARRR!**). But fantastically powerful things – like quantum computing or Hawaiian pizza – resist simplification. They need to be explained and experienced.

Marketing is hard because it is many things at once, shifting depending on the context. It's defining what customer we're pursuing and how many of them exist. It's directing where and how we find them. It's measuring and improving ways to find more of them. It's helping evolve our products in response

to how our markets and customers and competitors are changing. It's forever tuning the signal of our customers, our products and our brands into one that's clearer and stronger and irrefutable.

The best marketers are freaks, in the best kind of way. They're part psychologist, journalist, artist, magician, scientist, mathematician. They're equally ruled by words and numbers. They're moved by the emotional and the rational. And they're under intense pressure to figure-it-all-out(™), to help decide where to go and how to get there in a landscape that's forever changing.

It's not easy. So maybe the fact that there's advice and offers of help scattered everywhere is no surprise. But a lot of those suggestions will just help you make better horse sounds. They rarely go deep enough, nor are practical enough, to put that Holy Grail within reach.

Intercom has been dishing incredible (and relevant) marketing advice for years. And I imagine you're here because you've found their advice both practical and indispensable. This book is all that times 10. It packages up a full meal deal of ideas, suggestions and lessons from across the entire spectrum of

marketing, from messaging to monetization.

I hope you enjoy the read. And good luck on your quest!

# Introduction

By Des Traynor, Co-founder

A common misconception about marketing at a startup is that it means doing things like: signing up on Product Hunt, writing some blog posts about what's wrong with the industry you're in, cold-blasting a bunch of journalists with a press release and then hoping for the best.

There's nothing wrong with doing the above – they are decent starting points, better than nothing – but over the past few years, I've learned that marketing is significantly more challenging than following a playbook.

## **THERE IS NO SINGLE RIGHT WAY TO MARKET A PRODUCT**

I've met with dozens of people leading marketing teams, at 10-person startups as well as huge public companies, and one thing I've learned from all of them is that there is no consistency in marketing. There's no consistency in the types of teams they have, the people they hire or the tactics they use. It's a nebulous word, "marketing".

Whenever you say “marketing,” someone will grab a marker and head to the whiteboard to draw “Ye Olde Funnel of Stages and Tactics.” Usually at a startup they’ll begin at the left-hand side, the top of the funnel. If they’re an experienced marketer, or love reading marketing blogs so they can pretend to be, they’ll call it “**TOFU**,” short for Top of the Funnel. We’re a real hoot, we marketers.

The Top of the Funnel, they’ll say, is your big problem: “You’ve got a world-class product; now you just need to tell people. Find yourself the deep and cheap keywords, and start bidding.” This is a truly fantastic way to ramp up your burn rate, or, in more blunt terms, piss away your cash.

In the very early days of Intercom’s marketing, we could have tried going heavy on demand generation, spending hundreds of thousands of dollars on messaging that wasn’t tested or proven in the market. It’s hard to know what search terms to bid on and what adverts to run when you don’t really know what you’ve built, who is buying it, why they’re buying it or what language they use to describe it.

The first step in marketing at a startup is thinking about it from the inside out. That means you **start**

with your product and then, shortly after, move on to your product messaging. Only when you know what you've built and how to talk about it are you ready to start pushing it properly, which means bringing all the other aspects of marketing in. And there are many.

## MARKETING IS A TEAM OF TEAMS

Much like there's no single way to market your product, there's no single set of skills that defines a marketer. Marketing requires a more extreme variance of skills than do other disciplines at a startup. You might not find many similarities among a product marketing manager, a brand designer, a marketing ops analyst and a PR manager, beyond being human.

*(Sidebar: Unless you want a “jack(ass) of all trades, master of none” marketer, be very suspicious of hiring anyone who claims to have all the above skills. Especially if they have LinkedIn endorsements for those skills.)*

This means you need to turn the microscope on yourself and figure out what skills are most important to your business. Look at the funnel and ask yourself: “Where do we want to start?” Depending on the type of product you have, you can hire someone to look

after demand generation, or product marketing, or product education. But once you start hiring for more than one of these disciplines, be aware that while those people will be looking at the same music sheet, they will be playing very different instruments.

### **PRODUCT AND MARKETING ARE ONE AND THE SAME**

What follows touches these themes and is a collection of lessons about marketing we at Intercom have learned the hard, expensive, messy way. We include the insights that helped us grow from zero customers to more than 20,000, but we've been careful to be honest and have worked hard to avoid the usual truisms. Instead we've focused on actionable advice we think will benefit any early stage startup – from crafting early messaging, to managing a product launch all the way through, to keeping product and marketing aligned.

We really hope you enjoy it.

# Marketing in year one

By Des Traynor, Co-founder

The most important tasks for any early stage startup are to write code and talk to users. When we started Intercom the latter was my job. About 50% of my time was spent communicating with potential users, whether that was asking them to try Intercom over email, meeting them at conferences, responding to them in blog comments or talking to them on Hacker News.

Looking back, I didn't see these activities as marketing with a capital M, but they absolutely were. They allowed us to reach an entirely new audience who would never have heard of Intercom had I not talked to them. If you were to look at the first 100 paying customers for Intercom, I'd bet most came from one of these channels.

Probably the most common question I get about this phase is some version of "Where did you find the time?", and the answer I give is always the same: the same place we found the time for writing code, designing our product, raising capital, etc. You have the time; you've just decided that these tasks are lower priority. I didn't.



There's a great story in Dr. Seuss' *The 500 Hats of Bartholomew Cubbins*. It's about a boy who, no matter how many hats he removes, always finds another underneath. Founding a startup is a lot like this. You're likely going to wear multiple hats and juggle them continuously.

In the very early days of Intercom the marketing hat fell on my head, but I'd be doing marketing a disservice (and 2011 Des a disservice) if I said that's what I thought I was doing. I didn't have a perfectly mapped out content strategy. I certainly didn't have an "acquisition strategy". The plan was simple: get people to learn about Intercom and talk about Intercom. So I was the person responsible for writing the blog, meeting people at conferences, speaking onstage, etc.

These tactics worked because they appealed to the types of people we were selling to. Writing articles about how to run a SaaS business, how to scale a SaaS business, how to grow your audience and how to pick your features was the best way to reach our audience – people working in small SaaS companies like Intercom. Our audience was approachable, attainable and addressable.

## CHOOSING A TACTIC FOR YOUR ADDRESSABLE MARKET

Does that mean that everyone should invest in content marketing early on? Absolutely not. Depending on the industry, customer type and addressable market at your disposal, picking the wrong marketing tactic can leave you dead before you've even started.

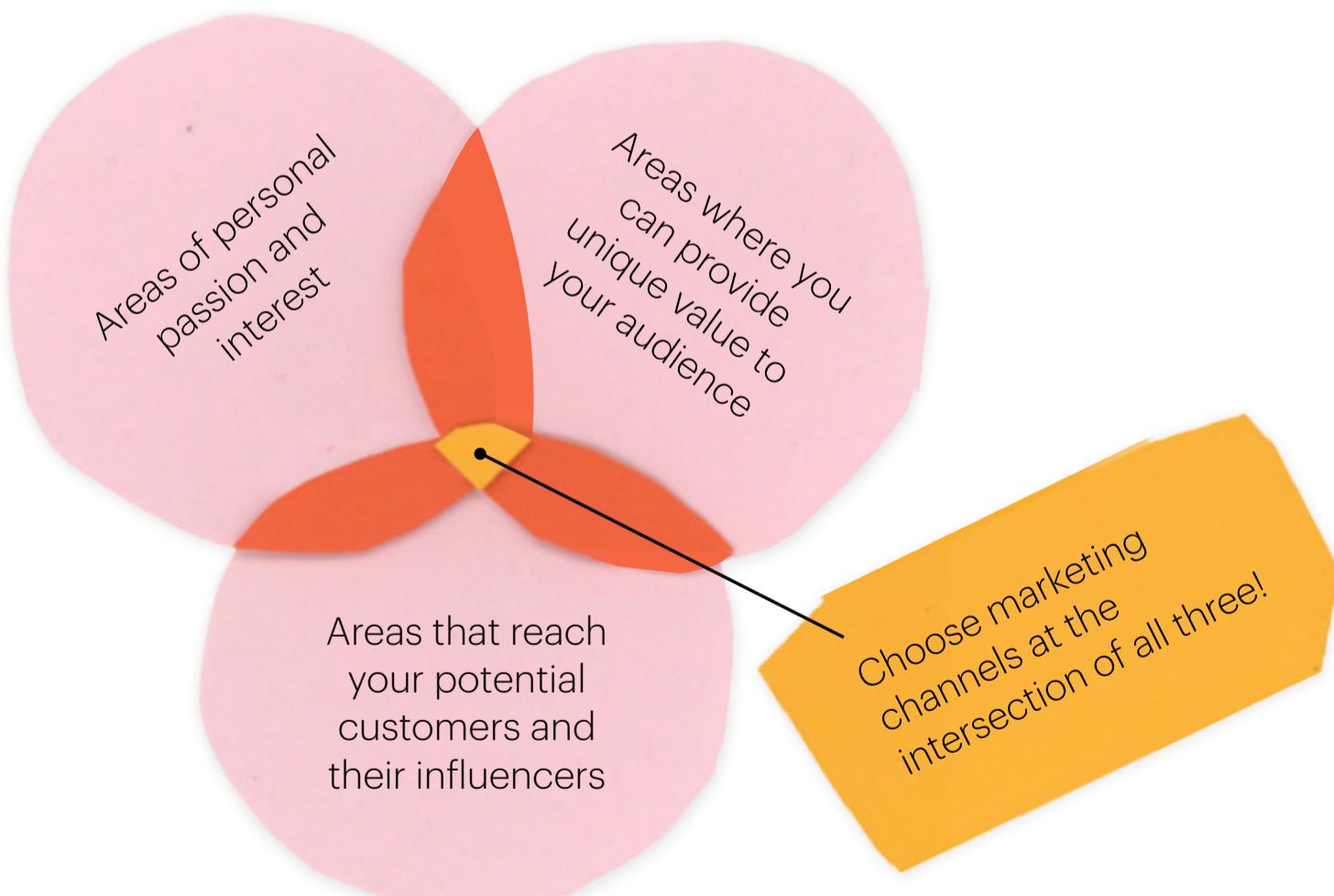
If you're building a new iPhone game aimed at children under 12, opinionated articles on the industry aren't going to help you get traction. At a fundamental level, marketing is about reaching people. And you can't reach people in ways that they're not reachable. Much like you can't ring people who don't have a phone, you can't "content market" to people who don't read, nor to industries that aren't as self-reflective as SaaS. You have to start by understanding the behaviors of the people you're trying to reach, and then choose a particular marketing tactic based on those exhibited behaviors.

For example:

- If you're selling a cool new piece of technology to developers, like Twilio, community focused activities such as meetups are going to work better than paid ads.

- If you're selling clinic management software to dentists, then speaking at/sponsoring a dentistry conference will probably outperform social media.
- If you're selling dating apps to millennials, then clever PR or on-campus, offline campaigns will likely beat event sponsorship.

The reality is you need to get known and trusted by your audience, and to do that you need to build a presence in the channels where your audience is looking for solutions that your product provides.

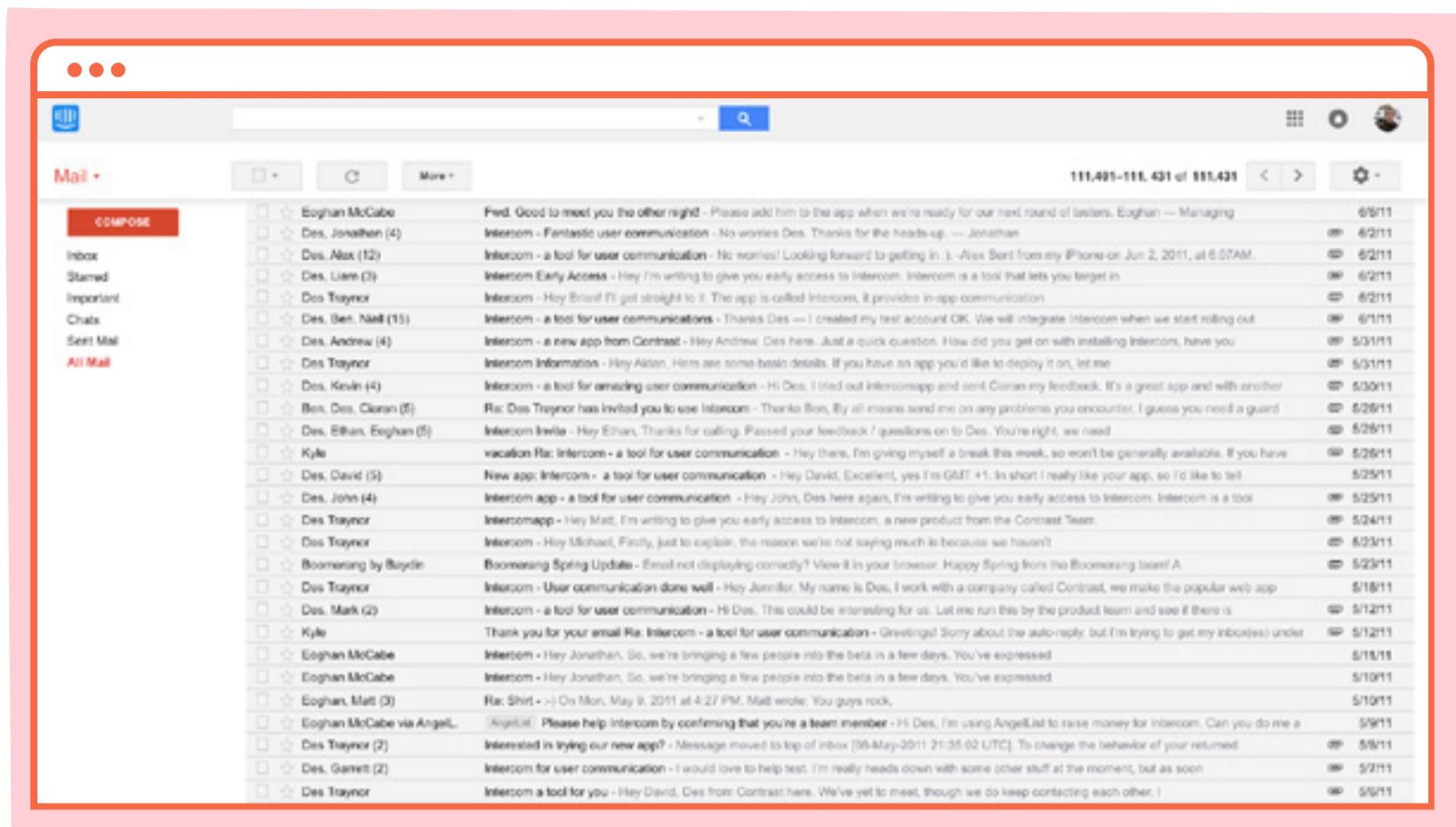


## FINDING “PRODUCT MARKETING” FIT

Once you have this core audience, pitching them becomes a whole lot easier. If you read an Intercom blog post or met me at a conference around 2011-12, you probably received an email from me at some point.

I didn’t send one size fits all emails asking people to give us their credit card details. I’d always remind the recipient of how we met and explain why I was emailing them, and then I’d mock up a screenshot of how Intercom would look if they started using it and tailor the message to their use case. If they were a product manager it would be about helping customers to use a feature more. If they were the CEO it would be about helping to activate customers who were slipping away.

Sending thousands of these personal emails was a grind, but the process was like a petri dish for our early marketing. When you start with an addressable and responsive audience, you get a pretty immediate feedback loop. If people respond with “Piss off. Don’t ever contact me again”, this tells you that you need to refine your message.



A lot of startups spend untold time and resources cooking up some fancy marketing matrix when in fact you just need to have lots of real life conversations with like-minded people about their problems, and mutually explorate how you can solve them. If your product is in the vicinity of a real person's real problem and you have a pitch that resonates, you can't go too wrong.

## ORIENTING ATTENTION TOWARD YOUR PRODUCT

In the early days, you're usually just happy to have anyone talking about you. We were very lucky that a lot of our marketing – the content we'd published

and the talks we'd given – helped us get significant attention among our target audience.

But attention doesn't pay the bills. Even getting to the top of Product Hunt and being tweeted about by the hottest VCs count for little in the long run of building a business. You might do enough to capture some of the early adopters but then the **Law of Shitty Clickthroughs** comes along and the effectiveness of this early attention grinds to a halt.

Law of shitty clickthroughs



Over time, all marketing strategies result in shitty clickthrough rates

- Andrew Chen

The point here is that no matter how successful your early tactics are, you can't rely on them forever. Channels will become saturated, copycat competitors will emerge and consolidated winner take all platforms will look to kill you before you're

out of the gate. You need to constantly be working on marketing tactics that are actually getting people to buy your product. If you're planning to be around for the long term instead of an overnight sensation lighting up TechCrunch for a week, you will eventually need to reach a fatter part of the market, and that requires a whole different set of channels – from PR to paid acquisition to SEO – to survive.

Good luck out there.

# Start with why: getting your story right

By Matt Hodges, Senior Director of Marketing

No matter how good your product is, if you can't tell a cohesive, compelling story about it, you're going to have a very hard time getting people's attention when you actually do take it to market.

Companies like Amazon understand this well and are rightly famous for their “work backwards” philosophy. You start by writing the press release, to articulate how the world will see your product, and then work backwards until you get to the minimum set of technology requirements to achieve your goals for the product.

Our approach to crafting a story begins with asking “Why?” Why are you building this product, and why does it matter? People don’t typically discover and buy a product just because of its features. They buy a product because it solves a problem for them and delivers value in doing so. That’s why it’s really important to think about the end-to-end story you need to tell to capture attention and motivate action, before you build anything.

