



shift to tomorrow

WITH HOST DIRK BEVERIDGE



How Your Customers Can Lead You To The Future

WITH GUEST

CAROLINE WRIGHT BERITH

SR. DIRECTOR, FIELD MARKETING AND DEMAND GENERATION, INFOR

Dirk: Say thanks so much for being here. I'm so excited. You know what, you and I had talked a number of weeks ago, and so we've been looking forward to today. I know, so let me stop sharing the screen and let me introduce everybody to you and then we'll get into our conversation... Okay, Caroline. So guys, I wanna introduce you to Caroline. Right. And Caroline, do you go by Carolyn, right?

Caroline: I guess I'm now Caroline Barrett, and I'm in the middle of the name changing process to...

Dirk: Alright, thank you. Alright, well, when you change it completely on LinkedIn, I'll change it. Fair enough. Alright, so Caroline, Caroline is a Senior Director of Field Marketing demand generator for it in for an amazing organization that I had gotten to know. Over the last two years, I gotta tell you something, and I emailed Caroline. I'm gonna be with some of your marketers, I think on Tuesday, and so I had a pre-call with them, lastly, and I gotta tell you something, I emailed you, I said, Is everybody at in four as nice as you... And the other side had been working with... And I just absolutely loved working with everybody and I fortunes great.

Caroline: Thank you so grateful for... And I love everything you're doing with these community events and so happy we could be a part of it, so thanks for having me on today.

Dirk: You're superior. So real quick, so those to me that I don't know if they are a global leader in Business club software products, that's really specialized by industry, which is super cool, a wholesale distribution as an example of that, and they're trust by over 600 680 companies will bite you know Carolyn, I'm trying to develop a recurring business model, thing like that, so I got a lot to learn from him, but anyway, Caroline, you guys, her passion, Caroline helps companies take advantage of emerging technology capabilities and transform into modern digital businesses, and holly cow is that timely today or what I can... I absolutely love you're thinking... You talk about there's a new buzz word that's born every single day, but they all translate into what's new and what's next, and I think that ties into what we're talking about shifted tomorrow, so... Yeah, absolutely. Cool, alright, so let's start with my premise for this week, okay. **My premise, as you saw was our customer is learning how to do business in different ways during this pandemic, we must use this moment to re-imagine and re-invent the customer experience.** So I'm gonna ask you, do you agree with that? And everybody online, I just wanna remind you throughout the day, you have questions, put them in there, I'm gonna try to monitor it and I can ask of Caroline as we go and everybody else, so Carol, what do you think about that premise that I put out...

Caroline: Oh absolutely, I couldn't agree more. And it's... For me, it's even more than that, coming from the market point of view, **your customers, they're trying to figure out how to do everything differently right now, so I would... No matter what you're delivering on, our responsibility really becomes, How can I make their lives easier every day during... During any time, but especially right now.** Yeah.

Dirk: Because everything... If we think our world was being disrupted, theres equally so... Right, and

being as close to that disruption, I guess, right, that the changes that they're experiencing, the fear maybe that they're experiencing the better... Is that fair?

Caroline: Yep, absolutely. Absolutely cool. And their people, no matter what, most of us, of course, are in the B2B market, but at the end of the day, your customers are people and they're all going through a lot, so in addition to just the massive transformation and disrupting their business of going through on the day-to-day, they are going through disruption of their own that we have to keep in mind at every interaction that...

Dirk: So as a marketer, right? And if you go to us with your marketing expertise, how can marketing health distributors during all this disruption that you're talking about, such as this global pandemic, what roles should marketing be playing right now?

Caroline: Well, it really depends, not so much what marketing can do, but what can your business do for your customer marketing... Everyone in your organization should see themselves as marketing, 'cause marketing especially right now, is about every experience that other customers have with you, your marketing department in your organization, they're gonna help you amplify that, so whatever your true authentic message is on how you can help your customers right now, you're marketing or needs to be what helps to communicate that to your customers, and it has to be in different ways than we did even a couple of weeks ago.

Dirk: Interesting. So what's different than a couple of weeks or how we communicate the message that we communicate... How we reach out to them, I'm gonna guess all the above, but

Caroline: I love all of it. It's obvious, but it's also not... It sounds obvious as we're sitting here and we're talking theoretical, but the channels that your customers want to hear from you is different than a couple of weeks ago, every interaction you're having with your customers is different and the message changes than it did even a few weeks ago, and it's even as basic as taking a look at what you were at, we can call the marketing programs, but what is your message to the market and making sure that is receptive for the current time, something is basic is looking at your website and seeing if it's a bunch of pictures of people hugging and interacting, maybe that's not a outdated...

