HOW TO CREATE CONSISTENT BRAND EXPERIENCES IN INCONSISTENT TIMES

In the era of socially-distanced sales and marketing, smart document organization and automation can drive productivity, compliance and collaboration

With marketing budgets on the line and many marketers racing to transform their portfolios into digital content generators, there's never been a more important time to organize and streamline your message—and your company's documents and assets. From critical contract language that has made dramatic shifts since COVID-19 to sensitivities around global markets, to sales and marketing teams working exclusively from home to persistent compliance issues, consistency has become the new imperative for marketing organizations hoping to survive—and thrive—in the current environment and beyond. In this excerpt from our conversation with Templafy head of demand Chris Lewandowski, he discusses these issues, and reveals some of the ways marketers can nip, tuck, streamline and optimize their business practices and document automation for maximum performance.

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CHIEF MARKETER: *Marketing budgets and teams are under unprecedented pressure to remain productive even in these stressful times. Where are some of the most common inefficiencies lurking in most marketing departments? Where is the most time wasted among marketing groups?*

CHRIS LEWANDOWSKI: Yes, typically in periods of uncertainty or downturns marketing budgets are some of the first to get slashed which leads to a larger discussion of marketers needing to shift the organizational mindset of the department being seen as a revenue center rather than a cost center. With that, marketing budgets do come with weighty expectations—ineffectiveness is easy to identify, are you seeing an expected or positive return on your programs? Identifying inefficiencies requires a deeper dive and further evaluation into your marketing strategy. One key question to ask for identifying inefficiencies is: are current marketing activities driving pipeline and revenue? And one key to getting that right is the lead and pipeline management process and at a greater level marketing and sales alignment. Another big inefficiency and probably the most frequent one surrounds content production. For most, the content creation process can be defined as "anarchy" with there being issues in objectives, approvals, deadlines, communication, access, and activation strategies. Being in the document management space this is something we hear all the time from CMOs, brand, and content leaders. Their content inefficiencies involve a lack of productivity in not having proper or automated workflows, outdated templates, redundancies, content governance along with the proper individuals and teams within the organization not having access to or not leveraging the right content—which then creates separate brand governance and compliance issues.

CM: *Many marketing organizations are scrambling to pivot mountains of content into digital and social media that will reach customers at home. What steps should they be taking to organize and standardize it all?*

CL: I think the biggest need for all those involved is to layout a true content strategy to execute upon. And be agile in the plan for when you will need to pivot and shift. Understanding what content you'll leverage that is going to have the greatest impact and drive value—what content needs to be produced or what existing content can be repurposed, prioritization, timelines, content objectives and channel strategies surrounding the respective content. In today's era of distracted, empowered customers you need to ensure the content your organization puts into the digital universe is digestible and impactful. From a standardization perspective, ensure dynamic templates are being leveraged which creates productivity and

improved quality while putting controls around brand governance and compliance. On the organization side, ensure there is a central repository or governing tool with the proper structures so that content is easily distributed, accessible and readily available to all. With this, employees wont waste time searching for or re-creating content while you ensure the latest content and messaging is being utilized.

CM: *How can global marketing organizations ensure they their messaging and materials are consistent yet still respectful to local cultures and nuances?*

CL: Great question, and something that Templafy solves for with some the largest companies around the globe. Your employees are brand ambassadors, whether they are aware of it or not. There's billions of business documents and content created and shared by employees each year and most of these originate or pass through the marketing department in some form. The issue becomes with so many assets being created and distributed, how does marketing govern and control making certain that the latest and greatest documents, content, presentations, and assets are being leveraged across the organization. Imagine a world where every company issued document, content, presentation, and email had the right logo, up-to-date branding, and correct legal disclaimer—well that's what template management does. Having a centralized solution or platform employees working in multiple offices, remote or under multiple brands will always have the latest compliant, on-brand versions at their fingertips. With automation and role-based access controls each employee has assigned privileges and a personalized experience depending on their country, region, role, and team.