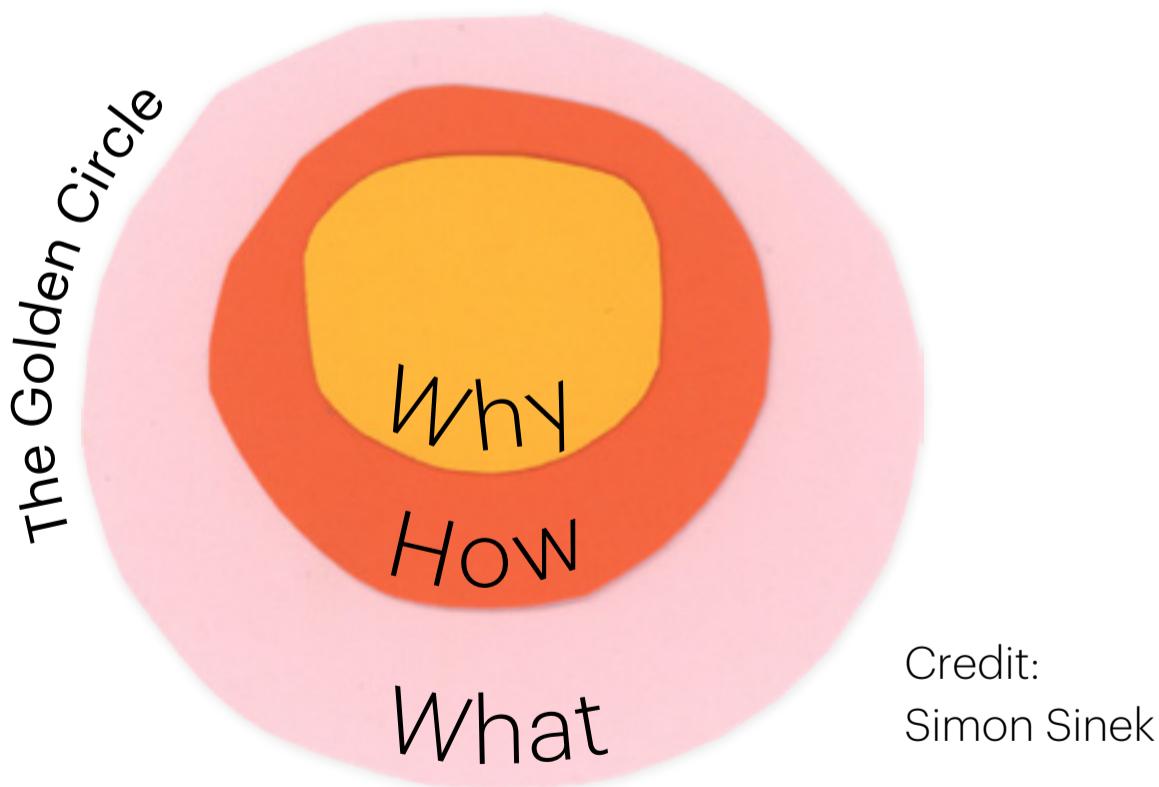


“People don’t buy **what** you do,  
they buy **why** you do it.”

- Simon Sinek

For decades software was sold using feature-based marketing: Start with what the company wants to sell, and then tell people why they need it.

But SaaS has changed that. It's easier than ever to build a product, which the market landscape is increasingly competitive. That means differentiating yourself on product alone is harder than ever. To succeed, you need to reverse your marketing.



## THE “WHY”

Why does your company exist other than to make money? Many people can't succinctly answer that question, which is a problem for marketing. In order to tell a compelling story about your product, you need to have a crystal clear idea of what your company stands for.

This story starts long before you've designed or coded anything. It's written as soon you decide you're going to build a company. It's the pitch deck you're giving to investors, the application you're sending into Y Combinator or the story you're telling to the person next to you on the plane. When I joined Intercom, the first thing I did was to sit with the founders and try to understand the mission and vision of the product: Why did they create Intercom? What problem were they trying to solve? Why does that problem exist?



Marketing, at the end of the day, is not just about a company's mission. It's about understanding why a customer would care about that mission, and translating that understanding into a story that will compel someone to start a trial and ultimately make a purchase.

## THE "HOW"

As the Harvard Business School marketing professor Theodore Levitt put it, "People don't want to buy a quarter-inch drill. They want a quarter-inch hole."

People don't care about you, people care about themselves and their problems. A good story is a lot like the strings on a piano: When it hits something of the same frequency, it resonates and your story sticks.



**Jason Fried**

@jasonfried

"Here's what our product can do" and "Here's what you can do with our product" sound similar, but they are completely different approaches.

9:13 PM - Nov 13, 2013

32 1,362 1,380

To start with, you need to have a clear understanding of who your target customer is. From there, you need to understand what problems you can solve for them. These have to be real problems they are looking for solutions to, and you need to be able to clearly articulate a world in which using your product or service solves those problems for them, in a way better than anyone else has.

For example, around the time Apple launched the iPod, MP3 players were a dime a dozen. The problem was marketing. Everyone else was saying “1GB storage on your MP3 player” – falling into the feature based marketing trap we discussed above – but nobody was talking about how their product would make customers’ lives better.

Apple went ahead and focused on the customer benefit: 1,000 songs in your pocket. By deliberately avoiding talking about the tech (the storage capacity), they enabled people to avoid having to figure out what 1GB actually meant for them. At a time when MP3 players were competing with CD players and 1,000 songs on a device was a novelty, customers could clearly see the advantage the iPod would bring.



### THE “WHAT”

Once you’ve sold someone on your story and shown them how your product can solve their problem, you should back it up with hard claims about how effective your product will be in solving their problem to accelerate their decision making.

Take buying a car: You might understand why you need a car spacious and safe enough for your family, but when it comes down to a split decision, you might select the one with the heated leather seats, or the one that gives you 100 miles to the gallon. Features can often connect the dots and put a story into a greater context. They do this in two important ways:

**Justification:** In B2B SaaS, you’re stressing “bottom line” results that can be achieved by applying your product’s features to solve a particular problem. If

you can demonstrate that the customer will be a hero because your product will save their company \$120,000 a year and help them achieve better results, you've got an excellent shot. Show them how customers like them have actually achieved those results with your product.

**Differentiation:** In a crowded market, your features can help you stand apart from the competition. Take our conversation ratings feature, which is our way for businesses to measure and understand customer satisfaction. What's most compelling to a buyer isn't how they can measure customer satisfaction, but rather how they can take specific actions (or not) based on that insight. They can set new messages to be triggered based on a customer's satisfaction level, or decide to put customers who are dissatisfied at the front of the queue. Features help us back up our story in a compelling way that our competitors can't do.

Product and marketing are two sides of the same coin. A pizza delivery service that promises pizza in under 30 minutes can't have customers waiting an hour. A bank that says it cares about its customers can't have 20 people waiting in line with only two tellers on duty. Create your story in isolation of

product, and customers who might be interested initially will be ultimately disappointed. Get your marketing and product teams in sync, and you'll have created an advantage that nobody else can copy.

# Marketing at a product first company

By Matt Hodges, Senior Director of Marketing

**Despite the mountain of evidence contradicting the mantra of “if you build it, they will come”, it’s still extremely prevalent among product-first companies. Why?**

First, most founders don’t have a background in either sales or marketing, and even though they’re told to “start marketing the day you start coding”, they just don’t know where to begin, or they’re incredibly overconfident. Sure, they probably know enough to build a landing page for capturing email addresses, but do they know what to say on that page and how to say it? Do they know where to go to promote their product, and how to do it once they get there?

Getting through the first launch requires more than a marketing Band-Aid; it requires instilling a company-wide philosophy that marketing and product aren’t two antithetical forces but two sides of the same coin.



Walk into any product-first company and you'll notice the common misconception that "marketing" is a dirty word. Many startups build something for themselves only to discover that other people want it. Eventually they start selling it via word of mouth and little else before realizing that they need some sort of coherent marketing strategy if they want to accelerate growth.

At that point, they hire someone to run marketing, but leave that person to their own devices. Rather than truly invest in the department and integrate the marketers with the product team, they believe great products sell themselves.

When I was recruited to join Intercom as our first marketer, I remember receiving a LinkedIn InMail (back when people still read those) from Eoghan, our CEO, who sold me the opportunity of building a marketing team at Intercom, while also trotting out that exact cliché: "The product almost completely sells itself." Luckily, when I sat down with Eoghan, and Des, it turned out they were much bigger believers in marketing than I initially thought. They believe that neither product nor marketing can excel in isolation, which has become a core principle of our go-to-market strategy today.

## MARKETING AS A DIRTY WORD

There's a famous blog post from Fred Wilson, a co-founder of Union Square Ventures, titled nothing more than "marketing," where he makes broad statements like "Marketing is what you do when your product or service sucks."

This post is highly cited by product-focused people as one of their many justifications for not doing any marketing at all. If you build the perfect product, the theory goes, they (paying users) will eventually come to you. I'd argue that mindset is completely wrong.

Anyone who thinks marketing can't add value to and accelerate the growth of your business is just plain naive.

When I arrived at Intercom, a bunch of people were wearing marketing hats in disguise: Des (one of our co-founders) owned the blog, the product managers wrote product announcements, and Eoghan (our CEO) created the homepage of the marketing site. Everyone was doing "marketing", but nobody wanted to acknowledge it. Why?

I think it comes down to a fundamental misunderstanding of marketing's role. In the new world of SaaS, marketing should be involved at every

stage of the funnel, from the first point of contact (your website) to the decision to purchase (the page users enter their credit card information), as well as ongoing product education (docs, demos, messages and webinars). Every step of the way is an opportunity to help people feel good about the decision they are making and each requires a different set of specialized skills.

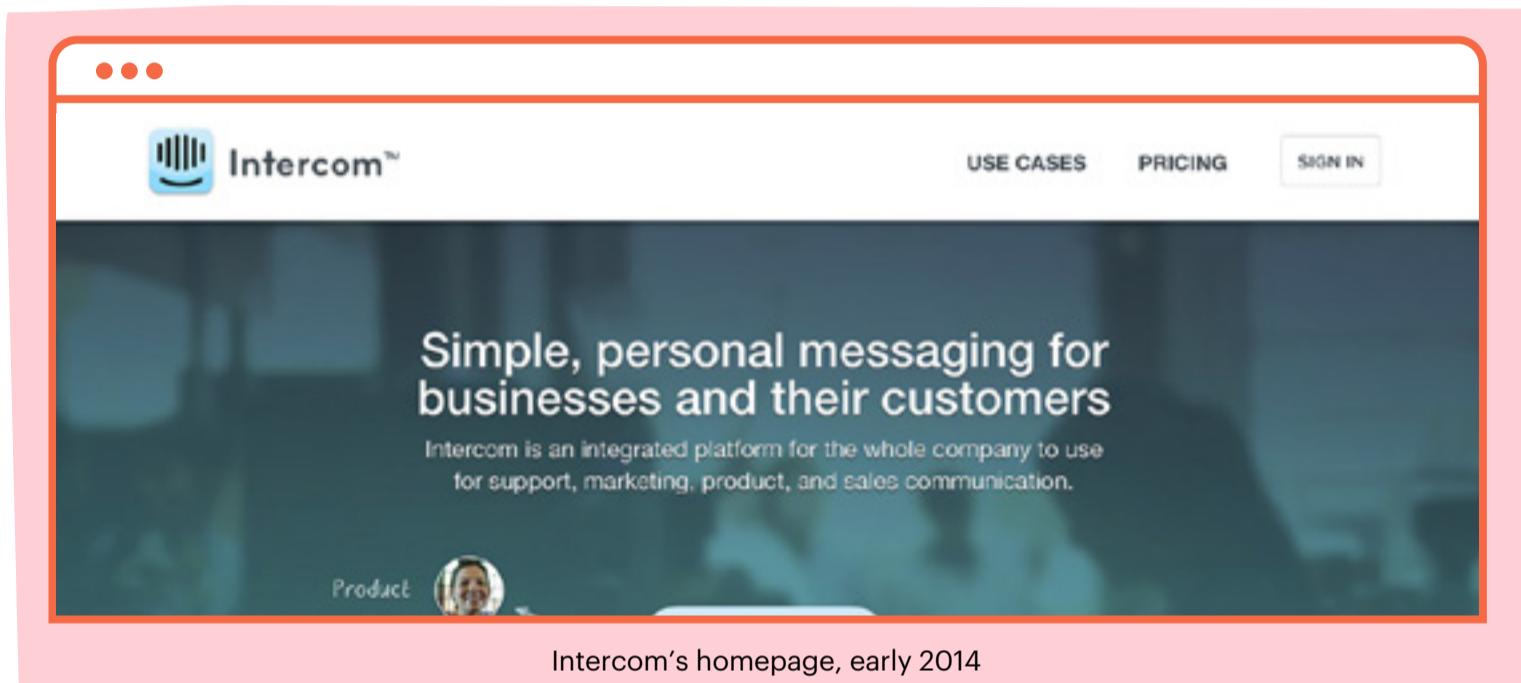
That's why it's a mistake to think of marketing as a single team. PR, demand generation, content marketing, product marketing and events are all key to a product's long-term success. Without any of these components, you can build a product, but not many people will show up to buy it. Those that do will likely be confused as to what you're actually selling.

## WHERE DO YOU START?

That's the easy part: Hire a marketer.

For Intercom, that was me, a product marketer to communicate to the world what Intercom was building and why people should care. Throwing money into ads to reach new customers is easy, but it's likely a waste of money if you don't get this part right first.

I started with Intercom's homepage, the most obvious place because it's the first, and often last, impression people get of the product and company.



The majority of people who visit your marketing site don't have the time to invest in learning what it is you actually do. If you can't communicate that clearly on your homepage they'll just bounce, quite literally, off your site – an opportunity gone.

The next most important step is amplifying the things your product team is building. A lot of the time, product teams build entire feature sets without telling anyone about it. They're too shy or too naive, or simply don't know how.

We've seen teams release huge amounts of work or improvements to the world in the hope that new or existing users might stumble onto them, only to find two years later people are still asking in forums for features that are already inside the product.

We'll cover announcing too much in a later chapter of this book, so let's focus on the biggest two fallacies of deciding what to announce and how, at a product-first company:

### 1) It was hard and took a lot of time, so it must be important

You might be working with some of the most talented engineers in the industry, who have spent six months refactoring your code to make the best app in the world. And they might be extremely excited to share what they're working on with the world. Unfortunately, that's no guarantee people are going to care. When it comes to announcing new features, don't equate effort and importance with what's appealing to your customer.

### 2) Overpromising

We've all read that big flashy blog post that promises something that is going to change the world, then

ultimately (often eventually) it ships and flops. People will remember that for a long time.

Here's an example: A big colorful company is going to change the way people see the world! They'll call you an "explorer" from here on out, but it'll cost you \$1,500 for a pair of blurry glasses that make you look like a tech-weirdo from the 1970s. Don't overpromise on something before it ready (or just as importantly, the market is ready).

## SETTING EXPECTATIONS

The key to stop yourself falling from into either of these traps is setting the right expectations inside your company, from day one. For example, you're not going to get TechCrunch to cover that insanely complex feature you spent months building, so your startup shouldn't waste time building a landing page for it.

It's not because the feature isn't interesting, but rather because there's not a good story to be told, which is typically the most important piece of effective marketing. As we saw earlier, a good story captures people's attention and motivates them to take action.

Here's a solid example from my earliest days at Intercom: When we finally released custom event tracking we could have just said, "Okay, you can now track custom events in Intercom", but most people probably wouldn't have cared. Yes, that accurately describes the feature, but that doesn't tell anyone anything about why they would want to use it or how it'll make their lives better.

The value in the Intercom Events feature was that you could send messages to customers at a perfectly timed moment, which wasn't possible before. You could reach people when they logged in for the first time, or maybe when they cancelled their account – so that's the story we went with. I focused on highlighting the things people wanted to do, rather than the feature itself, because people understood the value in doing them. This was a breakthrough. It wasn't too long before the product managers realized that they should give us a heads up before they were ready to ship something, rather than after.

### **APPEAL TO THE MARKET'S UNDERSTANDING**

About two years ago, I wanted to launch one of our new products as Intercom's "live chat". The product team, however, were adamant that live chat was a

relic of the past. Instead, they wanted to go to the market with a “seamless asynchronous messaging product.”

If the product team’s job is to innovate and build the product of the future, then surely marketing’s job is to dissect that to make sure that the market can:

A) Find that product

B) Understand it

C) Be convinced they need it

While we were building this product we discovered there were 100,000 global monthly searches on Google for “live chat software” and almost zero for “asynchronous messaging.” Sure, the search term was less crowded, but nobody knew how to describe that future yet, let alone buy a product to solve that problem. If ever.

Similarly, when we launched our new knowledge base product in December 2016, it became clear that product and marketing were not aligned on what the product was, let alone how we should take it to market.

This small exchange between Paul, our VP of Product,

and Raechel, a product marketer on my team, sums it up well.

**Paul:** “*Educate* is not a docs product”

**Raechel:** “Why does our own knowledge base, powered by our new product, live at [docs.intercom.com](https://docs.intercom.com) then?”

Now, of course there was a rationale to both arguments. Paul was (rightly) arguing that the product was more than a knowledge base and that we needed to help build a bridge to the future. But marketing had to get people to that bridge first. This is not about marketing dictating what product to build, but rather about determining what position you want to hold in people’s minds.



Correcting this misalignment delayed the launch of the product by a couple of months, but it was the right decision to give the product the best chance of success when it launched.

### ALIGNMENT IS KEY

Fast-forward to today, and Intercom's teams now hold themselves to a new rule: If we're launching a product and want to spend more than a week on it, **the product manager and product marketing manager must align on the story we want to tell come launch.**

This was a fundamental shift in how we build new products at Intercom. There's always tension involved, and getting that story right is hard, but it creates a better outcome for everyone, including our customers.

We still hear "we've got a great product, now we just need to add marketing" all the time, but at least now we know that there's a lot more to it than that. Don't delay aligning your product and marketing teams. If you do, you'll live to regret it.

# Getting word of mouth for your startup

By Des Traynor, Co-founder

Looking back, I would say the vast majority of Intercom's growth can be attributed to word of mouth. Whether it was tweeting a blog post we had written or giving us a shout-out at a conference, people took it upon themselves to tell one another about our product.

In the very early days, you will be grateful enough for any word of mouth you can get. In fact, you can be so grateful that you don't really care how people are talking about your product so long as they are. I remember a discussion on Twitter from the early days where people were calling us the best issue tracker they'd ever seen. I remember just thinking: "Oh, no way, that's not it!" They were pitching our product in the completely wrong way.

