



## Message from O&A President

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I interact regularly with CIOs across the country who are getting more comfortable with the "M" word – "Marketing." That's a given today when you're in the boardroom working elbow to elbow with other C-level executives. However, the real challenge CIOs face now is getting the rest of their IT leadership team and staff rolling the "M" word off their tongues and building marketing into their day-to-day work.

Since the 1980s, Ouellette & Associates has been helping IT organizations market internally, or as we define it, "create an awareness of IT's value." This special issue of our client newsletter is dedicated to this topic. Included are insights and best practices from three progressive O&A clients. These savvy leaders are ahead of the curve - and they are developing a marketing philosophy and skill set throughout their organization. Each has also laid the foundation for successful marketing by building a client focused and results oriented culture.

Also in this issue, O&A senior consultants Anita Leto and Lisha Wentworth discuss the trends they are seeing with IT marketing. These insights are based on their more than 25 years of experience helping O&A clients develop and execute their marketing plans and strategies.

We invite you to forward this to your IT leadership team and staff so that everyone in your organization is involved in the marketing equation. We also encourage you to make marketing a priority in 2003...get everyone comfortable with the "M" word and you'll be well on your way to positioning your organization as the competitive, IT provider of choice.

Daniel D. Roberts

*Bruce Brower, Bill McQuiston, and Destiny Moneysmith are with KC-based Truman Medical Centers. TMC is a leading diversified healthcare provider that is among the five percent of US healthcare organizations that are in the black. They have recently been awarded new contracts, are expanding and improving their facilities, gaining market share, and attracting new, extremely talented people. You can direct questions to [bruce.brower@tmcmed.org](mailto:bruce.brower@tmcmed.org)*

## Ten Tips for a Healthy IT Marketing Strategy

*Truman Medical Centers' Prescription for Transforming from Provider to Partner*

There was nothing wrong with the Information Services organization at Truman Medical Centers in Kansas City, Missouri. Vital signs were stable. Everything appeared to be normal. Then a “check-up” revealed an opportunity for improvement.

“After attending the O&A marketing workshop, the IS team realized that we could use the tools to shift from order taker to solution provider,” says Bruce Brower, manager of the project management office.

With the encouragement of CIO Bill McQuiston, the IS team launched a full-scale marketing campaign – and early reaction from the hospital leadership team and colleagues has been positive. In fact, one department within the medical center, Human Resources, turned to the IS professionals for advice on how to market new initiatives and changes to the employee population.

“Not only has the IS department benefited from our own marketing efforts, but we are able to use the experience we’ve gained to help others,” says Destiny Moneysmith, senior applications analyst and chairman of the IS Marketing Committee.

Following are ten tips for successful internal marketing being applied by Truman’s IS team. Which of them are right for your organization?

1. Form an IS marketing committee. When Truman’s leaders returned to the office from attending an O&A workshop on marketing, they wanted to keep the momentum going. With the support of the CIO, they formed a committee and invited him to join – but not lead – it. The committee meets regularly for brainstorming, planning and oversight of marketing efforts.
2. Create an identity for the IS organization. As part of its marketing plan, IS developed a logo and tagline that showed its unique role in Truman’s



overall strategic direction: *“Information Services - Supporting a New Tradition.”* The logo and

tagline go on every communication that leaves the department and complements Truman’s “corporate” slogan of *“building a new tradition”*.

3. **ACT** out the behaviors you want to reinforce. IS leaders wanted to find a way to remind staffers about their new marketing and service orientation. The IS team created the acronym A.C.T., which stands for “Acknowledge” (or listen to customers); “Communicate” with empathy; and “Take” ownership/take action to help the customer. A few IS staff put together a skit that demonstrated in a humorous way how not to act with customers and then how to apply the A.C.T. principles successfully.