Dirk: I just see the... Sorry, on grass. Did you see the online? I mean, somebody went to celebrate to mother's birthday social, developed plastic sheet arms so they could hug each other with plastic on the tree, them... We did four point. Right. Yeah, so how can be going through a process right now, Caroline, to really get close to that customer, to really understand for this market, for that segment that we're going after, for the individuals we're taking, to really understand what's in their mind that... We talk about the voice of the customer, but I think it's probably even more than the voice that customer, it's deeper than that. And

Caroline: There's a couple of things. There are traditional... You gotta rethink who your customers are and look at what their challenges are today, as we're saying it really are different than what they were even a few weeks ago, so I... That's part of your adjusting the message, Look at your website, look at

your emails, look at your scripts of your customer service representatives, are you doing a good job communicating the culture that you want to be putting out there and how you truly feel about wanting to help your customers, making sure that message is front and center, and then it's really about removing friction, removing any friction or any possible friction within your buying cycles, so just being helpful in that way of delivering what you want to deliver in a more seamless way, and sometimes that's the hardest thing for us to see, especially when we're not marketing propels, we're not sales professionals, you've got all these different silos of your business, and you just kind of assume that all of them are working well together, and one of my favorite things that my husband and I do... 'cause we fortunately work from home before the pandemic, so this has been an ongoing thing, but now even more so, maybe others have more of an advantage, but we love to test each other's marketing out on one other, so I will say...

'cause I'm Infor... And I think, of course, someone knows what I'm trying to communicate here, but I have him read my emails, I have him look at our website and our landing pages and try to understand where you're getting stuck because sometimes when you're in a day-to-day, it's hard for us to see, we're blind to those friction points, so asking others, asking peers to check out new email campaigns, you have landing pages, even call in, try to talk to someone in customer service. Ask your partner or do it, if you've got your wife and over your that, and see if there's some stopping points you can help try to smooth out...

Dirk: You know, that's really great, that's really a great thought, because... Now that you say it sounds obvious, but how often do we do that, how often do we intentionally develop a network to be able to do that and we all know we all get... Right now, I'm looking out at the prison on the ocean, but sometimes you're in the forest of the trees and you can't see through that for us to see if your message in this case is correct. So let's go in, I'm sorry. Well.

Caroline: Just even if you're not a big organization either, any of us on the line, I'm sure I could just be three or four people. One of the things that is also helpful to keep in mind is what are your customers actually looking for and make sure that's the terminology that you're using, and not everyone has a website even, but if you do something as simple as typing in your products in Keyword Planner on Google's Keyword Planner and seeing the common phrases that come up along with your products to make sure that you're using that right message that people are searching for, and again, sounds basic info. We just did the sealer day ERP software, not nearly as high searched as ERP system, so it's about changing even the words you're using to be more readily available and make sure that it's clear what you're putting out in the market and what you offer.

Dirk: Yeah, the typical... You know, I just literally, I wanna have to read an article from McKinsey about optimizing revenue at this time, and the amount of time they spent on what you just say to do that, analytics in terms of keywords, like is critical. So thank you. So let's go to another buzzword that is out there since you love buzz words, so, that's customer-centricity. Oh my gosh, I said on here, Caroline, a while ago that we're celebrating her... In September, we're gonna celebrate our 50th anniversary as a second generation, and my father, I think he was ahead of the curve back then, when he talked about customer focus because were sentries... What... We're still talking about it 'cause I attest

God. For consultants, by the way. Okay, don't tell her about that, but... So what does customer-centricity is you, and then maybe why I fixed it

Caroline: Was you, and the hyphal customer-centricity is two major components to it, one is really what are you delivering and making sure that when you are talking to your customers... You're not talking about yourself, you're talking about them and what their needs are, and again, sounds so basic, but the majority of businesses are not doing that, especially in their marketing organizations, we're really pushing out, here's what I wanna sell, here's what I want, here's what I want, to move and here's what I need to go and make money, 'cause that's what we're in the business of... Of course, as opposed to looking for who needs my products, who needs my services, and being that for them and communicating not what you deliver, but what they get out of it, so it's a lot about how you're having those conversations... I mean, picture, you're a dinner party, back Windows existed on how annoying was the guy in the room, they just talked about himself the whole time, as opposed to the guy brings you in and ask you about yourself, that's customer-centricity in its basic form, is asking about your customers, not telling them about yourself, that's what it is from our marketing arm, and then when you do get a chance to talk, the bigger component is authenticity, and that's what we see so many businesses actually challenged with today more than ever, how can you be authentic in that message, when it is you're trying to talk, how can you authentically deliver? Here's the value that I can provide to you, and that's what's the biggest challenge in writing anything down on marketing communications, any conversation you have with the customer, that's where business is still a challenge.