There's a misconception that word of mouth is this mystical force that's out of your control. Sure, you can't control what words come out of whose mouths, but you can encourage people to say the right words. If people are saying, "I don't know how to describe your product," or are referring to you

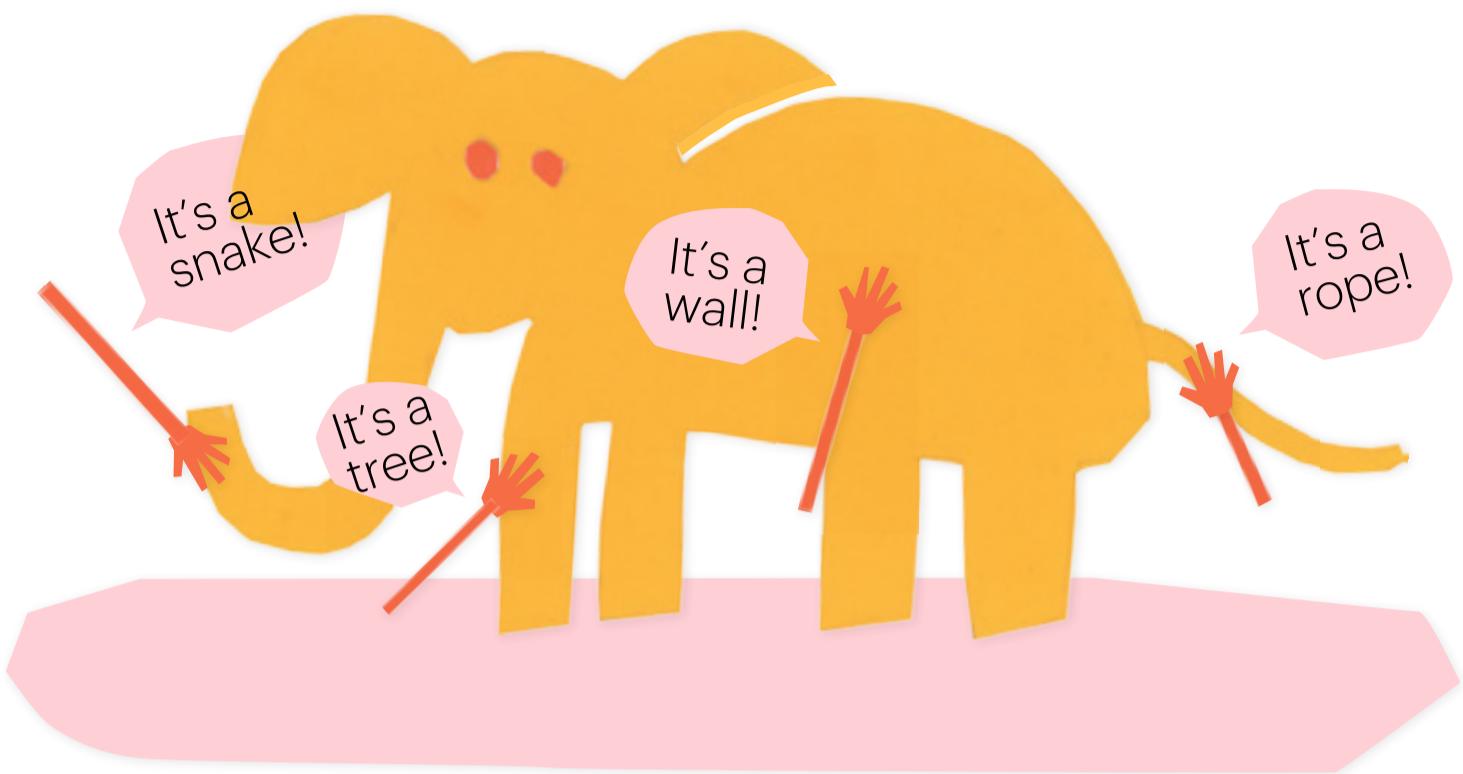
incorrectly, it's on you to tell them the best way to explain it. Have an opinion about what people are saying about you, because if you stand for nothing you'll fall for anything.



There are hundreds, if not thousands, of strategies for acquiring new customers, but word of mouth is probably the most powerful way of getting them. Put it this way: You're much more likely to try an app that a friend tells you about over coffee than one you see in a Google search ad.

Word of mouth is your first traffic source, but it's hard to put a price on its value. In a world where marketers are used to demanding proof before they spend a penny on anything, word of mouth offers little comfort to startups who are looking for a channel that's easily measurable.

Word of mouth is unpredictable, but you can do your bit to encourage it, however. That starts with making sure the same words come out of lots of different mouths.



The image above shows the story of the blind men and the elephant. It's a famous story about a group who argues over what they've encountered, as they are each exposed to only a small piece of it. This particular elephant would struggle to get word of mouth, because there's too many conflicting ideas about what it actually is. Its messaging is confused.

This elephant, of course, is your product. As your product expands the number of things it can and will be used for will grow. Which means some people might call it a time tracker, while others will say it's for tracking vacations. Some will say it's a project management tool, while others will call it a task list. This is one of the reasons it's important to have great

messaging. It helps users learn how to explain your product, the most important ingredient in helping word of mouth to spread.

Great messaging is simple, compelling, specific, differentiated and defensible.

**Simple**. It's easily understood by current and prospective customers.

**Compelling**. It describes something that is interesting or desirable to them.

**Specific**. It captures what your product does, not an overly abstract statement of it.

**Differentiated**. It includes something that makes it unique among peers.

**Defensible**. It shouldn't be easy for your competitor to adopt/copy your messaging.

Without clear messaging about what your product does, you let everyone make up their own mind and thus their own messaging. And that's how you end up with six people all failing to describe an elephant.

# Content, then marketing

By John Collins, Director of Content

**Explaining why you've written about content marketing, in a book about marketing, that itself is a piece of content marketing. Did someone say meta? I'll give it a shot anyway.**

Intercom has a content team – we're the ones who helped bring this book to life – but it's staffed by editors and producers, not marketing managers or content strategists. We didn't choose those titles in some effort to be cool or hip. We did it because at Intercom we believe in always starting with first principles.

What were we hoping to achieve when we started blogging back in 2011? We wanted to attract customers. As Des mentioned already, the early stage SaaS crowd was, and is, a fairly self-reflective bunch. So sharing well-written insights on all aspects of running a software business looked like a great place to start.

We knew writing things that potential customers wanted to read would be easier than trying to make people want to read what we'd written (the usual approach of most content marketing). The only way we know to scale that approach is

by building an editorial team. If you want to adopt the same approach this chapter makes the case for it and gives you some tips to get started.



We've never been 100% comfortable with the phrase "content marketing".

From day one at Intercom, publishing our own articles – and subsequently podcasts and books – has been a hugely successful way to raise the profile of the company and our products. The strategy was simple: share our latest, freshest understanding of the world with other startups and product people and they would reward us with their attention.

But we never fooled ourselves that this was a low cost activity. There was a cost to us learning the things we shared. There was a cost to us taking the time to write them down and publish that knowledge. There was a cost to us making sure we got it in front of the right people. And as we increased the frequency and range of things we published, those costs grew in tandem. But it was a price we were willing to pay because it purchased us high value attention and appreciation.

Even though we focused so much on producing content, it was never about marketing with a capital M. Communicating in as authentic a way as possible attracted people who were willing to take a chance on our product when it was still less than perfect. It attracted people who shared our values and wanted to work with us (as well as repelling those who weren't a good fit). It attracted invites to talk at conferences and ultimately organize our own world tours.

Our approach was reinforced by what was happening in the wider world. In the span of five years content marketing has gone from promising a new, more authentic way for businesses to talk to consumers to something with connotations of spam and hoodwinking readers. Many startups now view content marketing as a box to be checked in the mythical playbook called "0 to 10,000 customers in 5 easy steps".

There are some companies that do really successful content marketing driven by aggressive email captures, funnels, A/B tests. Let's call it playbook content marketing. But there's also a growing cohort of companies, like Intercom, who believe that if you focus first on publishing great content, you'll be far

more effective at attracting people to your product ([Figma](#) and [InVision](#) are two examples that spring to mind and of course [Basecamp](#) pioneered this approach and have long been an inspiration for us).

Here are five principles we hold dear regarding content. Your mileage may vary; please adapt them to your own needs.

### **1. CONTENT, THEN MARKETING**

Google the term “content marketing”, and you’ll get pages upon pages of hacky advice about how to game the system, such as how to write just one long form piece of content and turn it into 78 tweets, 42 Facebook posts, 12 LinkedIn Pulse articles, 8 blog posts, 4 podcasts, 2 white papers, an infographic and an ebook. Or why you should be A/B testing your headlines even though you’re struggling to get anyone to visit your site in the first place.

These approaches all put marketing first with little concern for the content itself. But the phrase “content marketing” actually puts content first. It’s just that the term is so widely used, we’ve all become deaf and blind to that primacy. So “content, then marketing” became the first principle of our

team. Put simply, we believe if we're not creating something people will want to read/watch/listen to, then we are wasting Intercom's resources.

If we were driven primarily by marketing considerations, we probably would never have taken the risk of publishing a 120-page hardcover book sharing what we've learned about starting a company. But by focusing on the quality of that publication, rather than marketing hacks to get readers to download something of lower quality, in net terms we're attracting more potential customers, which makes the whole exercise profitable.

## 2. GROW WITH EDITORIAL PRINCIPLES

Applying the same editorial principles that newspapers and magazines have used for years has been the key to our success at scaling content.

There has to be a clear content strategy in place that defines things like:

- the **subject areas** you want covered
- the **level** of articles (101 vs expert deep dive)
- the **quality** of articles
- the **types** of writers (New hires? Senior execs?  
Customers as guest authors?)

and much more.

Editorial principles ensure we invest our time and energy in creating content that people want to consume. That's subtly but fundamentally different than creating content we want people to consume. It puts the reader/potential customer first, which makes it much easier to reach them.

### 3. BE BRAND RELEVANT

When you're producing content as a brand there's a temptation to optimize for popularity, rather than relevance. But a good content program is about producing popular material that's also relevant to both your product and brand.

Here's an example: We believe that successful customer engagement comes from delivering the right message to the user at the right time and place. To that end, we write posts on our blog like "Send the perfect message with the five Ws" or "A day in the life of a message".

The book we wrote, which consolidated our learnings, proved to be a valuable source of new customers, but only because it was both useful and relevant to our brand, as well as what potential

customers might need to achieve.

#### **4. HAVE AN OPINION**

The normal marketing-driven narrative is that the world is drowning in an ocean of digital content, so your efforts should focus on getting attention. What usually follows is some slightly suspect SEO hack that's guaranteed to send traffic and riches your way.

Our counterpoint is that the last thing the world needs is more mediocre material. Having an opinion (we're big believers in strong opinions weakly held) is a really easy way to sidestep that particular pitfall. Readers are also more likely to share opinionated content, because it makes them look smart. Just don't confuse being opinionated with being contrarian or angry.



**Jason Fried**

@jasonfried

What's missing most from business today?

Not sales. Not service. Not technology.

Answer: A point of view.

5:39 PM - 14 Jan 2010

65

1,437

1,629

## 5. BUT NEVER LOSE SIGHT OF THE GOAL

People regularly ask us how we measure success with our content efforts, or what metrics we use to determine something is working.

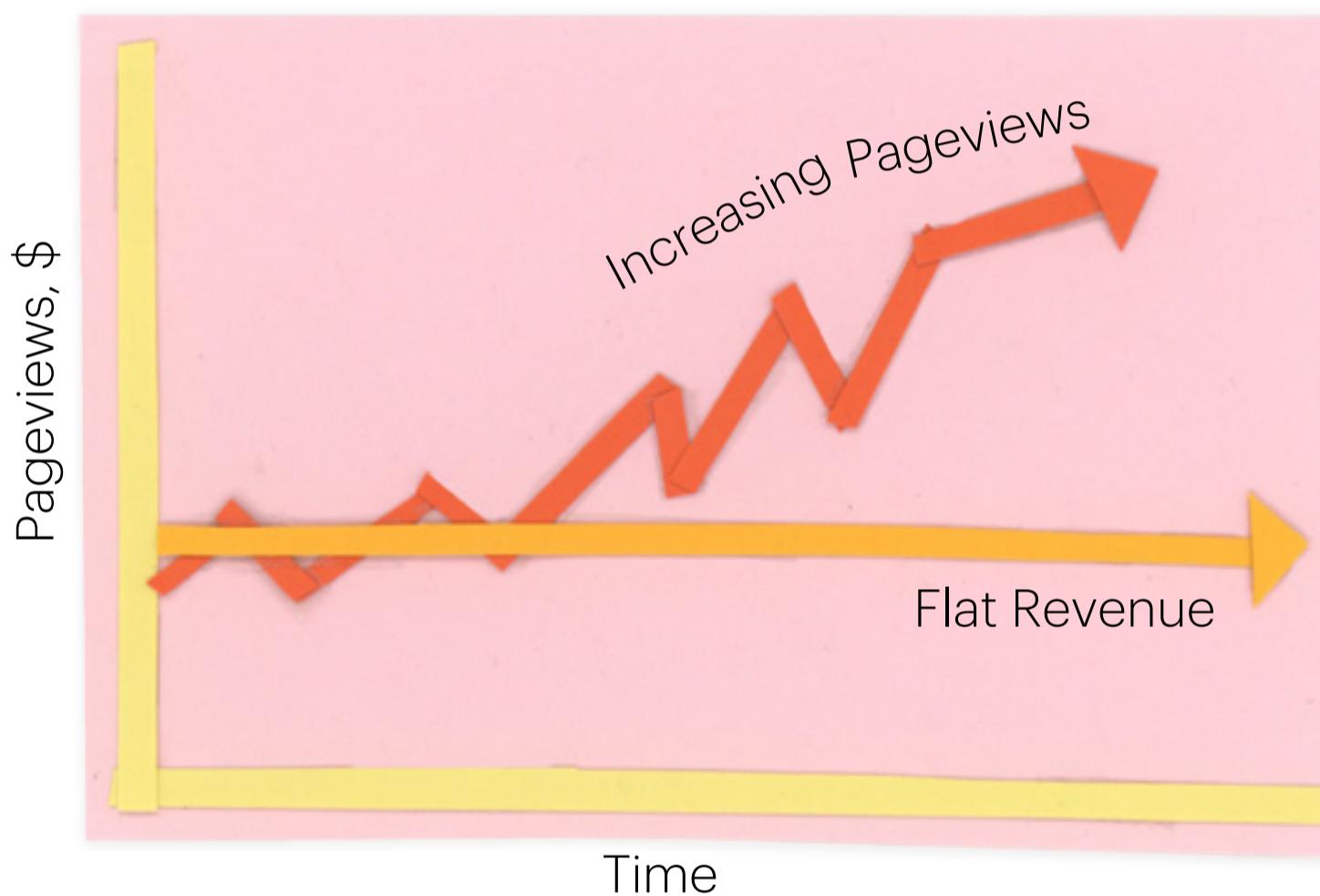
At traditional publishers, pageviews are the only thing that matters, and as a in-house publication we believe that's an important measure of whether our readership is growing or not, but not the only thing that matters.

Pageviews are a great way to understand if our efforts are working and if we're adding more readers to a funnel that results in more customers, but more important is ensuring the readers we attract are the kind of people that might be in the market to

buy Intercom products at some point. That can't be measured by a raw data point on a screen.

At the end of the day you're selling your product, and pageviews can be a distracting vanity metric that amounts to little, particularly if you're not reaching the right people in the first place.

## The Curse of Vanity Metrics



### YOU NEED TO EARN THE RIGHT TO MARKET

Where playbook content marketing goes wrong is in trying to market and sell from the get-go. We

have to give you, our readers, something of value – our knowledge, insight and experience – before we earn the right to market to you. Our “content, then marketing” approach means we still engage in the full gamut of marketing activities to nurture and convert leads after we’ve attracted them with content.

So to be crystal clear: We absolutely believe in marketing in the traditional sense. But when it comes to “content marketing” we know that content comes first.

# Meet now, conquer now

By Megan Sheridan, Manager of Events

In our industry there are dozens, if not hundreds of ways you can get in front of your customers or people you'd like to be your customers. When resources are low, impact is key. And where opportunities lie, choices have to be made. To do that, it's not enough to replicate textbook marketing strategies. It's important to ask yourself: "What's different?" or "What could be different?"

Events rely on difference. They get someone's attention for a long period of time, in a space that you design and create yourself, for the people that you want to meet, that day. During that time, you get to have your own voice and their consideration. This isn't something you get with a landing page or a billboard. It's something you definitely don't get with paid advertising either.

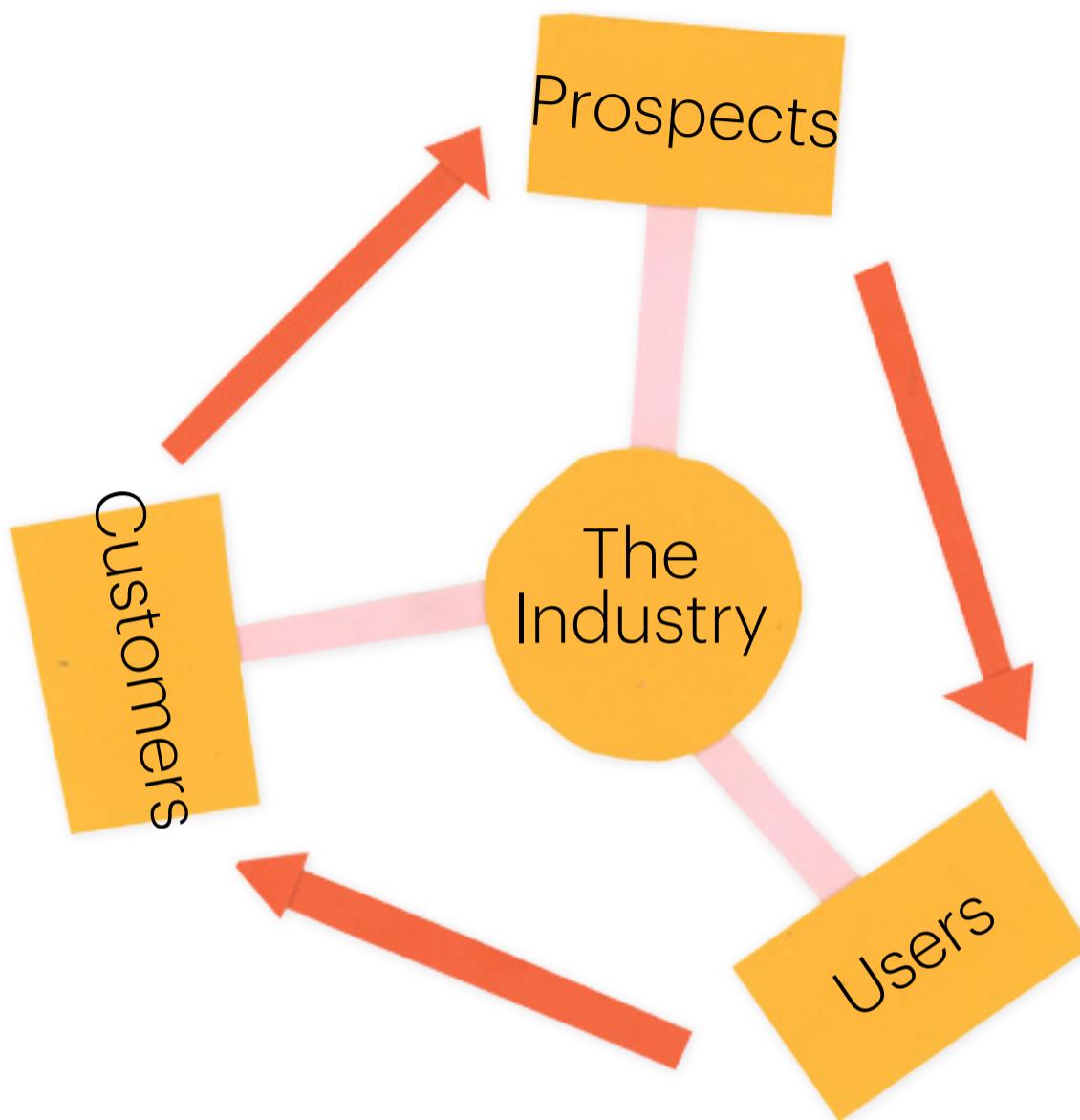
Is it as measurable? Not always. Is it easy? Definitely not. But when you're just starting up, bar knocking on someone's front door, this is the most targeted, proactive, personal way you can meet the people you need to meet and build lasting relationships.