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## Ten Tips for a Healthy IT Marketing Strategy, continued from page 2

### Bonus Tip:

Provide IS-specific marketing education and awareness training. Knowing that most IS professionals generally don't have a lot of back-ground in marketing; CIO McQuiston put his entire organization through a Marketing Awareness workshop. This helped everyone understand the basic concepts of marketing and how those concepts could play a role in creating an awareness of Information Service's value throughout the medical center.

"Even though we've let everyone know who we are, what we do and how to reach us, we continue to reinforce these basic ideas in many ways. It never ends. We are building a customer base that knows us and trusts us. We can launch new products and provide new services more quickly when we have solid customer support. That is good for the medical center and good for our patients," says Brower.

4. Give people free stuff. The IS marketing committee made a modest investment in giveaways to keep IS in the customers' minds on a daily basis. A stress reliever shaped like a computer mouse with the IS logo and contact information printed on it, mugs, pens and notepads reinforce the idea that it is easy to reach IS and get help.
  5. Invite people in for a visit. Truman called their IS open house an "Extravaganza." They used the event to promote their services and a single new way of contacting IS through the intranet. Of course, their message emphasized WIIFM, "What's in it for me?," the benefits to their customers.
  6. Use humor whenever appropriate. At the Extravaganza, the team offered cookies and other goodies wrapped up with recipe cards for colleagues who might want to make those treats at home. On the opposite side of the recipe cards, the IS team had printed fake recipes for "Web cookies, Technology chips, Project Management bars and Business Function brownies" using IS jargon, poking fun at themselves and the mystique of technology.
  7. Use existing communications channels. The IS Marketing Committee used every available (and free) resource for announcing its Extravaganza and distributing information about IS services. Several articles were published in the Truman newsletter and on the intranet.
  8. Reach out to leaders. To give the medical centers' leaders a preview of its marketing outreach, the IS team hand delivered candy tins emblazoned with the department's new logo. The impromptu visits gave the IS professionals a chance to touch base with key customers and continue to build relationships.
  9. Print a brochure. Despite the pervasiveness of technology, there's still nothing as handy and portable as a printed brochure for customers to tuck in a file, pin to the bulletin board or slide into a pocket. Truman's team printed inexpensive "slim jims" – six panel brochures to highlight key services and reinforce contact information. They use a consistent look and design for all customer communications. To avoid a glitzy appearance and to save costs, they design and print the brochure themselves.
  10. Form a SWAT team. Truman has decided to try proactive marketing and customer relationship building. They will form a small, pilot group to meet with customers, hear the problems they are experiencing, analyze the data from help desk tickets, and formulate an action plan for a solution.
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## Sweet Dreams: Simmons Company's CIO Shares Secrets of Success for Marketing the IT Organization to Business Partners

*Is there a CIO anywhere in the world who doesn't dream about having his or her IT department recognized for its good work and value added? Simmons Company CIO Wade Vann talks about making the dream come true and how to embed (pardon the pun) a marketing mindset among IT professionals.*

*If you have any questions, thoughts or feedback that you would like to share with Simmons CIO Wade Vann, he invites you to email him at: [WVANN@simmons.com](mailto:WVANN@simmons.com)*

Earlier this year, Atlanta, Georgia-based Simmons Company, a leading manufacturer of premium branded bedding products, such as the Beautyrest and BackCare mattresses and others, held its annual leadership meeting. Some 450 executives, plant management teams, and corporate support departments attended the event. They were requested to bring their laptop computers with them to the meeting.

Never ones to be caught napping, members of Simmons' IT organization collected the laptops, performed routine maintenance on them, added upgrades and enhancements and quickly returned the computers to their owners.

"My team worked all day and late into the night during this week to provide these special services - I was really proud of them," says Vann.

Also during the leadership meeting, the IT professionals provided the systems support and conducted one on one training as needed for the leaders.

Throughout the week long meeting, members of the IT staff were congratulated for the work the IT department had done. It was clear our customers see us as someone they can come to with their IT issues. They were most appreciative of how we handled the technical challenges and how customer focused we have become.

During several of the formal presentations the IT team was recognized as their true business partner. One plant manager found Vann and gave him a bear hug,

saying, "Your team is the most phenomenal team I've ever worked with in my career. They go above and beyond every time!"