Dirk: So... If that's the biggest challenge. Can we drill down on that a little bit? So authenticity. Alright, authenticity. So help me understand that a little bit again, 30000-foot view. Yeah, makes so much sense. But what does it mean? Authenticity, if I'm electrical distributor and plumbing distributor, building materials distributor. Does it mean that I'll stop it? I decide that a little bit

Caroline: What it means, a big granular level, is that every part of your organization, every employee understands the value that you're providing is a business, and that's where I think there's such a challenge is you can trade, you haven't made your factor norm and you've got... Part of your warehouse operations, you got the guy down to actually make you faster goods, what is actually gonna be delivered in terms of value on the other end when that gets to your customers, probably not, if we're a honest. Right, right. And

Dirk: That lies the challenge is understanding what is the value that you're trying to deliver? You bring up something. I remember, I got on my computer here, you know when Steve Jobs came back to Apple, when he came up with the Think Different campaign, I can see them in his shorts in front of the leadership team of Apple talking about, you spend all this money on advertising, and nobody knows who we are because we've got to stop talking his words, I can see him say, We gotta stop talking about speeds and feeds, and we've gotta talk about our customers, and I think that's what you're saying, we just... We gotta find is a plan is a desire. Is an art as a science? What is that ability... What's the magic sauce, that ability to be able to talk to the customer at that level that really pulls them... It... Yeah, I mean.

Caroline: Honestly, I think the biggest challenge that everyone has is that it is a combination, again, but we have to re-learn how we sell, because really everyone came up in more of the, alright, I've got a product. There has to be a market for it. So if I just go talk about how great my product is, some of them want it, as opposed to thinking about what value can I deliver to the market and where do I really play in the needs of my customers and... It's more than an art. It's relearning and how your business functions and really centering everything around What do I deliver as a company.

Dirk: So let me go in a couple of different ways, do you mind... And I'm aware that often, that authenticity, I really love that tonight, I think it's something... Maybe I'm just looking in the mirror, but I think it's something that we all need to think deeper and harder about, and you know, if I'm honest with my mentor, my father, one of the things he told us from his day is never over exposure shop never over expose yourself to your employees or your customers, and he always told the story, why do you think the Army has officer test it so that you don't over-expose yourself. Right, and maybe that worked back then, but I don't think it lies today, Caroline, honestly, 10 years ago, maybe 20, even as I was here in Islamorada, you would not have seen me dress like this, that would have been in the Blue IBM suit that tie... The white shirt and all that, but it's not who I am. Don't tell me about it. Right. And so, yeah, I don't know where I'm going with this, so I think you kinda...

Caroline: No, you're hitting on a relation point from a leadership or pivot, and it is... And the book is escaping me, and I apologize, I'll have to send it to you so you can send a round of example, but they have an incredible book on authenticity from a leadership perspective that touches on exactly that and when you're being sincere about looking at customer marketing and really how you get around with customers, you have to be vulnerable, and that something that leaders struggle with today is that willingness to be vulnerable and to really test out the way you do things and challenge the way you do things, and you're... Right. Much of the leadership of yesterday was, Okay, I gotta be the smartest guy in the room. I can say I sincerely don't think I've ever been this smartest guy in the room since I got to him for... And yet, here we are, and you have to have that willingness to try out new things and to listen to new ideas, and that includes your customers, you have to be willing to listen to them and get feedback from them and take that and apply it to your business model. And that's a new way of leading.

Dirk: Beautiful, I love it, Caroline. So those of you that are, if you were with us last Sunday, if you weren't with us, when Rick Fantham, the CEO of Hajoca, was on one of the questions he got at the very end, Caroline, was how do you align people in this time... And I bought a board and he thought about it, and in that authentic vulnerable moment, written an amazing CEO, after about 30 seconds of thinking it through on video, he said, You know, I've gotta stop being the smartest guy in the room. I have to reach out and pull in from everybody else, so if you weren't there for that, calling that for Carolina, same de, make sure you go to the replay page and watch with anthems. You talked about testing. Caroline is part of this. Right. And so can you share with us... You know, if I want to be sure that my message is not only resonating now, but as I'm starting to identify how the customer is changing, how the customers need wants desires, the outcomes they're looking for are changing, how do I as an organization or as a marketing sales team, how do I get out there and start testing my marketing and sales message to ensure that, it's resonating and it's speaking to the customer about the customer, I mean