Businesses have been giving prospects and customers “an experience to remember” for hundreds of years. Big meals, golf trips, suited drivers, nice cars, champagne – the works. Those investments have felt good for those in it for the ride, have raised an eyebrow for those on the sidelines, hitting budgets hard and somewhere along the line, have made business sense.

The truth is that nothing has truly changed. Companies still do that. They’re now just called “events.” Well-executed events can attract, convert, educate, nurture or delight your audience, depending on how strategic and thorough you’re willing to get.

Product positioning, knowledge and brand awareness are your first ports of call in the early days. Unlike other functions that you have (or will have) in your company, events can directly connect you to four audiences at once: your customers (the people who pay you), your users (the people who use your product), your prospects (people you want to become customers) and the rest of the industry. That’s a big opportunity waiting for your attention, so why doesn’t everyone just jump off of the ledge?



During the first few years of building your business events are hard to justify. They cost a lot when money is tight and they're difficult to measure. While it's easy to be suspicious of business activities that don't translate well on a spreadsheet, it doesn't mean they're not worth doing. Your business relies on having customers that are going to last, so relationships matter.

Of course, talking to people and building relationships is harder than sitting in an ivory startup tower working on a marketing matrix. You can't lock yourself in a room or outsource this to some agency. Events might be a lot harder than some other tactics, but nobody said marketing was easy.

It's never too early to build events and it's never too early to meet and conquer.

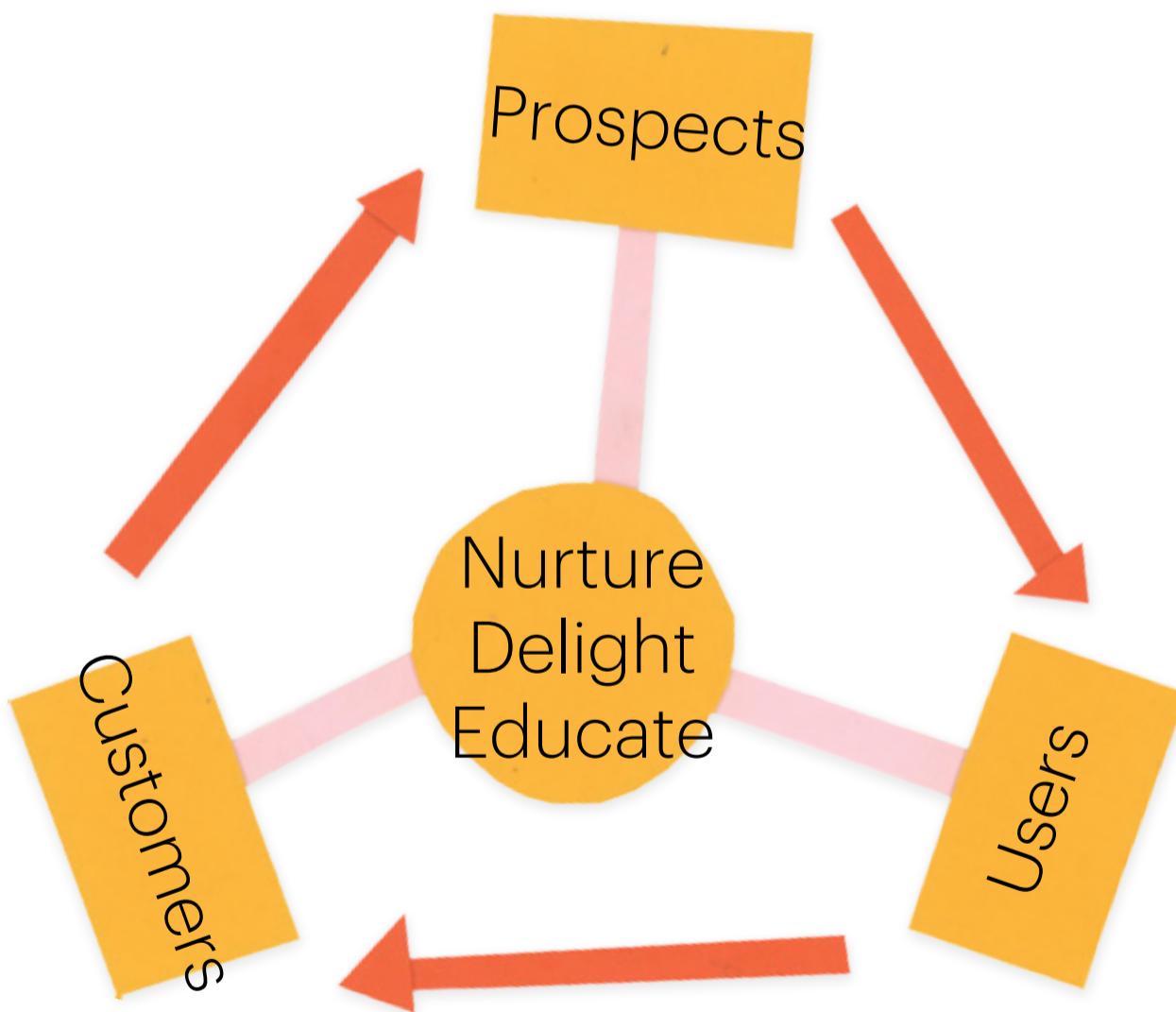
### **MEET YOUR AUDIENCE WHERE THEY ALREADY ARE**

Once you start building your product, there's a whole audience out there waiting to hear about you and what you've built. That means from day one, your strategy to meet and spend time with your audience is about dividing and conquering.

To do this, you should dial-in your company's philosophy (who you are and what you care about), your product philosophy (why your product exists and where it is going) and make your first set of goals about how you'd like to meet and best spend time with your audience.

An essential part of starting out is creating a moving target for your company. Get comfortable traveling to your audience rather than expecting them to

come to you, whether that's conferences related to your product or meetups organised by like-minded people. That's likely going to be your most significant resource and finance drain at the start of building your events strategy. Invest enough time in events and eventually they'll be willing to fly to you, but not on day one.



## USE EXISTING CHANNELS TO YOUR ADVANTAGE...

Finance can feel like a blocker to getting started but lack of funding is a forcing function to putting thought-first. If your budget is low — it should be for events in the early stages — use channels that others have created before you and paths that have already been cleared.

The most obvious carrot in many cases is a tech conference that fits your target customer audience. While most events are about mutual buy-in between you and attendees, know that conferences are not. They're an indirect partnership where the cards are heavily stacked in the conference's favour.

With the wrong mindset or context, a conference will take your money and leave you hungry. It's not a conference's job to do a good job for you. It's your job to buy their audience and do something with it. Don't spend your precious early dollars on them and don't spend your last — you won't get them back. Start spending big money on conferences only when they allow you to be specific, aggressive or competitive. That's impossible when you're small.

Until then, host spin-off events during the conferences that may be in your town, or those

you're speaking at, pitching at or attending already. At least 50% of most tech conference tickets are given away for free to attract a large crowd — make a plea, a trade or a friend that runs the conference. There are ways to save here, so find one. When you're there, tap into the conference's press attendance and pitch them a story ahead of time or ask them to meet you. You can gain a lot for free, and you can give a lot for free. That's what conferences are about.

A bad version of this opportunity is spending half of your annual marketing budget on sponsoring a conference closing party. Sure, your logo will be on a balloon or napkin, but no one will care. People at this stage are tired, thirsty and up for one last dance — they've had a long week. They won't care because they're not attending the event on account of your product, to meet you or to gain something from your company.

If your audience doesn't share your goals from the first moment of your event you're wasting your time and money. You can't expect to host a regional drink up and collect 1000 leads. If you're ever in doubt here's a sanity check: If a conference isn't willing to pay for it themselves it's not valuable to them. It's not a milestone or a milestone deal breaker for them or

their audience either. Don't be that person that gives them the extra thing that doesn't add value.

### **AND THEN BUILD YOUR OWN**

When you're using paths others have laid down before you, it's best to do something that you can control e.g. host office hours with customers you've never met, that could be using your product in a better way. Meet them in a quality coffee or tea shop near the conference that's on-brand for your company, has a generous amount of space and has good Wi-Fi. Be sure to let the store know that you're showing up ahead of time and will be spending time there. You'd be surprised by the kind of setup they'd be happy to organize for you.

You could also host an invite-only meetup in the hotel bar that everyone is staying at for the conference, or somewhere nearby, which matches the company brand. Make it personal by dropping a handwritten note for them at the front desk.

Starting small means intentional focus, resourcefulness and driving interactions with your company's personality. As you grow, that should never change. These moments define how people

think of you and your company from personal memory.

### **MAKE SURE YOU'RE IN CONTROL OF THE EXPERIENCE**

When you've started to see some success in your early events, it can be tempting to outsource your events to ramp things up. Outsourcing can mean anything from relying on a conference to deliver your branding need to paying an events company to "wow" your customers on your behalf. Don't do this.

When you outsource anything from your company you pay someone with different goals than you to represent you and carry a brand they're not a part of. Your events will never grow or scale well if you do this.

For the longest time, theatre companies and venues have been tightly aligned with and owned by promotion houses. Apart from acknowledging the different skillsets at play in events and the importance of alignment between those functions, this classic structure highlights something we all too easily miss: events are a success or a failure before they ever happen.

Events are 50% idea, 30% promotion and 20%

execution. Any company's first events team member will need to be a curator, then a promoter and lastly a producer. Companies that are successful at building brand experiences never outsource their ideas or their voice. They can, however, outsource their executors.



### BUILD BIG AND BE RISKY

The sooner you introduce speakers, personality and creative control to your events, the better. Don't dive in alone to your first "from-scratch" event. Co-market and share the effort, the creative and the expense with another company or meetup group that you respect and want to be seen with. Use tools you already have. Your office can be your venue,

your team can be your thought leaders and your customers your first audience.

When you're starting to think about what events might look like for you, think about what you respect, what's missing, the things you don't like and what you can do that no one else can. There's so much out there waiting for somebody to grab it. No one is nailing this. **That's your opportunity.**

When building brand experience, you must commit to humanizing your company and embracing its roots. It's not about tricking anyone. It's about making sure your audience stays focused and that your company stays real, all of the time.

Once you've begun to build what an event means for your company, you're in a strong position to take a leap and build it out, make them bigger and grow your audience. That's an inherent risk many startups don't take, but we took it and it works.

Speaking to people is hard but you have to do it. Do it in a way that's strategic and puts your company first. Start small, delivering the message that's important to your company on the very first day. Start listening to what your audience needs and what you have to say that's different to what everyone else

is talking about. Spend time with the people that matter: your audience, your opportunities.

This is a space that you can use to define your business today. Nobody has what you have, so ask yourself and your company “What’s the risk in us not doing this?” I bet it’s higher than you going ahead and making it happen.

Events are an opportunity waiting for you, the moment you have someone using your product. Don’t ignore it.

# Marketing for growth and survival

By Brian Kotlyar, Director of Demand Generation

**S**tartups fail for all kinds of reasons – their technology stinks or they’re not filling a need – but marketing should never be one of them. And yet in spite of this, a lot of businesses fail because they’re just no good at acquiring and retaining customers.

That’s what demand generation really comes down to. People tend to overcomplicate it with fancy methodologies and matrices, but when you’re starting out, try not to get too fancy. Try not to buy unnecessary technology or chase fads. Just remember: Making money is good and boring isn’t bad. Most great companies start with profitable and boring ways to acquire good customers. Do that, and most things will work out just fine.



There's one thing all wilderness survivors have in common: They didn't get eaten by a bear.

Wait. Isn't this a marketing book? Why are we suddenly talking about bears? Well, there's a strong parallel between surviving in the wild and starting a business. You'll either find customers and get them to pay you, or your business will fail and your idea will die.

Looking at your business in this stark way will put you in the right mindset. It's fun to dream about what you'll do when you have millions of dollars of revenue and profits, but if you can't get those first few customers to pay you, then you'll never have the chance to sell to customer No. 1,000 or 10,000.

So how do you build demand? How do you find customers? How do you avoid being eaten by a bear? There's no easy answer, but the key to success lies in creating a repeatable process for generating demand.

## WHAT IS DEMAND GENERATION?

You've definitely heard "demand generation" thrown around as a startup buzzword before, but let's be clear in our definition before we start. Demand

generation is the creation of systems that build awareness of and a market for your products with target customers.

We can break this down into a few different elements to make it clearer:

- **Products**: the actual things you sell.
- **Customers**: people who buy your products.
- **Systems**: a combination of people, processes and technology that can run over and over again.
- **Awareness**: knowledge of your existence and what you do.
- **Demand**: interest in what you do and the value it creates.

The specific demand generation system you build varies based on what type of product you sell and the customers you hope to attract. However, there are common themes to keep in mind as you sketch these out for yourself.

### **1. START WITH A POINT OF VIEW**

Your business exists to solve a problem. It might have begun as a problem statement like “Email is too expensive” or “Catching a cab is too hard.” It might also have started with loudly chanting words

like “AI” or “blockchain” while dancing around a fire. Regardless, you need a reason that your company exists besides a desire to make a lot of money.

“Why does your company exist other than to make money?”

We won’t dig into this too deeply here, but you should [read this post from Des](#) where he clarifies how to sharpen your company’s point of view.

## 2. DETERMINE YOUR POSITIONING

Ask yourself who your product is for, which is another way of asking who your customer actually is. When you know this, you should then clearly define what your business actually does for the customer, what value is generated for them and how your way is better than the old way they might have done it.

Here’s an example for a fictional company:

*The new Artificial Intelligence shovel, by Shovl.io,*

*helps onion farmers dig holes faster, so they can plant more and sell more with less back pain than traditional shovels.*

Breaking this down using our questions, we get:

- **What is the product?**

An artificially intelligent shovel

- **Who is the customer?**

Onion farmers

- **What value is generated for them?**

Time saved through faster planting

- **How is it better than the old way?**

Less back pain than traditional shovels

### 3. UNDERSTAND YOUR CUSTOMER

As we've already covered in this book, the best marketing in the world is irrelevant if nobody sees it. The only way to make sure your customers see your message is to understand their behaviors and mindset. Research is cheap, fast and almost free, so doing your homework up front can save a lot of extra work later.

The more specific you are about your target

customer, the easier it is to understand how to reach them and what message should be used to do so. For our shovel company, for example, onion farmers are a smaller audience with different behaviors than do-it-yourself homeowners. That means their needs and habits are more specific, which gives you a huge advantage by narrowing the range of answers for the next questions you need to ask:

- How do my target customers buy products like this today?
- Where do my target customers congregate to be with people like them?
- Where do my target customers get their information personally?
- Where do my target customers get their information professionally?
- Who do my target customers look up to?
- Who do my target customers trust?
- What time of year is most important and relevant to my target customers?

The more specific you can be, the better. If every

onion farmer in the world visits the annual OnionCon, then you should note that down along with who spoke there over the past few years. If they're all listening to OnionPod, you need to note that and listen through the archives to discover what topics they discuss.

#### **4. GENERATE WAYS TO REACH YOUR AUDIENCE**

This one is simple: Dream up all the ways you could reach your audience and write each idea on a giant list. There's no harm in dreaming up ideas, big or small, at this stage, because we'll assess them for feasibility later.

*Here are a few ways we could reach our onion farmers:*

- Buying OnionCon or OnionPod sponsor slots
- Facebook advertising based on interest in onions
- Google ad targeting for the word “shovel”
- Sending sample shovels to all the speakers at OnionCon

Once you've got those, the cold hard reality is next: the numbers.

## 5. WIN ON PAPER

As cheap, fast and easy as it is to dream up ideas, it's the same for making simple models to help prioritize and determine if they're worth pursuing. Doing so involves some thinking about the different paths and steps people might take to buy your product, followed by basic math.

These are our "funnels" and they are informed by every aspect of how the customer might convert, from where they'll find you to the scale of the channel you're using.

*Here's an example for our idea to sponsor an episode of OnionPod, which charges \$1,000 to place an advertisement:*

- 25,000 listeners of OnionPod
- 2% of listeners (500 people) visit your website because of the ad
- 2% of those visitors (10 people) buy a shovel
- \$100 per shovel sold amounts to \$1,000 in sales

From here, subtract all the costs you might incur to create that shovel (manufacturing, storage, etc.) and you've got a rough idea of whether the tactic is

a profitable idea worth pursuing. It also provides a great opportunity to think about ways to optimize.

To do that, you should theorize the outcomes that could change if you improve a specific component of your tactic. Maybe you can create a better advertisement and get 5% of OnionPod's listeners to your website, or maybe you should just charge more for the shovel to make each sale more profitable. As you adjust these factors in your model you'll quickly learn if the math works (or not).

Remember to use conservative assumptions and apply them with rigor to every tactic you're considering. Don't believe your own spin, either; this is a business, not a religion.

When the funnel is in place you should rank each idea by two factors: difficulty (cost, time to execute, feasibility) and impact (revenue, profit, customers acquired). At different stages of your company's growth you'll optimize for different things: maybe now it's customer acquisition, but later it's going to be profitability.

## 6. YOU ONLY NEED ONE THING TO WORK

Big companies need many demand generation

systems with different characteristics of profitability and acquisition to work together for growth. You don't need such a complicated system (yet), so focus on finding just one that works.