The recognition didn't stop there. At the next staff meeting back at headquarters, Vann told the story to the entire IT department. Then he emphasized the success with a surprise. The company was treating everyone on the leadership meeting support team to the Atlanta Braves' opening day game at Turner Field.

### IT Ambassadors

It's the rare IT organization that elicits applause, hugs and cool rewards. Vann reveals the secret of his organization's success: "If we are going to be the IT provider of choice, our best marketing is providing results, partnering with our customers and delivering great service."

Wade credits the company's dynamic new leadership team for creating an organization where the value of IT is broadly understood and recognized. He notes that Chairman and Chief Executive Officer Charlie Eitel and Executive Vice President and Chief Financial Officer William S. Creekmuir model the company's culture of teamwork, encouragement and results as do the entire executive leadership team. Vann joined Simmons three years ago for the opportunity to work with Eitel and Creekmuir – and to build a service-oriented, marketing-savvy IT team.

"All of us in IT are ambassadors for the IT department," says Vann. "We are marketing ourselves all the time – even when we are not doing it intentionally."

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We encourage you to take a look at *CIO Magazine's* recently published State of the CIO/Six Best Practices (April 1, 2003) findings and see why Simmons' CIO is enjoying so much success (and sweet dreams). You'll find several parallels between these Best Practices and Simmons' case study that you may want to incorporate into your organization. Included is being on the executive team, engaging senior business leaders on IT projects, including users in the same projects, employing a high-level group to make IT decisions, communicating regularly with clients at large, and the use of IT Ambassadors.

## Sweet Dreams, continued from page 4

### Proven IT Marketing Techniques

But IT does not rely on these methods alone. They also use a variety of marketing techniques to create widespread awareness of IT's value to Simmons and strengthen existing relationships with business partners. For example:

- **Pre-emptive meals:** Vann recommends taking customers to breakfast or lunch. "People have to eat – invite them to join you and use that time to get to know them. Do this before you get into the heat of the battle of a big system rollout. Establishing the relationship beforehand will buy good will and help you through the difficult times."
- **IT Spirit Week:** In the spring, Vann and his people will host this week-long event in their headquarters office. Along with demos and tutorials, they'll provide a simple lunch to all Simmons employees who stop by to learn more about IT and its services. The week will culminate with an ice cream social and a drawing for a few flat screen monitors. "We want people to be curious enough to come for a visit and find out what we are doing in IT," Vann says.
- **Plant Visits:** One of the risks of a centralized IT department is isolation from customers in the field. Vann encourages his team to schedule regular visits to their 18 plants, located throughout the United States, to make sure that all systems are functioning smoothly and to ward off potential problems. Most important, the traveling IT ambassadors spend time talking to customers to ferret out any issues – even if they haven't called the help desk to fix them.

### The Marketing Mindset

Vann's marketing mindset came from one of those "ah-ha" moments of truth that inspire creative leadership.

"I've been in IT for 30 years. The first 15 years, I was a very traditional IT guy. Then I accepted a job as director of customer marketing and for the first time in my life, I was an end user. I quickly realized that everything I had done in IT was wrong from a customer point of view. I called the new IT leader and suggested some changes to make things better for end users. He just laughed and told me I had set up the processes and he wasn't going to change them because, from an IT point of view, they worked fine."

"Four years later, I returned to the IT industry with an entirely different perspective – completely customer focused. Just to play in the game an IT organization must be strong technically and know the business, but what an IT organization needs in order to exceed their customers expectations comes down to communication and building relationships with customers."

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## Spotlight on Highlights: Two IT Directors Answer Questions about Marketing the IT Organization

*Karen Gray, director of project services and Don Allen, director of applications services have successfully used marketing techniques to revitalize the help desk function and strengthen customer relationships.*

*Highlights for Children* is based in Columbus, Ohio. The familiar and beloved kids' magazine has grown into a company that includes seven distinct businesses. The publication, founded in 1946, has a circulation of approximately 2.5 million – the largest of any periodical in the world for juveniles based on subscription rates.