CM: *Many sales teams are relying on digital assets now—how can their sales tools and collateral be streamlined and refreshed for virtual audiences and engagements?*

CL: We're all aware the importance content has within sales enablement and it's unfortunate that the majority of sales enablement programs fail to address streamlined content management. Maybe not what all content marketers want to hear but I strongly believe that Sales should be spending most of their time selling and not heavily involved in creating content or sales documents. It all goes back to having the right tool within your tech stack that solves for your organizational needs and enables productivity. When we talk about streamlining and automating document creation, sales collateral holds a good chunk of that. The right tool should support employees at each stage of the

creation process. First, by gaining easy access to the correct assets directly within the document creation applications and other systems used during the sales process. Secondly, by automating repetitive parts of the creation process to assist salespeople as they build customized sales materials to fit their specific needs. Document templates, images, disclaimers, branded content, product information and ready-made slides should all be readily available exactly when needed. Sales can automate the assembly of more complex sales documents like pitch decks, proposals, and contracts by dynamically putting them together with correct data, branded assets, and employee-related information. The right platform should enable Sales to create fully automated documents and sales material that is customized to their prospects' needs. Salespeople no longer need to manually build and review every aspect of presentations, proposals, contracts, or any other collateral and spend their time providing value to prospects and clients.

CM: *Can you talk about some of the cutting-edge technologies out there that make teams more productive?*

CL: There's quite a bit within document automation and interoperability that essentially automates all creation aspects of complex documents, it connects compliance and productivity. When building complex documents, this software and integrations saves a vast amount of time by automating and streamlining document creation workflows based on certain choices employees make and automatically build documents tailored for a specific purpose. Employees can now quickly and accurately create highly complex documents and trust they are using the most up-to-date content and language. Additionally, the right data can be pulled in from adjacent systems into a document workflow and use automation to fill in what needs to be filled in. It will prevent human error and make employees more productive without the need to spend time finding the data and manually inserting it. Another new tech feature within document management is context-aware intelligence. There is a lot consideration around the application of AI technology, but just as important as AI is context aware capabilities of software to further assist with automating steps in the document creation process and validating document output.

CM: *Essential business documents (i.e. proposals, contracts, reports) have come under the spotlight in the post-COVID economy as marketers have had to renegotiate their partnerships and sponsorships. What are you seeing and how can marketing teams be better prepared to maintain contract language and ensure compliance across their organization?*

CL: It's quite simple but unfortunately document management isn't working well in terms of effectiveness in the digital workplace. Despite the critical importance of document management, few have invested in the right systems and even fewer do not manage them properly. When it comes to marketing teams being better prepared to manage on-brand and complaint language it goes back to having a central governing tool or solution that allows marketing to control and dynamically insert the latest language into company templates, content, and assets. When employees open a given document or template to build or share, the latest language is already within the document. The right tool should have an easily accessible hub where all content can be updated and distributed across entire organization in a click which eliminates the need to rely on IT for updates. With this, you ensure employees will always have the latest compliant, on-brand versions and are no longer using outdated templates, assets or language essentially removing any guess work.

CM: *How can marketers maintain a consistent message and experience even in tumultuous times like these? Where should they focus?*

CL: A general rule of thumb is to drive a consistent brand experience even in inconsistent times. Your content and messaging across all channels should add some form of value instead of just adding to all the noise. In today's environment, buyers are empowered, self-sufficient and digitally adept, they're not going to peruse through loads of marketing or sales content that isn't interesting or doesn't provide them with any value. Your content and messaging should highlight an understanding of the issues, problems and challenges your prospects and clients face and how you can help solve them while not just speaking to your capabilities. Buyers want to work with companies who help them and not just sell to them. There was some recent research done that found consistent branding across all channels increases revenue by 23%. With that, make it painless for employees across the organization to have proper access to and leverage on-brand content and messaging, delivering a unified, compliant, and consistent brand experience.

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