Caroline: Testing it will ultimately be talking to your customers and getting feedback from them, but before you do that, you have to have something to show them. So the best way, it's a traditional model, but marketers build personas, and it's something that you can't build once at the beginning of when you're rolling out a new product or service and think, This is my personal and opportunity because we're ultimately people... You're selling to people, no matter whether you're B2B or B2C, and people have different needs, they grow and change, so it's about writing a message, and it starts as simple as a statement to look at, Okay, here is my product that I want to deliver, Here's my service I wanna deliver, now what does my customer actually need and try practicing instead of focusing any statements on your product benefits, focusing on the benefits they'll come to the customer and just encourage every employee to practice, Hey, what is a statement? Not of what this delivers, but what the value that you actually get out of it, what are the benefits statements, and then take those to your customers, take them to your top customers, we had import, we have to meet councils, literally Industry councils of our customers, and they are 100% for us to get feedback from them on our message and positioning the market and on the products that we deliver, you need that you ultimately... You cannot guess you need that direct customer feedback. I

Dirk: Love it. Thanks. So let's go to the start of what you said, you talked about personas, for those of us that may know of it, but aren't really applying those that tell me what the persona is and maybe even... Can you share with... So we can cancel, see it, maybe even share with us a persona that Infor has of a customer that I can get my arms to that...

Caroline: Yeah, of course, person. A basic level is, Who is your ideal customer? So who is the most common customer for us in the B2B world, we typically look at customers by industry and buy their role within an organization, 'cause that's how you can really drill down to their specific needs, so an example, We have personas for ERP software around it, as well as finance, and depending on who you're talking to, you're gonna have really different benefits because that's what you should be leading with his benefits, that you should be speaking to our... Just to go and say, Hey, we got... Here's a software and talk about all these cool software, unique benefits that do talk about me, that's not talking about them. But if I look at okay with it, it's about innovation and speeding innovation cycles, and it's about connectivity with its finance, it's actually gonna be about reducing overhead costs, and it's gonna be about connection of systems in an integrated way in friction list, invoices, it really... It changes the benefits you even talk about, and therefore your entire efforts based on what they need as individual people, 'cause we all are individual people and have different East...

Dirk: I love it. So Paul, CEO of Ceratec, a flooring distributor up into Canada, he says, they define their persona as the main spirit expert. Is that right fall? Yeah, right, so there you go, right? O. Yeah. Cool, alright, so personas, is it difficult to put a persona together and how would you portion it together.

Caroline: There's all sorts of templates and stuff online, but ultimately all that person is is trying to give you a model for creating a customer-centric message. So really, at its basic form, building up a persona is creating those value statements, what are the challenges that my customers are facing, and

what are the benefits that I can help them to realize, and having that be the message you lead with in every interaction, not just... Marketing on your website or emails, but that needs to be how you treat people at the customer service level, your sales team needs to take that same as your executives need to adopt that message, and it should be universal, these are the benefits that we deliver, and here's the challenges or customer you're facing, and this is all we should be talking about, we shouldn't talk about anything else except for that, Caroline.

Dirk: I love it. Now, when I talk about value propositions in front of groups, one of the statements I often say is that we're stuck in the world of sameness, everybody's a... Start shaking, yes. And then I say, You know what, your employees would be challenged to be able to communicate to the customers why they should buy from you, there's a bunch of alternatives that can buy the same building materials somewhere else, right. But they'd be a challenge to communicate why they buy from you and not what you just help me understand is maybe it's because we haven't gone through the discipline of what you've just said, developing these personas, wells.

Caroline: And it's also disruption to be honest, the value that you deliver versus your competitors. It's Kenmore near out by the day. I love admitted to transmit to the route, this incredible article I can share later, but talking about the fact that the Amazon effect has really changed the expectation of your customers, so you can't really compete on delivery anymore in time to value, because the time to value expectation is immediate. So they are one form of competitive differentiation that we all have, and you don't really wanna focus on competing on price, because then you're really all just driving each other's margins down as an industry, so you have to think of other ways that you can deliver value to your customers, that's why you see so many distribution and manufacturing co-companies adding services, the value-added services component of What can I help to deliver most of the time at no cost to many customers to help differentiate what I'm offering compared to many competitors, you back...

Dirk: So what are some of the ways that you're seen distributors becoming more customer-centric and delivering those types of outcomes that the customers are really after?