**Question:** *What is the point of marketing the IT organization internally?*

**Allen:** Internal IT organizations need to be competitive with external vendors, which have very sophisticated marketing plans in place. We need to understand those skills and use them effectively to remain the IT supplier of choice.

**Gray:** Marketing gives us opportunities to identify with our clients so that we can understand their needs and strategic objectives. Marketing also gives us the tools to develop more of a consulting partnership with our clients.

**Allen:** It's all about aligning IT with the business and using marketing as a way of communicating effectively.

**Q:** *How did you jump start your IT marketing efforts?*

**Gray:** We conducted a survey of our help desk customers to find out what they didn't like about the service we were providing – what they were unhappy with. We took the information from the survey and rewrote SLAs, built new policies and procedures around the SLAs, and educated our staff around new values of customer service. Once we had all that in place, we looked at another recommendation that the survey yielded. Our customers wanted to know us better. We decided to hold an open house so they could learn more about our services and how to communicate with us about IT needs and issues.

**Q:** *How did you use the open house to market the IT department?*

**Gray:** We billed the open house as a relaunch of the help desk, founded on improvements made as a result of our learning from our survey. We sent

invitations to directors and managers in the businesses and functions we support, and asked them to bring key staff. At the open house, there were refreshments and IT professionals gave brief PPT presentations on how the help desk would now work.

We also produced a pamphlet that documents our services and how to get in touch with us. A brochure was created that gives our customers tips on how to solve some of the most common IT problems. To give people a way to remember who to call when they experience an IT problem, we gave away trinkets with our name and number on it.

**Q:** *What was the result of the open house?*

**Gray:** We increased our help desk volume intake by 10 percent in the two weeks following the open house. Fortunately, we were prepared for that response and we were able to serve our customers effectively. That reinforced the service orientation we emphasized in our presentations and our attitudes at the open house.

**Q:** *What is the value of investing time and resources on marketing?*

**Allen:** We asked ourselves the same question before we began our IT marketing campaign. Initially, we associated all the negative stereotypes of selling with marketing, but we've since learned that is an incorrect view. For us, the importance of marketing is building strong relationships with our business units. That's what an effective marketing plan drives toward – a relationship that helps both sides and gives IT professionals the ability to assist people in doing their jobs. That's what is important for the corporation.

## A Marketing Formula for IT Success: Gaining Competitive Advantage

By Lisha Wentworth and Anita Leto

### O&A's 13-Step Marketing Plan Template

1. Identify Objective/Goal
2. Measurement
3. Client Profile
4. Positive Forces
5. Negative Forces
6. Primary Concerns
7. Approach
8. Theme
9. Partnering
10. Tactical Action Plan
11. Review
12. Execute
13. Evaluate

A lot has changed in IT since we began offering IT-specific marketing workshops 15 years ago. CIOs have recognized the strategic advantage of marketing the IT organization to the rest of the company. Today's IT leaders are business and marketing savvy, a good thing given that they are facing phenomenal competition from outside providers including outsourcers, consultants, vendors and system integrators.

These competitors are skilled marketers, adept at getting in front of executive-level decision makers (i.e., your clients), and are trained to focus on the business benefits their companies can provide. While internal IT organizations have made strides as marketers, they still talk too much about the features of their systems and services without focusing on how those features benefit clients and the business.

One of the take-aways from O&A's IT Marketing workshop is that we help IT professionals understand the difference between features and benefits. We show them how to package their day-to-day communications, business cases, and marketing plans in terms of business outcomes and the WIIFMs (what's in it for me) from the client's perspective.

Another important learning we stress is that IT leaders must embed a marketing mindset in all their people – and hold them accountable for marketing. The responsibility for marketing can't be delegated to one or two people. Everyone in IT plays a role in marketing the organization – whether they do it intentionally or not. To elicit positive marketing behaviors from the entire IT team, the CIO must tie the marketing mindset to measurements that provide incentive and reward.