When you find something where the math adds up, run that tactic as frequently as you can. Each time you execute on it, you'll remove waste and increase impact.

That first demand generation channel, when working properly, will help you survive, protecting you from the bears long enough to think about the next big idea. When your first system is maximized, or you need to grow even faster, you can refer back to your long list of ideas and add a new test to the mix.

# Prioritizing product announcements

By Matt Hodges, Senior Director of Marketing

**W**hen I started working at Atlassian back in 2008, cloud wasn't yet a thing. Salesforce was just taking off. All of our products at the time were server-based and shipped in a fashion where we would have a big point release probably two, sometimes three times a year.

There would be Confluence 4.1 or Confluence 5.0 – a collection of eight or more features. It was marketing's job to then create a narrative around all those new features. That presented a big challenge because not all the features made sense together.

Sometimes, you'd have a common theme or a couple of themes that you could tell a story around, but what it meant was you'd focus on two to four things, and build a story that we wanted to tell around them. Everything else played second fiddle.

That meant that some of the important things you shipped, which might be more relevant to existing customers than to prospective customers, got lost in all the noise. They didn't make the story, because they distracted from it.

Thanks to SaaS, we've now moved to a world where we have even more things to talk about, on a constant cadence. The challenge then becomes, which things do we shout about? When you're only getting two to three opportunities a year to shout, you shout about all of them. With more opportunities to shout, it's tempting to shout about each and every one of them. But if you do that, people will stop listening to you.



Earlier in this book, I mentioned the famous product-first startup cliche: "If you build it, they will come". I like to say: Announce it and more will come.

Great marketing paired with a great product can equal more than the sum of the parts: Marketing can amplify all the fantastic features your team builds and tell the narrative that motivates action from prospective and existing customers alike.

A screenshot of a Twitter post against a yellow background. The post is framed by a white border with rounded corners and a red outline. It features a profile picture of a person with a pink gradient, the name "Paul Adams" in bold black font, and the handle "@Paddir" in smaller gray font. The tweet text is in black font: "Product and Marketing are one and the same. If you built a great product that no-one heard about, did you build a great product?". Below the text is the timestamp "5:23 PM - 9 Aug 2016". At the bottom of the frame, there are engagement metrics: "10" with a speech bubble icon, "39" with a retweet icon, and "73" with a heart icon.

One of the most important – and **difficult** – challenges when you’re constantly shipping “new stuff” is deciding what to announce and what to just let quietly slide by on people’s radar. Product announcements aren’t the only driver of growth, but they are one of the primary ways to accelerate and generate new growth if you do them right. **That’s why we treat everything we ship as a marketing opportunity.** We don’t announce everything, however.

## CONTINUOUS SHIPPING AND ENDLESS OPPORTUNITIES

Your company’s ability to ship is everything. Our VP of Engineering, Darragh Curran, said it well when he declared shipping the “company’s heartbeat” because it pushes you forward. Shipping touches every part of a company including team morale, motivation and momentum as well as presenting entirely new marketing opportunities.

There is, however, a side effect of continuously shipping that’s new to marketers: having near endless opportunities means attempting to decipher which updates are worth making noise about at all.

If you rewind a few years to the old pre-SaaS way of shipping, marketers traditionally held back features

and announcements until major software versions, perhaps version 1.0 or 1.1 of your software, so it could be bigger than ever.

A great example of this is Microsoft's Office release schedule. Every few years a new box appeared with some bullet points on the back to brag about: Office 2001, 2003, 2007 and so on – if you missed one, the ship had sailed until the next giant release.

SaaS changed the rules of the game entirely: You can ship constantly and don't need to tell all the stories at once. That means you're always on the move, and stories can be told at any time rather than in one big bundle.

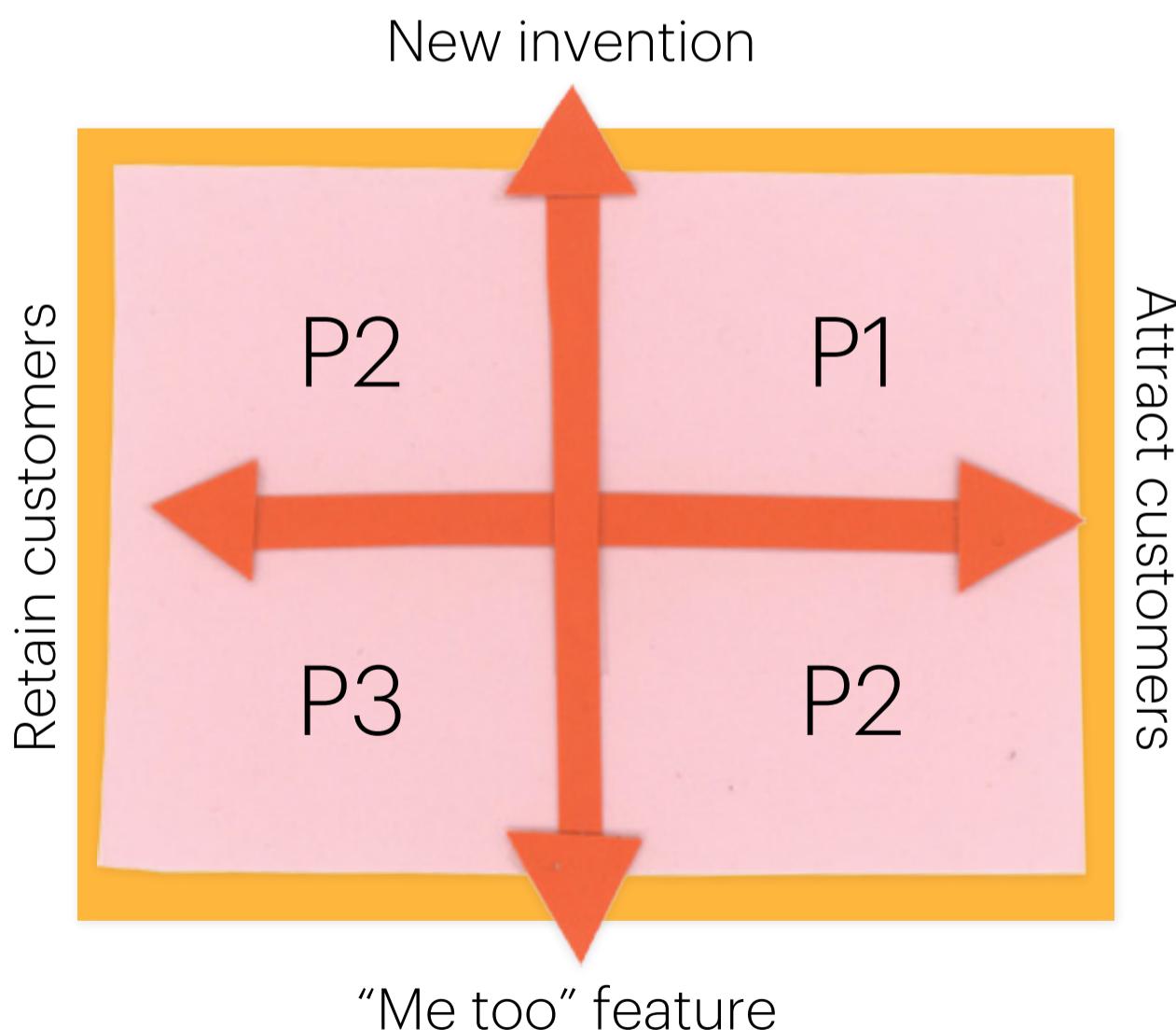
## DECIDING WHAT TO ANNOUNCE

Zooming out, we shipped more than 100 features at Intercom last year. That's 100 new marketing opportunities, and 100 different things that might be important to all customers or just some.

All of our changes, big and small, are communicated via our public changes page, where people can find and learn about even the smallest product improvements. This is intentional so that we're not constantly interrupting our customers, like a smoke

alarm that won't stop beeping when there's no fire. For our bigger announcements we do more to get the word out to the right people.

We created a framework to help us decide if something is worth announcing and how we'll go about it. On one axis is value: Is the change most valuable to existing customers, or does it have the potential to attract new customers? On the other axis is innovation: Are we playing catch-up to existing products already out there, or is this an entirely new solution to someone's problem?



From there, all announcements fall into a quadrant that helps us define what to do with it on a repeatable basis. These quadrants are:

- P1: These are your biggest announcements. The new features that solve problems in entirely new and improved ways. They present the biggest opportunity for you to attract new customers, so you want to be sure to shout about them to the world.
- P2: These are new solutions to problems that are mostly valuable to your existing customers. They're powerful features, but by themselves they are unlikely to persuade a new customer to use your product over an existing solution.
- P3: These are the things you ship to fill gaps in your product or simply improve it. These new features and improvements bring your product up to par with competitors. Existing customers have likely been asking for it, but its absence didn't stop them from buying your product in the first place.

We have an extra rule as well: Often you'll ship a feature that competitors already have whose absence did block potential customers from using your product. These features are an opportunity to attract new customers, so are treated as P2 as well.

You'll notice that P4 is a category missing entirely but we do use it: That's reserved for things that don't fit any of the categories above, but are still worth people knowing about.

	P1	P2	P3	P4
Changes page	✓	✓	✓	✓
In-app messages	✓	✓	✓	
Landing page	✓	✓		
Press coverage	✓	✓		
Email	✓	✓		
Video	✓			

Pictured above is subset of the tactics we employ to announce something new. For example, everything we announce, regardless of size, gets an entry on the product changes page, but we won't create a landing page unless it's P2 or higher.

Media outreach is saved for our highest-priority releases, P1, which are announcements for entirely new products. The list is not a complete overview of

how we execute, but here are some real examples of how we employ each tactic:

**In-app message**: The best way to reach our active customers is by sending a targeted in-app Intercom message. When we released Assignment Rules, which automates conversation assignment within Intercom, it was easy to target this to customers who used that part of the product. If it looked like the user needed that feature based on their usage, we messaged them too.

**Email**: It's still the most effective way to message inactive customers, but we use it sparingly, for our biggest announcements, to bring them back.

**Video**: When you're building a software product, "show, don't tell" is a golden rule. It's an exponentially more efficient way to explain a new feature to the user rather than writing it out in text or a bulleted list of features. Creating good video is hard, but oh so worth it.

**Press coverage**: We pitch the media when there's a story to tell and a big opportunity to generate new demand, but never less than that.

## DON'T BE THE APP THAT CRIED WOLF

When you use this model and decide what to announce as well as how, remember this: The more you shout when you shouldn't, the more people will decide that you're like that smoking alarm or that attention-seeking shepherd boy, and eventually they'll decide it's better to stop listening altogether.

# Using product marketing to help build product

By Rae Lambert, Product Marketing Manager

**S**o you've reviewed the product roadmap and decided what should be announced and what shouldn't. You might assume that you've got some time before you need to start working on the announcement in earnest (the product isn't even being designed yet!). But if you play it that way, you'll be missing out on the secret sauce of a product driven company: the partnership between product management and product marketing.

If my time working in product marketing has taught me anything, it's that this partnership is everything. Rather than working on an assembly line and chucking things over the wall, PM and PMM are playing a team sport. Each takes the lead at different times, but both are always paying attention, supporting each other throughout the entire process.

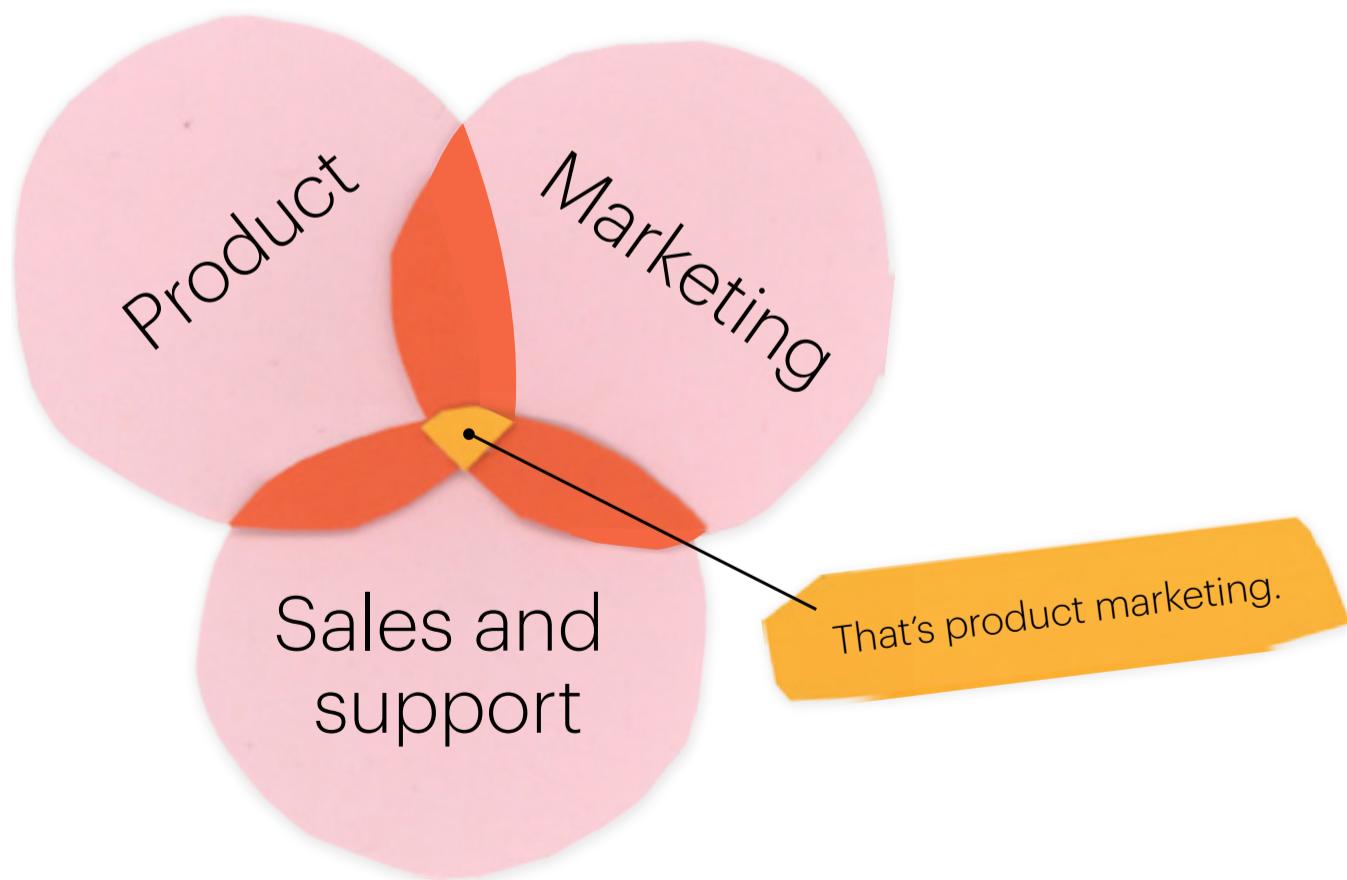
Don't fall into the trap of thinking marketing is only about launching a product or feature. Launches are just the tip of the iceberg – tons of work happens before the landing page is even thought of. In this chapter I'll explain how

product marketing works with product management from the beginning.



There is a popular, but fundamentally wrong, analogy for how product management and product marketing work together: Product managers put product on the shelf and product marketers get it off the shelf.

But the best products are built with a clear market in mind, and product marketing brings that dimension long before there's anything to get off shelves. The real impact of product marketing comes in helping to shape what is built in order to announce a product that truly connects with your customers.



When product marketers are a partner in the full product development cycle, rather than focusing primarily on landing pages and announcements, your yet to be released product is more likely to achieve commercial success. By way of illustration, here's some of the work our product marketers regularly undertake well before a product even hits the market.

### **UNDERSTANDING CUSTOMERS**

Pre-launch, a product marketer's job is to play a key role in defining the target market and understanding the potential customer. You should be asking questions such as:

- What jobs are customers hiring us to do?
- What are the most frequent feature requests?
- What workarounds or unintended use cases are happening in the product?

Whether you're conducting this research yourself or (even better) partnering with a researcher, synthesize it into digestible information for the product manager to incorporate into the roadmap. A good way to do this is by gathering information such as:

- Lost opportunities from sales, e.g., "Why didn't a

potential customer choose our product?"

- Conversation trends from support, e.g., "What pain points are existing customers having with our product?"
- Industry trends, e.g., "Are there other products solving this better than us?"

Once you've collected and synthesized all these data, prioritize them using a matrix like the one below.

Go-to-market matrix recommendation

Example App	User	Buyer	Score
Inviting teammates	Blocker	Blocker	$4 + 5 = 9$
Managing teammate permissions	Hurdle	Blocker	$3 + 5 = 8$
Reporting	Differentiator	Blocker	$2 + 5 = 7$

User: people using the product regularly, 1pt

Buyer: person responsible for purchase decision, 2 pts

Differentiator: nice to have, 1 pt

Hurdle: difficulties that can be overcome, 2 pts

Blocker: something preventing us from competing effectively in the market, 3 pts

## COMPETITOR RESEARCH

It's not hard to find examples of better products

losing to better marketing strategies. Take a look at the format wars between Betamax and VHS, or more recently between HD DVD and Blu-ray, and you can see that having a better product doesn't guarantee you will come out on top.

In the very early days of your startup, competitive intelligence will help give your entire product team a deep understanding of the market. Product marketing should take the lead here and conduct competitor research to understand which features are must-haves for customers to buy or switch and which ones could help tell a compelling story. Here's some questions you should be asking:

- Are there other companies doing exactly what we want to do?
- What functionality is industry standard that we believe is fundamentally flawed?
- What should we build to have a working product that competes?
- What should we build to differentiate the product and leverage our platform in a way that only we can?

Having this data and feeding it back to the product team will help everyone understand your own

product's context and bond the team together against your biggest competitors. Here's a [simple competitive analysis tool template](#) you can use to get the ball rolling.

## PROBLEM STATEMENT AND SOLUTION STORY

Once something makes it onto the roadmap and it's time to start working on it, our product managers write the problem statement – thoroughly outlining the problem that needs to be solved. Our product marketers respond with the solution story – the ideal story we'd tell that convinces prospective customers to buy or switch.

A lot of startups wait until after the product is built to start crafting this story, when in fact it can happen long before you ship anything. Just take a look at Hyperloop, supersonic trains that can whisk both passengers in giant pneumatic tubes at speeds of many hundreds of miles per hour. The story they told, one that would reinvent transport forever, was so compelling that they managed to raise over \$200 million before they had even performed a single test. No one knows if and when their story will come to pass, but they had done enough to make sure the story firmly stuck in the public's mind.