Caroline: Yeah, it really depends on the business model. You see a lot of distributors adding services like repairs, but it could be as basically, if you're not a massive enterprise or musician who can't build out these new arms of operations, it could be as basic as looking at some... How you engage with your customers, so what's your customer service department like and how can you maybe reduce the points of friction there, maybe adding some more functionality to your website to allow your customers to get in contact with you a little bit easier. It's about removing friction and adding value in any place you can to the best of your ability.

Dirk: Cool, I love it. Thanks. So I have a question that I wanna bring to you, it's technology based in that marketing customers interests, but so before I go to that question, we only got about three or three minutes or so... What did I not ask you, Caroline, that you were just so damn passionate about your marketing and customer obsession, 'cause I know you... I know you are just absolutely passionate about this topic, customer obsession.

Caroline: For me, and I was thinking about this earlier as a marketer, as a marketer of a manufacturing company, what I think has been the biggest thing I've learned during the most recent disruption, we're all going through of this global pandemic is you don't... It's not about being the loudest, it's about saying the right thing, and sometimes it's a challenge for us to figure out what is the value that I'm delivering right now, but don't go to market with any message if you're not sure it's the right one, and we've seen a couple sales, it was a couple, couple of safes of companies that are trying to go to market right now around the pandemic and offer a message of authenticity, but it's not coming off that way because they're not delivering, not value or they don't have the right message of value. So I would just caution, and something we've learned is you really have to wait sometimes to deliver the right message as opposed to just trying to be reactive and push something out, which we see so many do right now.

Dirk: Interesting. Now, let me get into clarity on something, because we talked about the importance of experimenting and testing, and I assume that is even testing messages, and now here you said, right, don't go to the market with the wrong vesalius.

Caroline: What you can never be afraid of. If you're saying something with that true, often it... There shouldn't be any fear of bringing a message to market, but love your not going to market with authenticity, if you're just going off of speed reaction, then yes, you have to be very reserved and you're doing... But for customers, creating a unique community of customers and bouncing those ideas off of customers, friends, your wife and the other room, those can all help you before you push something too far.

Dirk: Yeah, you bet. Caroline, thank. As you're talking, I think about the times, and I'm gonna ask, 'cause I tell the story, you're gonna ask the people that are listening to us if they can relate to this, I know that there are times because of the reactionary nature. And then you said something else I could get. But then also there's the economic pressure of business, right, that sometimes... And you kinda go out there, make some happen, and I know that probably my legs, it sucks when I've been in that position and I... Deep down to my gut, I know what I'm doing is not right, because it's not being authentic, it's internally motivated rather than customer motivated, and... So real quick, I never gonna go here, but how often does the gut lead your decision as well... Is that a fair question?

Caroline: It is a fair question, and as marketers, we're creative, so we do allow or gut to influence things for sure, but if your gut reaction is just speed, and especially as a business owner that you're trying to keep the lights on, I mean, yeah. You want the authentic, but at the end the day, you have to sell something, the best way to do that is by removing that friction, so even if what you're bringing to market isn't the highest value right now, here you're not making 95, you're delivering... Not even Trollope, you're down the paper towel level, but if you are delivering that in a way that's easy for your customers, then that is authentic, whether it's their number one priority or their sin, if you're helping them get what you deliver faster, more effectively and in a smoother process, then you are gonna be that priority and you are going to still succeed as a business. I

Dirk: Love it for Caroline, everything you just shared with us over the last 30 minutes, we'd go on for a lot longer, was provided as a lot of great insights and wisdom to be able to get out there in that

customer-centric manner to really understand it and I think it's more important than her because the customer is changing and we've gotta be listening, we've gotta be understanding who they are, and at the same time hunting who we are and bring that authenticity together. So, Caroline, this has been absolutely amazing. Thank you so very much. And you have a great rest of your Sunday. Okay.

Caroline: Thank you. I'll leave the Web Camp, I'm gonna keep listening and I'm loving this and thanks so much for the time. Tactical, right.

Dirk: Thank you so much, have a great day. Okay, we'll see it. Thanks. Alright. Hey, is that awesome? I gotta tell you, I absolutely love carolines. Optimism or a view of the world. Her wicked smart-ness in terms of value propositions and customer orientation, and I can still remember when we were talking on a project we're working on, when I invited her to do this about three weeks ago, and she just lit up, October, talking about the customer and all that and Caroline, you knocked it out of the park for it, so... Thank you, thank you, thank you. Thank you very much. Okay, so guys, let's continue on here and... Yeah, Jim, thank you. I agree. Five stars. I hate Caroline. Caroline is awesome. It here, five stars, Caroline is great. I love the message around customer-centricity to airline you did back out of fire. Thanks for sharing that. Everybody.