The 24x7 marketing mindset shows up in something we at O&A call “hallway marketing.” IT professionals should talk up IT at every opportunity – in the hallways, elevators, parking lot, cafeteria, pre- and post-meetings and even during quasi-social outings. Most IT folks tend to put themselves down and beat up on the IT department in their conversations with clients.

Instead, we believe they should follow the lead of the external IT consultants who are expert marketers and who talk about how great everything is. IT folks need to consistently say positive things about their team and department while demonstrating how they contribute value to the company. This is why we define marketing as “creating an awareness of your value.”

At O&A, we recommend that IT professionals use their inside advantage to market their value in a positive manner. Their ongoing contact and existing relationships with decision-makers is a competitive advantage that far outweighs any marketing savvy exhibited by external consultants.

In working with our clients, we also have found that a marketing philosophy along with a formal marketing plan (see sidebar) must be firmly embedded at all levels of the organization. It isn't enough for the CIO to proclaim that the IT department will roll out its new marketing plan. That plan must be communicated consistently and frequently to all members of the IT staff to ensure that they understand their role in making it successful. This is why many of our clients concurrently implement marketing plans targeted to IT as well as the business.

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The *Wall Street Journal* recently published an article reporting on the power of Hallway Marketing which was followed up by a piece in *ComputerWorld* magazine titled “The Elevator Speech”. Both pieces speak to the need to prepare your IT staff for the tremendous opportunities created by chance encounters with key clients and decision makers in the hallway, on the elevator, or in the cafeteria. So the next time you’re side-by-side with your CEO in the elevator, will you have your thirty second sound-bite prepared highlighting the value that IT brings to the table, or will you need to change your sweat-drenched shirt?

## A Marketing Formula for IT Success, continued from page 7

While marketing can do a lot of great things for an organization, it is not a silver bullet or a miracle cure. To use marketing effectively, the IT organization must be built on a service culture that can deliver on its marketing promises. In some cases, we encourage our clients to postpone their marketing initiatives until their service culture is firmly in place.

So add it all up (for you math majors): a marketing mindset *plus* focusing on benefits *plus* positive hallway marketing *plus* IT’s inside advantage *equals* a successful, well positioned, marketing savvy IT organization whose value is understood enterprise-wide.

Take advantage of your inside track. We wish you success with your marketing efforts.

Senior Consultants Lisha Wentworth and Anita Leto have more than 25 years experience helping O&A clients build a more consultative, client focused, marketing savvy culture. Their energetic style and innovative approach provides both the motivation and the skill set necessary to help IT compete as the provider of choice.

If you have any questions for Lisha or Anita, or would like to discuss these marketing trends, they can be reached at [lwentworth@ouellette-online.com](mailto:lwentworth@ouellette-online.com) or [aletto@ouellette-online.com](mailto:aletto@ouellette-online.com).

## O&A’s Public Workshop Schedule

### *IT as a Service Organization*

May 13 - 14	Phoenix, AZ
June 9 - 10	Portland, OR
Aug 26 - 27	Boston, MA
Oct 14 - 15	Minneapolis, MN
Oct 27 - 28	Sacramento, CA
Nov 4 - 5	Columbus, OH

### *Politics of IT Project Management*

June 26 - 27	Omaha, NE
Sept 16 - 17	St. Louis, MO
Nov 18 - 19	Boston, MA

### *Consulting Skills for the IT Professional*

Nov 18 - 19	Minneapolis, MN
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### *Business Requirements Management*

June 4 - 5	Kansas City, MO
June 10 - 12	Seattle, WA
July 29 - 31	Madison, WI
Aug 12 - 14	Baltimore, MD
Aug 12 - 14	Sacramento, CA
Oct 1 - 3	Boston, MA

### *IT Project Management:*

#### *The Human Side of the Equation*

May 7 - 9	Chicago
Oct 21 - 23	Omaha, NE