From Hyperloop's website:

*"Sci-fi writers and dreamers have long envisioned ways to travel at high speeds through low-pressure tubes. The idea was simply waiting for the right combination of talent, technology, and business case to become a reality...Hyperloop will reinvent transportation to eliminate the barriers of distance and time and unlock unprecedented value for governments, businesses, and consumers."*

Your product might not be trying to reinvent the concept of time but you can use stories such as these to get buy-in from the product team. If resources weren't constrained, what could we build that would help us achieve this story?

When you're discussing what to build next, we use stories such as these to help prioritize feature scoping and resolve conflicts about priorities.

### BETA TESTING

For many startups, beta testing is often seen as the responsibility of the product manager. But without a strong definition of your ideal customer, it becomes too tempting and too easy to hand out beta accounts like candy. By looping in marketing early, you'll make

sure that you're identifying the right customers to join your beta.

Finding the right balance of use cases, company sizes, industry clout, and customer need is incredibly important; ideally, beta testers will become your first testimonials. The beta period also gives you the perfect opportunity to field test your messaging. Understanding their experience and feedback will help inform your announcement.

### END-TO-END USER EXPERIENCE TESTING

A good product marketer will understand the entire customer journey better than anybody else in your company. They'll know what happens before a customer buys, when a customer is buying, and what happens after they sign up. This 360-degree view of the customer is **invaluable** at a startup.

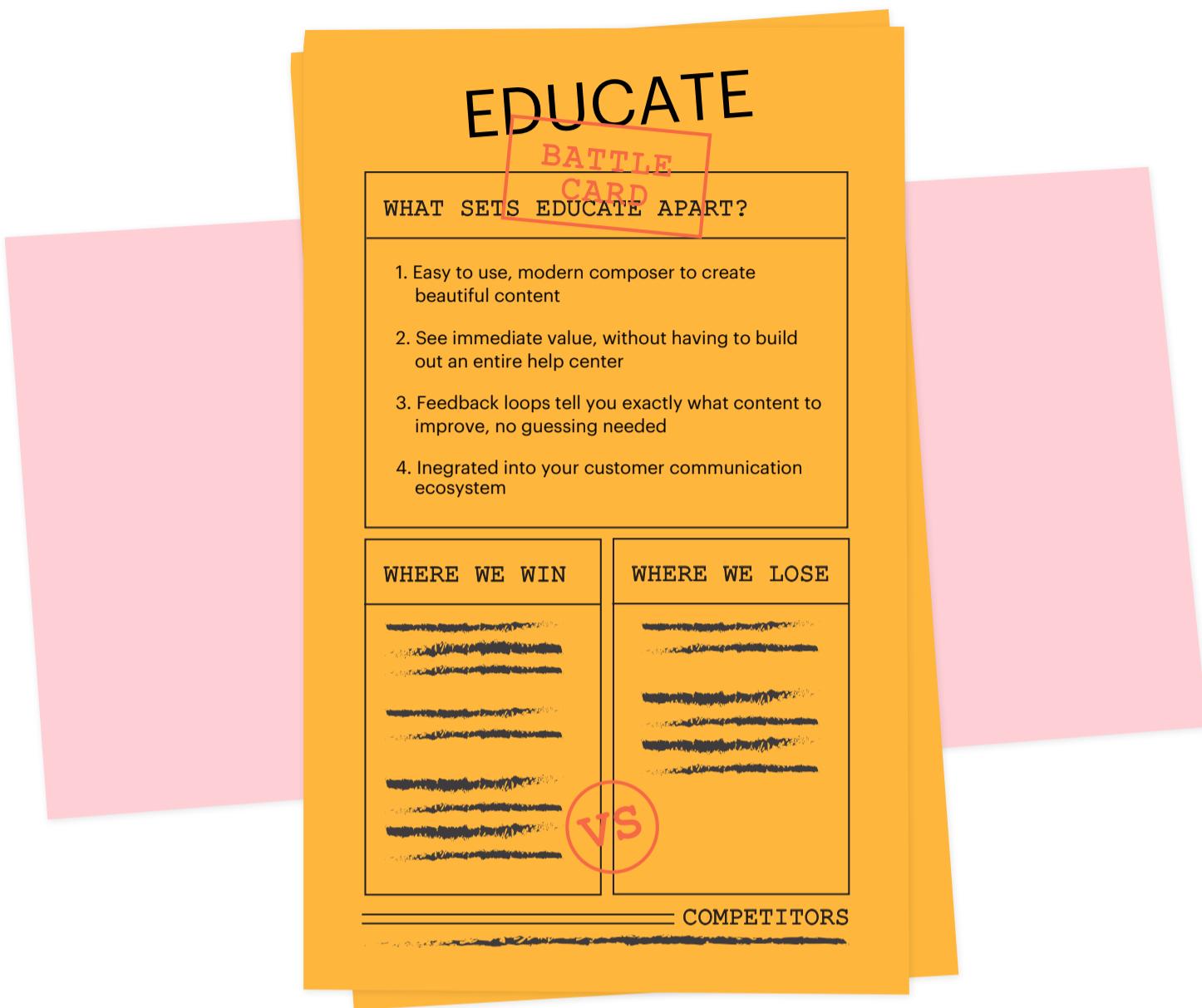
For example, if the experience will start with an ad leading to a landing page, leading to a shopping cart, then leading to the product, they can make sure that this experience is consistent throughout. Separate teams will likely be responsible for the different segments of the experience, but the experience shouldn't feel segmented. Marketing will make sure

the handoffs are cohesive, clear and concise.

## TRAINING TEAMMATES

As well as getting your positioning and messaging just right, product marketing can make sure everyone at the company knows what those are. Your product's positioning will stick only when everyone is on the same page, so it's vital to get buy-in and teach these key messages throughout your startup before your product hits the market.

You can do this in various ways. You can do it "town hall" style, which gives everyone, across sales, support and finance, to ask questions. The product manager can demo the product while the product marketer shares the pitch to communicate the value and how you compare to the competition. To help with this, we create and share "battle cards", a cheat sheet for what sets our product apart, where we win and where we lose.



Product marketing at a startup goes much deeper than sales enablement and marketing campaigns. It starts with crafting the story when the problem is defined rather than waiting until the solution is built. While activities and tactics will constantly evolve, the goal is always the same: help build and announce product with the market in mind from the very beginning. That way, when it finally makes it to the shelf, it won't stay there long.

# Mastering a successful product launch

By Jasmine Jaume, Senior Product Marketing Manager

**O**ne thing every startup needs to do is product launches. Launches are exciting; the planning, the build up, the feeling of all working toward the same goal, the rush of joy and fear as you finally share what you've been working on with the world. But more importantly, launches are one of your best opportunities to drive brand awareness and ultimately generate new customers, so it's worth taking the time to get them right.

Launches can seem daunting, especially if it's your first one or you don't have a dedicated product marketer. And yet, despite the fact that hundreds of new products and features launch everyday, it can be hard to find much content or advice about how to actually 'do' a launch. There's plenty of advice about the 4 Ps of marketing, how to define positioning and how to create certain assets, but very little on where to start and how to run a launch successfully.

In my career as a product marketer, I've planned more launches than I can count – some big, some small, some

successful and some less so. Through those experiences, I've learned that it's not just the positioning and tactics that contribute to a launch's success; how you get from the start of a project to launch day is just as important. Here, I'm sharing some tried and tested steps for mastering a successful launch to help give you a head start.



Once you're confident that you're building a product people actually want, it's time to start planning your launch. While the launch is just the start of marketing a product or feature, you'll typically only get the opportunity to make a big splash once, so it's absolutely critical you make the most of it.

Nothing kills a launch quite like inconsistent messaging. It quickly leads to confusion ("Wait, what is it you've launched?") or even suspicion ("It doesn't seem like you know the benefits of your product, so why should I care?"), which in turn leads to prospects giving up and your launch fizzling out before it even got going.

For a successful launch, your marketing, sales and support teams need to work as one. Every touchpoint, whether it's an ad, an email, a sales call or a chat with support, should reiterate the

same benefits, same differentiators and same key messages; don't let your marketing become a disparate jumble that makes little sense to your customers and prospects.

So what's the secret? **Coordination** and **communication**.

I know, I know – those two words aren't exactly sexy, but regular, transparent communication comes above all else in a successful product launch.

That doesn't have to mean getting bogged down in tons of process. Some lightweight steps go a long way, and I'll share some that we use at Intercom. They're by no means perfect or set in stone – they are living, evolving processes that will continue to adapt and change as we grow and learn. Nor is this a full list of every step in planning a launch (that could be a whole book in itself) but you should use these as a starting point for keeping your launch organised, consistent and on track.

## The Product Launch TL;DR

1. Have clear owners + stakeholders
2. Set clear, realistic timelines
3. Prioritize the most impactful marketing tactics
4. Get launch assets ready and everyone on the same page
5. Launch

### **STEP 1. IDENTIFY OWNERS AND STAKEHOLDERS**

Typically, product marketing managers (PMMs) “own” a launch, but if you don’t have PMMs yet (get one, soon) designate one person as the owner to drive the launch. This doesn’t mean that person is necessarily doing all the work, but it does mean they’re ultimately responsible for ensuring messaging is consistent, activities are on track and the right people are involved and doing what they should be, when they should be.

Then, identify the key stakeholders in product, sales, support, design and other areas of marketing if you

have a larger team. These stakeholders should act as the “bridge” between you and their wider teams to distribute information, gather feedback and represent their team’s progress and needs.

For bigger launches, someone on your leadership team will almost certainly want to review plans or assets at certain stages. Make sure you know who they are and involve them early to avoid the risk of last-minute changes that could throw your launch off track.

## STEP 2. SET TIMELINES

We typically start planning launches two to three months in advance, although it varies depending on the project and size. I’ve run launches with as little as two to three weeks’ notice, but I wouldn’t recommend it! As a rule of thumb, as soon as you know about something the product team is working on, you should liaise with them to get an idea of when it’s expected to be ready to launch. Don’t wait for the product team to come to you; it’s in your interests to get as much information as early as possible.

Then, you’ll need to take into account how much

time each team needs to prepare for the launch, as well as other things that could effect your launch success, such as holidays, major announcements from big brands that might make press coverage harder and so on. Once you have this information, you should be able to agree with your team on a target launch date.

As well as the launch date, we also agree another milestone with our product team, called “UI Complete”. This is essentially a cutoff date for front-end changes. Back-end work can continue, but all visible work needs to be complete so our marketing team can start creating product videos and assets without fear that something in the UI will change without notice – which would cause a huge amount of additional work and last minute stress.

This date is always going to be a compromise; product invariably wants more time to build; marketing wants more time to create assets. Once you’ve found the middle ground, make sure everyone knows the date and sticks to it.

### STEP 3. CHOOSE YOUR TACTICS

We discussed some typical launch tactics earlier in

the book, but you should work with your stakeholders to define which tactics you want to prioritize, especially if you have limited resources.

It's better to focus on doing a few things really well than spreading yourself too thin, so prioritize the activities that are most effective for you. This might require some trial and error to figure out, but you'll get a better idea the more launches you do. If you haven't done any launches yet, taking a look at what others in your industry do can be a good starting point. And don't assume that your tactics require a large budget in order to succeed. ProductHunt is totally free yet is one of our biggest drivers of traffic on launch days.

Once you've decided on tactics, make sure they're documented in one place, along with their owner and status, so everyone involved can follow the progress throughout the launch. This could be in a project management tool, but we use plain old Google Sheets. When it comes to product launches, simple often works best.

#### **STEP 4. GET, AND KEEP, EVERYONE ALIGNED**

For a consistent experience across touchpoints, it's

essential that everyone is aligned on the messaging and positioning for the launch.

We use a positioning exercise called “build-a-box” that involves product marketing managers, product managers and designers imagining the product is in a physical box on a shelf, and coming up with the messaging you might use on that box. This is then discussed and refined to final messaging that’s used as the cornerstone for all our marketing efforts.

One of the outputs from this work is a “solution guide”. This is an internal guide that can be used by anyone in our company – be they marketers, salespeople or engineers – to quickly understand the positioning, as well as additional information about target audience, common search terms and competitive intelligence.

It should be used as the foundation for all your launch messaging as well as your internal training, so all your teams stay aligned and marketers can optimize outreach activities.

As you move into the execution phase, ensure everyone stays on track with weekly stakeholder meetings. The first of these sessions should act as a kickoff, with each stakeholder explaining their team’s

planned activities and timelines for the launch.

Following syncs should be short – typically 15-20 minutes – with a quick rundown from each stakeholder on the status of their activities, including any blockers or at-risk items.

Each stakeholder has one slide, which they update before each meeting, listing their activities. For example, PMM’s slide might look something like this:

### PMM - Jane Jones

- Solution Guide
- New landing page
- Announcement video
- Announcement blog post
- Announcement email campaign
- Customer testimonials
- Updates to existing landing pages
- Sales training demo
- Sales collateral
- Post-launch webinar

- On track / ready
- Behind schedule
- At risk
- Not started

These syncs are invaluable for keeping everyone aligned and giving everyone visibility on what others are working on, where there might be overlap or opportunities for collaboration, and any potential blockers or risks. We also set up a dedicated Slack

channel so there's always space for updates and questions.

### STEP 5. READY, SET, LAUNCH

Communication is most crucial during the countdown to launch day, as you're busy getting things finalized. Ensuring everyone knows what is happening when on launch day helps make sure everything rolls out smoothly. You don't want to ruin all that hard work ensuring consistent messaging with a too-early tweet or a campaign going out before the landing page is live!

This is where the plan of attack comes in. Agreed to in the week leading up to launch, this doc details all the steps needed to roll out the launch, when they should happen and who owns making sure they get done – including features going live, QA, email campaigns being switched on, social, content, ads and so on.

On launch day, stakeholders sit in a physical “war room” and make their way through the plan of attack, crossing off steps as they’re completed. Updates, blockers or important notes are discussed in person in the room and noted in the Slack channel. Once

everything is crossed off, it's time to crack open the champagne.

Of course, there will be plenty more to do after the launch (read on for more on that!), but it's good to take a moment to celebrate and reflect on how the launch went. And then get ready for the next one.

# Life after launch: learning and iterating on your marketing

By Greg Davis, Group Product Marketing Manager

**W**hen you ask people what product marketing is, the first thing that comes to mind is usually “product launches”. This is a fundamental misunderstanding of the role of product marketing. Launches are the beginning of a process rather than the end.

Our product team has a saying: “Ship to learn.” When you launch a new product, you really can’t predict how people will use it. Only after launch do you learn what’s working, what’s not and how you can iterate quickly from there. The saying provides a useful reminder for product marketers that launching a product is not the end goal. Crafting the perfect message, pricing and positioning is.

Don’t get me wrong; as we’ve seen in previous chapters, launches are a big deal. They shape your customers’ and prospects’ first impression of your product or company. They take a tremendous effort to go well. But no matter how much

research you do and how much sweat you put into the launch day and the messaging that goes along with it, there are things that you can do better or differently. That's fine as long as you look at launch day as just the first step in the process of getting it right.



If you work in marketing, you know the drill. You've just launched your product and now it's time to pat each other on the back and wipe your hands clean as you head home. The hard part's over. You launched

The reality is that you aren't done. Your launch is only the start of the marketing journey, not the end goal. It's now time to begin a cycle of listening, learning, iterating and shipping improvements based on real customer feedback rather than your assumptions.

## WHAT HAPPENS AFTER THE SPIKE?

My perspective on product launches comes from how we break down the role of marketing at Intercom. Our product marketing team has four core responsibilities that all contribute to different stages of the marketing/sales funnel. The product launch touches on the first three of them.

## Reach

Get our messaging in front of the right audience

## Attract

Get that audience to visit our site and become leads

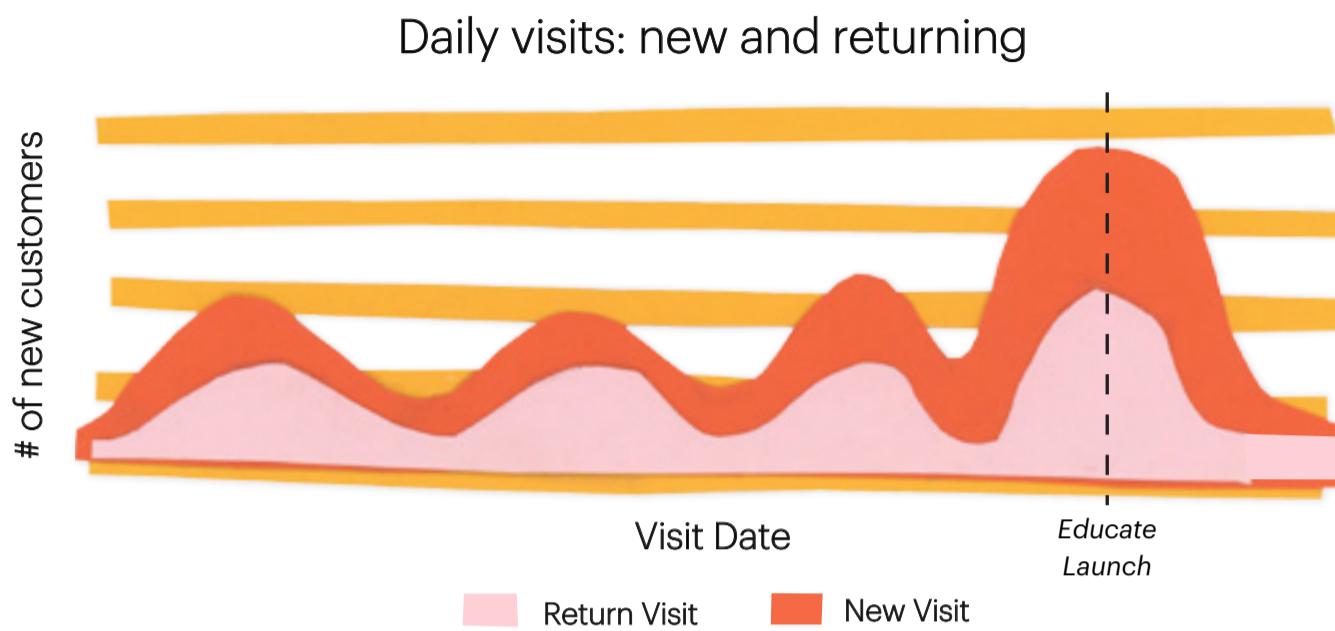
## Convert

Persuade leads to sign up and become customers

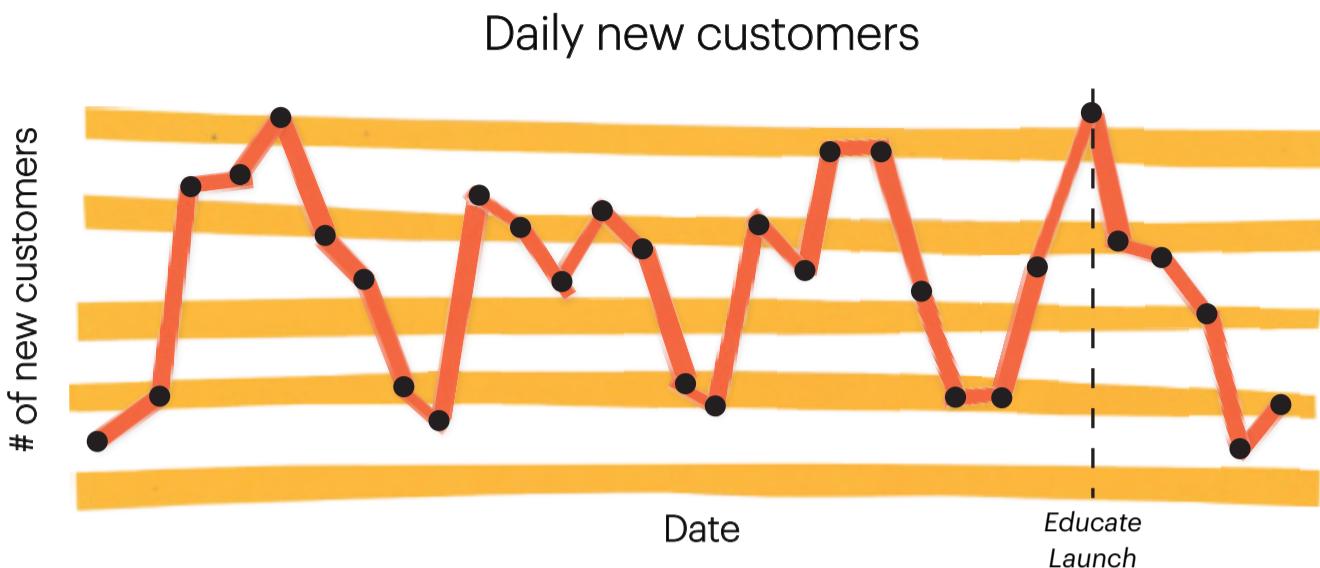
## Educate

Help customers get increasing value from and love our product

Launches produce spikes in traffic that look great from a “reach” and “attract” perspective, but when you travel further down the funnel things tend to look less rosy. Product launches aren’t highly targeted, and the bulk of their traffic comes from people who don’t end up buying. For example, here’s a peek at traffic generated by the launch of one of our products, Educate. It resulted in a record traffic day, but this was short-lived and returned to normal levels fairly quickly.



Rather than focus on the “reach” and “attract” stages exclusively, it’s important to measure the success of your product marketing across every stage of the funnel. If an increase in traffic doesn’t translate to an increase in conversions (new signups, upgrades or cross-sells), then your launch hasn’t been successful, and you need to understand why. For example, although traffic increased with the launch of our Educate product, it did not bring in significantly more customers.



A product launch gives you a vast data set from which to learn, iterate, test and fix your messaging across the entire customer lifecycle: from announcement email to landing page to onboarding flow and shopping cart. These small changes you make after launch quite often drive more product adoption than the launch itself.

### THE POST-LAUNCH FEEDBACK LOOP

After the launch, product marketing's job is to identify confusion or issues that might prevent people from buying the product.

#### 1. Listen to the unfiltered response

Before the launch, you have a set of assumptions about who you're selling to and why it matters to them. After launch, that picture becomes clearer.

The launch turns on a firehose of qualitative and quantitative feedback and, as hard as it is, your job is to listen to it all without reacting (we'll look at that in more detail in step 2). After all, you might find that the biggest issues aren't with the product itself, but with everything surrounding it.

**Some ways you can collect qualitative feedback after launch:**

- Work with customer support to uncover the most common areas of product confusion.
- Sit in on sales calls to hear follow-up questions asked after a demo.
- Monitor social media mentions.

**Some ways you can collect quantitative feedback:**

- Run Google Analytics reports that illuminate where users came from, where they went next, etc.
- Collect click-through and scroll data with Inspectlet.
- Work with a product researcher to conduct user tests of the page.

- Use tools like [Idiomatic](#) to gather user feedback from conversations with your support team.

It's up to you to collect as many opinions as possible from both inside and outside your company. At this stage of the process, any and all opinions are valid, so shoot for breadth. Then it's on to categorizing those data points and prioritizing follow-up action items.

## 2. Make sense of the feedback

Once you've gathered post-launch feedback, how do you organize it all? I like to start by grouping feedback into broad categories like "pricing" or "messaging" and continue to get more specific as subthemes emerge. For example:

**Consistent customer support issues:** This includes bugs, setup issues and integration issues.

**Landing page engagement statistics:** This includes the number of people clicking your call to action, understanding what your product does, scrolling all the way to the end and generally engaging with everything you worked to put on your landing page.

**Pricing confusion:** This might come through feedback that your pricing is too high, complicated

or unjustifiable. Others might ask for a free trial.

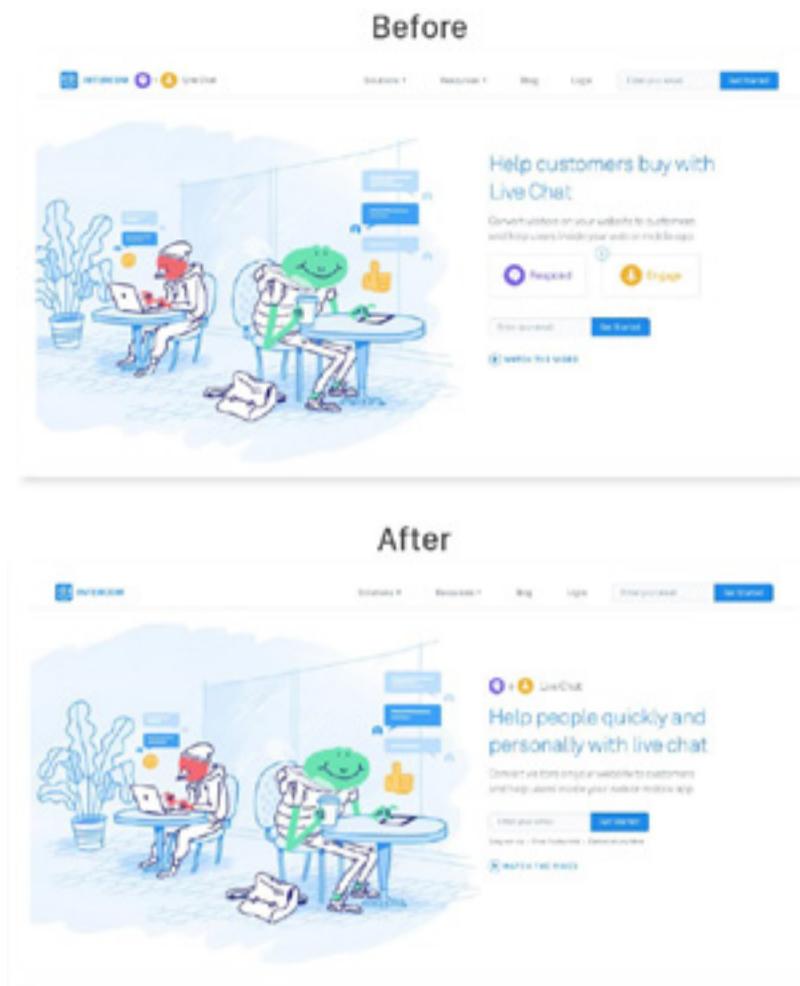
**Conversion issues:** Are people signing up but not installing? Canceling after the free trial? All of this should be documented and grouped in a bucket.

**Customer churn:** Document the characteristics of canceled accounts. Patterns will likely emerge. For instance, if everyone churning is a three-person startup and your product is meant for enterprises, maybe you're targeting the wrong audience.

As you may have noticed by now, much of what you learn post-launch is outside the traditional realm of product marketing. But product marketing shouldn't just be about creating a message that resonates. It's part of a system of how a product is received and consumed at every stage of the sales and marketing funnel.

### 3. Ship continuously

In the same way that design and engineering continue to iterate on their product after launch, it's important for any marketing team to continuously improve their messaging. Iterating toward the right message prevents you from spending time and resources effectively relaunching your product.



For example, we recently introduced a concept called “Solutions”. Solutions are made up of one or more products that work together to solve a customer’s Job-to-be-Done. This was a new concept that we wanted to make sure people understood, because otherwise it could create major confusion with prospective customers before they even signed up.

So when we shipped one of our new Live Chat for Sales solution pages, we learned through user testing that it was less important for salespeople to understand all the features that made up the solution

than to understand how the solution benefited them by providing a better way to sell. Had we turned our back after we launched, we would have been saddled with messaging that simply wasn't resonating with prospective customers.

### TAKE SMALL, THOUGHTFUL STEPS

It's natural to focus on a launch date: A huge amount of work goes into coordinating efforts between your product, support, sales and marketing teams to have everything in place for the big day. But as a marketer it's a mistake to take your foot off the pedal when you get the product or feature into the hands of customers.

The product marketing journey begins when you launch. Crafting the perfect message, pricing, user experience and more continues with small, thoughtful steps throughout the life of the product. It's tempting to chase after the next shiny product launch, but it's important to keep iterating on what's already out in the world. **You never get it right the first time.**

# So you want to build a brand

By Stewart Scott-Curran, Director of Brand Design

The nature of marketing at a software company is that it's easy to have a highly data-driven view of everything you do, and overlook hard to measure things like brand. This leads to a tunnel vision focus on optimizing funnels and growth hacking button colors, and ignores investing time in equally important tasks, like creating emotional connections with your customers.

I've been lucky enough to work at two of the biggest brands in the world – Nike and Coca-Cola – who pour millions of dollars into brand building tactics like TV and outdoor advertising. If you looked at these numbers in a spreadsheet it might look like money poured down the sink, but what they both understand is that seeking emotional connections with customers cultivates more meaningful, sustained relationships over time. To help you do just that, I've put together a few principles I've learned about branding that will point any startup in the right direction.



The words “brand” and “branding” get thrown around a lot these days. When people talk about a “brand”, they’re usually referring to something tangible, a design artifact like a logo or an advertising campaign.

Your brand is not your logo. Your brand is not an identity system. These items are all important identifiers of your brand, but they are not the brand itself. Your brand is actually much more than that. It’s how people “feel” when they visit your website or read one of your tweets or emails. It’s the emotional connection you establish with your customers and those whom you would like to become customers.



“Your brand is what people say about you after you leave the room”

- Jeff Bezos

Take the beverage industry as an example. When you think about Coca-Cola, what emotions and feelings come to mind? Comfort and happiness? For Sprite it’s probably intense refreshment. For Hennessy

Cognac it may be luxury. For Red Bull it's likely energy, focus and performance. Your brand is the set of expectations, memories, stories and relationships that accounts for a consumer's decision to choose your product over another. It's why people choose Coke over Pepsi, or Sprite over 7-Up.

Even though your brand can seem like a weird, mystic force that surrounds your business, it can be controlled and managed. You can't directly control people's emotions, but you can control what your company looks like, what it feels like and the attitude that it projects to the world. Ultimately it's these projections that will make your customers fall in love with you and keep them coming back for more.

In order to do this, you need to start by working consciously on the three pillars that constitute what your brand stands for:

Brand values

Brand voice

Visual identity

## BRAND VALUES

Values stand at the very core of your brand. They're the foundation from which everything radiates – including your brand's visual design, voice and relationships. Which means they're pretty damn important.

**“To me, marketing is about values.**

This is a very complicated world, it's a very noisy world. And we're not going to get the chance to get people to remember much about us.

No company is. So we have to be really clear on what we want them to know about us.”

– Steve Jobs

Your brand values are closely tied to your mission and vision. What type of company are you, and what do you stand for? The mission of Nike, one of the biggest brands in the world, is: “To bring inspiration and innovation to every athlete\* in the world. (\*If you have a body you are an athlete).”

Flowing from their mission, they have a series of brand values that guide all their decisions. These are more tactical and speak to how they actually

approach doing the work in certain areas of their business.



These values set the tone for everything Nike does, and the company consistently delivers on them throughout all their marketing and their products.

It's also worth noting that your brand values are a

great opportunity to express who you are not as much as who you are. Being aware of what to avoid is equally as valuable as what to aim for, and will help people understand what sets you apart from your competitors.

"When you write like everyone else, you're saying, 'Our products are like everyone else's.'"

Would you go to a dinner party and repeat what the person to the right of you is saying all night long?

Would that be interesting to anybody?

Why are so many businesses saying the same things at the biggest party on the planet – the marketplace?"

– Jason Fried

For instance, because Intercom is a brand whose values are all about cultivating meaningful relationships with customers, we make sure to explicitly say that we reject spammy, transactional communication, "growth hacking" and all the tactics that come with that. There's a push and a pull to a set of thoughtfully written brand values and they should push away the wrong types of behaviors and tactics as well as pulling the right ones toward you.

## BRAND VOICE

Simply put, your brand voice is the consistent expression of your brand through the words you use and the sentences you write. Your voice appears everywhere you use words:

- Selling or marketing your product and brand – on a call, at an event, on your site or on your blog
- Helping people use your product – guiding them through the product itself, in a support conversation or in a help article

Your brand voice should be intimately tied to your brand values. For example, if you want to be a friendly and approachable company, as Intercom does, a tone of voice that sounds aggressive and aloof is going to turn potential customers off. If you are a large multinational like Oracle, adding gifs and emoji to your messages is probably going to leave people scratching their heads.

A good way to start is by writing down a list of attributes of your company's voice in a way that feels human. It's even better if they're written in a "this but not that" way. For example, "informed but not condescending". Or "edgy but not offensive".

Mailchimp does this well. They describe their brand as:



It's equally important that this voice is carried through every single touchpoint of your business, across brand, product and support channels. To the customer, it should feel like the same person is talking to them the whole time. However, it's important that voice changes depending on the

context.

When a company's voice and tone stay exactly the same all the time, its content comes across as insincere and automated. Think about it like a McDonald's: You expect a Big Mac to taste the same no matter where you are in the world, but you also expect plenty of individuality tailored to each location ([Halloween Choco-Pumpkin Fries, anyone?](#)).

## VISUAL IDENTITY

These are the tangible elements that will determine how your brand is perceived visually, from your logo to your illustration, photography, image treatment, typography, color palette, etc. Your brand identity is what sets you apart from the endless sea of competitors and shows your customers what they can expect from working with you, so you'll need to make some decisions on how some (or all) of these elements should look early on.

Like your brand voice, your visual look and feel should reinforce your brand values. At Intercom, for example, we employ a friendly illustration style and softer color palette to explain our products and how they can help your business. We also use a serif font,

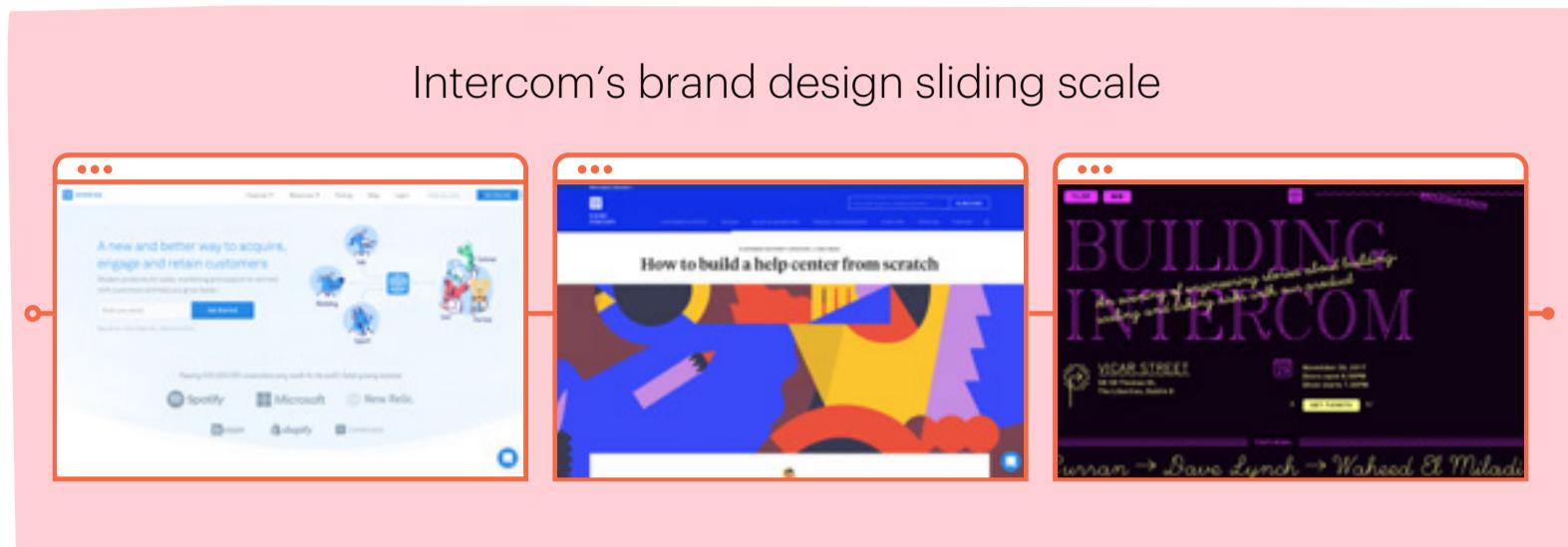
which feels informative yet approachable. Contrast that with how the message might feel – colder, more aloof – if we used a sans serif font.

It's important that your brand's visual identity is carried through the customer's end-to-end journey. Even though different people or teams may work on these, your customer's experience should be as seamless and consistent as possible. Consider the visual simplicity of Apple's branding, which is aligned with the functional simplicity of their products. Their ads, their packaging and even the products themselves all feel quintessentially Apple.



However, as with your brand voice, there's a very real risk that consistency can become repetitive. It's useful to think about your visual identity on a sliding scale that you can dial up or down depending on

what you're producing.



At one end is the most conservative version of your identity. You might employ this when talking about your products or explaining your pricing structure. At the other end of the scale is a version allows you to make much more risks. You might employ this when hosting an event, for example.

Getting these three pillars right is not a simple thing. It involves people from across your startup – writers, marketers and designers, not to mention your leadership. But as Des mentioned earlier, if you don't tell potential customers who you are and what you stand for, well, they'll just decide that for themselves. Now that you have a better understanding of branding – what have you done lately to shape that perception, and be memorable?

# How people buy your product

By Des Traynor, Co-founder

Every business should have an active interest in why people buy their products and the situations people find themselves in before they become customers. The **Jobs-to-be-Done** methodology has always helped us understand the triggers that lead people toward Intercom, but it was a session between myself and Matt in front of a whiteboard where it all started to click. We were trying to work out how to frame a product and what level of abstraction to use for it, and we were arguing about “what people are looking for”.

We talked earlier about Theodore Levitt’s famous quote: “People don’t want to buy a quarter-inch drill. They want a quarter-inch hole.” This is true, but some people are so familiar with their problem space that they’ve already made up their mind that they want a quarter-inch drill, and they’re actually going to go searching for a quarter-inch drill bit, not “hanging a frame”. Meanwhile, other people who haven’t fully diagnosed their problem yet will be searching Google for “how to put a hole in a wall”, and will need an entirely type of marketing. And then a whole other set of people will be much further up in the abstraction and be looking for products to help them hang a picture.

It was only when Matt and I mapped out all the ways that Intercom could be pitched that we got a better understanding of the different roads that led people to our product, and why we needed marketing that catered to all of them.



Marketing works best when it connects your customer's description of their problem with your product. But not all your customers understand and describe their problem in the same way. You need more than one way to frame your offering.

If you're in the Trello/Asana/Basecamp product space, you could try the specific but same-y "Project management simplified", or you could try the visionary but vague "Better collaboration for everyone".

The former is direct and attracts only people who already know they need to manage their projects better. It doesn't grow the market for project management tools, it just speaks to the pre-existing demand for them.

The latter is broad, and will attract anyone who thinks they should collaborate better. This grows the market to include people who didn't realize they needed such a tool. It also attracts people who don't even

think they work on projects.

Cennydd Bowles once wrote, “I want a spade, not the experience of digging,” to show how marketing often drifts too far into the clouds. Some customers know how to solve their problem, some customers don’t, some don’t even think they have a problem. But they’re all potential customers and you need a way to connect with each of them.

## FOUR WAYS TO SELL YOUR PRODUCT

Customers have many different starting points, but it’s important all roads lead to you. The job of marketing is to build these roads. For example, here are four ways people can end up using our Acquire product.



## 1. Problem based

These customers speak only in the language of the business pains they feel. When you're marketing to these customers remember your indirect competitors play a role here. Everything from A/B testing tools to growth hacking conferences offer to "boost your conversions". Education is needed to convince problem-based customers that your product is the most likely to solve their problem.

## 2. Category based

These customers are drawing a conclusion from their problem. They think they know what type of product they need. In these cases you're either looking to establish brand preference (so they believe you're the best in this category), or to take the brand relevance approach (you create a new category in which you are the only player).

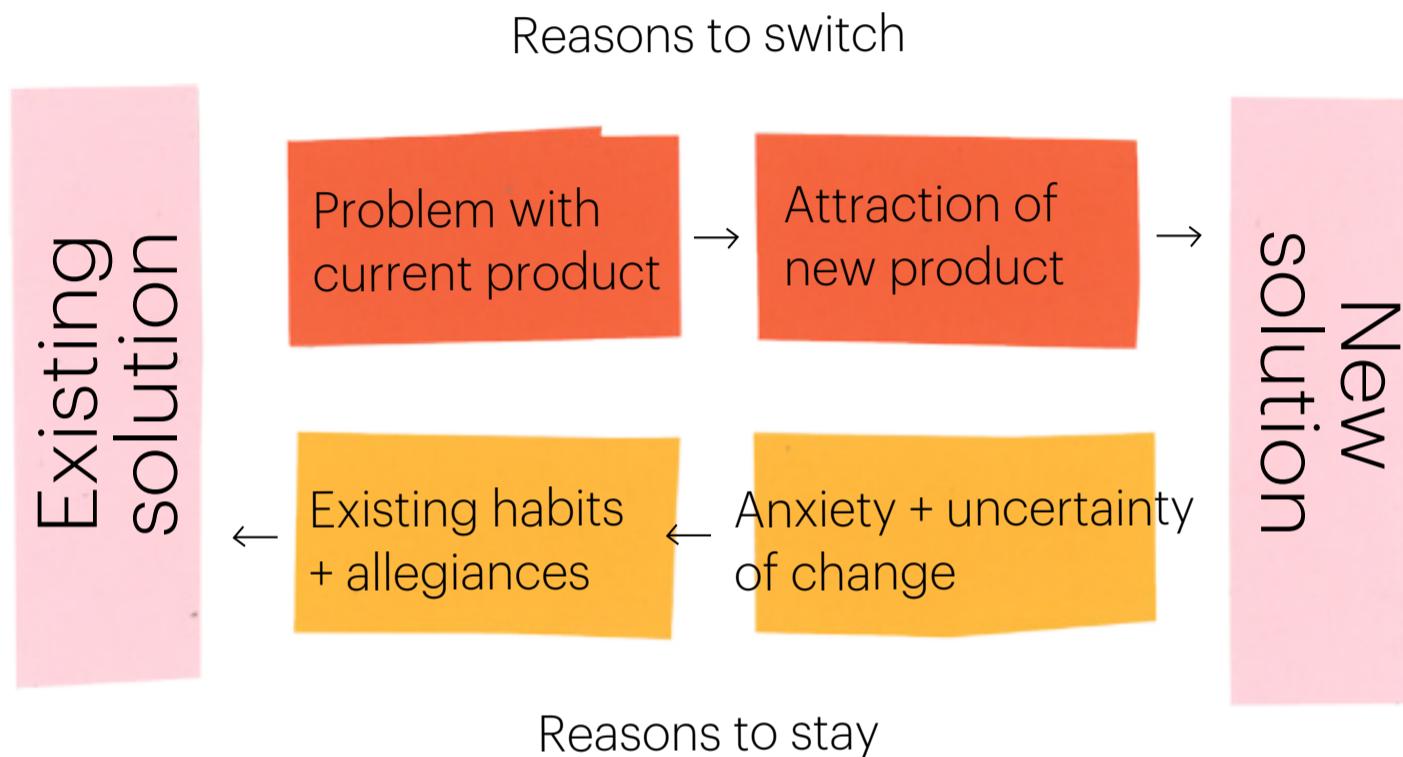
## 3. Competitor based

Happy customers don't shop around. They have better things to do. So when someone is searching for an "alternative to X", they want a better version of what they have today.

When someone is unhappy with their current

product, you can market your product around how much better it is than their current solution.

Here, you need to understand the four forces pushing and pulling people away from your product.



Once you understand these, you can build dedicated marketing pages or advertisements that explain why you are different than their current solution (as opposed to just re-hashing your usual marketing).

#### 4. Brand based

Frisbee, Kleenex, Google, Biro, Band-Aid. They're everyday brands with relevance so strong, they define their categories. The connection between the problem and the brand has become hardcoded in customers' minds. When someone sneezes they

think “I need a Kleenex”, not “My current problem is a runny nose, how do I resolve that?” or “I believe I require a product from the face-wipe category, I wonder what is the optimal solution?”

If you’re not the brand of preference and you’re competing against a product synonymous with the solution, you have a long road ahead of you. You’ll rarely win a direct head-to-head with an incumbent, so you need to identify footholds for initial traction.

This niche to win strategy can be seen in everything from software products to fast moving consumer goods. There were lots of messaging apps, but only one “messaging app for teams”. There were lots of payment platforms, but only one “built for developers”.

As you grow you can deploy competitive marketing to help customers see the migration path from their current solution to yours.

To believe there’s only one way to market your product is to believe that there’s only one type of customer, in one type of buying state, that you want to attract. In software this is simply never the case. So having a plan for these four starting points is the foundation of any marketing strategy.

# Marketing your product to your new customers

By Ruairí Galavan, Manager of Product Education

You're unlikely to find plastic chairs or ripped magazines in a Lexus showroom, as you would in any regular car dealership. Instead, customers are treated to lounges and putting greens. Lexus know that for their customers, or "guests" as they like to call them, marketing doesn't stop once the check is signed. A Lexus owner gets the same silver service as a prospective one. The result? The average lifetime value of a Lexus customer is \$600,000.

So why should software be any different? Too often we blow the budget on acquiring new customers only to promptly ignore them once they sign up. The reality is that best marketing strategies drive not just sales, but also long-term customer success. And that all starts with education.



As you fight for your first customers, you will employ numerous marketing tactics to acquire them: blog posts, paid advertising, landing pages, hero videos, webinars, everything but the kitchen sink. If you're lucky, the signups will start pouring in. Time to put your feet up and wait for the dollars to roll in, right?

Not so fast. Most of those new signups will look at your product once and, for a multitude of reasons, never come back. You just embarked on a big marketing campaign and spent all that time and money getting them in the door, only for them to see no value in your product and walk right back out again.

And for the ones who decide to stick around a little longer? You're on borrowed time with these folks too. Just like the old adage "If you build it, they will come" isn't true for the large majority of startups (spoiler: they won't), neither is "If they sign up, they will use it". Many of your new signups are just kicking the tires, and if you don't show them how to succeed, don't be surprised when they simply walk away.

## BOOTSTRAPPING “PRODUCT EDUCATION”

When I first joined Intercom, my role didn't really have a name. I wore many hats. I wrote our docs,

hosted our webinars, created our help videos and managed our outbound messaging to customers. The goal was simple: to create and distribute content for our new customers to help them get the best out of our product. As the function grew, I hired a team of product people. They're writers, video editors and educators. We called the team Product Education. Simply put, we market our product to our current customers. We measure our impact by changes in behavior with our product. Did we activate new signups, expand their usage, and retain them over time?

You might not think of this as a traditional marketing activity, but ignore it at your peril. There's no point investing in a shiny marble floor for your hotel lobby only to have guests find a broken elevator and no stairs to get to their room.

I'd like to share some of the tactics I used back in those early days of Intercom, back when the Product Education "team" was just me, and back when we were fighting for every single new signup to become active and loyal to our product (note: Nothing has changed there, we still fight that fight each day). None of these tactics require a large established team or huge budgets. They just require a genuine commitment to treating existing customers as well as

you treat prospective ones.

### MINIMUM VIABLE DOCUMENTATION

No matter what product you're taking to market, chances are you'll need some amount of documentation to support it. That is, you'll want a written description of what your product is, how it works, how to get the most from it, and how to get help when things go wrong with it.

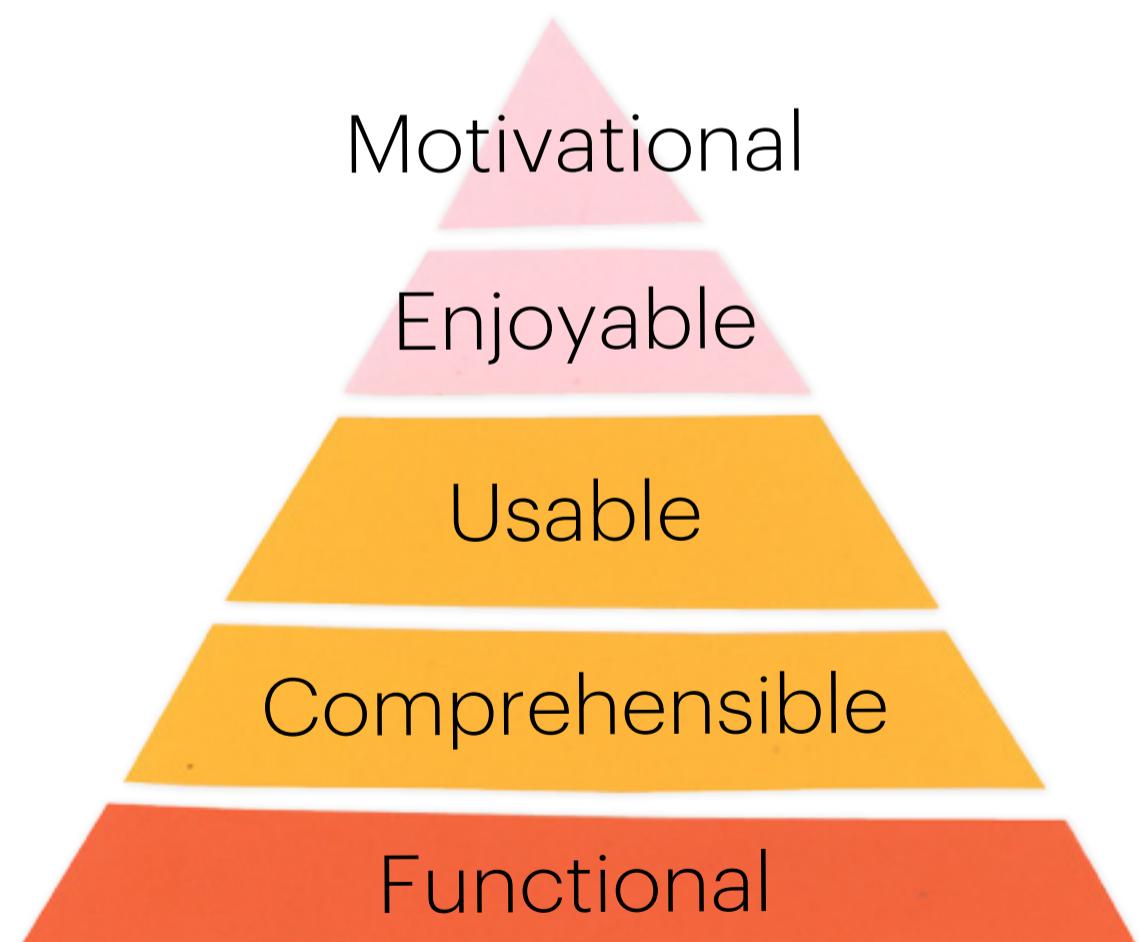
Before you do anything else, write this down. Don't go making polished product videos or inviting hundreds of people to a webinar until you've written your core concepts down. Writing, rewriting and refining these will bring clarity and focus to your ideas, tone, beliefs, and advice. When we're creating other materials like webinars and help videos, we refer back to our docs time and time again to check how we defined things in the first place. It really is our "knowledge base".

### LOOK BEYOND FAQS

When you're working at an early stage startup with dozens of competing priorities, there's a temptation to publish the quickest, easiest types of documen-

tation (usually a series of hastily put together FAQs) just to try keep your head above water. The problem with only having FAQs is that you're only optimizing for when things go wrong with your product.

Sure, you should answer common questions and be honest and upfront about your product's shortcomings. But FAQs alone aren't going to inspire any new usage with your product. Your most effective content, the content that turns trialing customers into paying ones, and paying customers into long-term and loyal ones, should be not only usable and comprehensible, but enjoyable and motivational too.



## GIVE CUSTOMERS THE WHITE GLOVE TREATMENT WITH LIVE DEMOS

Back when I started at Intercom, we made a point of inviting every single person who gave us their email address to a weekly live product demo (usually attended by anywhere from one to 50 potential new customers). Even if that meant getting up at 6 a.m. in Dublin to demo to three people in the Southern Hemisphere, we never missed a Wednesday demo. The benefits were clear – customers who attended were less likely to churn later.

“A demo allows the customer to **see** and **feel** how things will be better if they buy (and **worse** if they don’t).”

– Geoffrey James

In the early days, when your signups are in the hundreds or low thousands, it’s worth showing each and every new customer, with a live demo, how your

product can improve their lives. Unlike other mediums, live demos are extremely personal, and let prospective customers talk to the people behind the product in real time and learn exactly why they should stick around.

This might like seem like a highly unscalable activity but you can automate lots of it. Just set up a recurring automatic message to all your new signups (using a tool like Intercom, naturally) with a link to your registration page. Be sure to have two or three sessions scheduled at any given time using tools like GoToWebinar, Zoom or On24. These tools are purpose built for hosting regular webinars. Now all you have to do is put together a script that demonstrates the value your product brings, not just the features and functionalities. The worst thing you can do is list off feature after feature, and make your customers sit through a long parade of things they don't care about.

### **ONBOARDING SCREENCASTS**

It's frustrating just how many early stage companies simply don't show their product off to prospective or new customers in their marketing materials. Maybe they feel like they don't have much to show yet. Or

maybe they think a two-minute animated cartoon will somehow do a better job at telling visitors what it is they're actually buying. Regardless, if you don't set the correct expectations for your customers about what you're offering, and how to get started, there's every chance they will be left scratching their heads about what it is you do.

Onboarding screencasts are the perfect way to show off your product, and set your new users up for success. The benefits will be clear as soon as you start – you'll see a reduction in customer queries, new customers will better understand your product and your product launches will pack a bigger punch.

Creating screencasts (a video recording of on-screen actions accompanied by a narration) is often labeled as too hard or too time-consuming. It's not. It's something you can do. Don't fear "video". Trust me, if you're working at a startup, screencasting will be far from the most complicated or time-consuming thing that you'll do! Hop right in and start playing with tools like Screenflow or Camtasia. You'll get quicker the more you do it, and your next one will always be better than the last. You'll surprise yourself at how fast you can achieve results.

## ACTIVATION WEBINARS

Some customers will sign up and stick around for a little while, but take little or no action. These folks are going to need extra encouragement to get up and running. For your product to survive, you need to activate them, and get them to take the actions most likely to help them see value in what they've bought.

For example, for a **dating app** the activation steps might be to:

- Answer all profile questions.
- Upload their photo.

For a **project management** app it might be to:

- Create a project.
- Share it with their team.

Once you're confident you know what actions people need to take to get value from your product, invite the customers who haven't taken these steps to a webinar. Your goal is to show them why to do it, and then how to do it. Just like with live demo invitations, you can automate lots of the process by combining a couple of tools. All you need to do is simply show up each week and spend an hour activating your inac-

tive customers.

## ARE YOU SEXY AFTER THE SALE?

How we treat customers  
(before and after they buy our product)



Remember, your new signups are more important than any would-be customer. They're the people who believed your promises, took a risk on your product, and gave you their money. Now is not the time to give them half baked learning materials like poorly crafted documentation or, worse, nothing at all. All of your content is marketing – both before and after the sale – and everything you create should be crafted with the intention of selling, educating, helping and retaining. As Kathy Sierra put it, ask yourself: “Are you sexy after the sale?”

