PROVOKING THOUGHT, INSPIRING ACTION:
A Recap of The Pinnacle Experience 2018

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Dallas, TX
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INTRODUCTION

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It had long since come to my attention that people of accomplishment rarely sat back and let things happen to them. They went out and happened to things.

-Leonardo DaVinci

Stacy Stout, FSMPS, CPSM, founder and brand/marketing strategist at BRANDiac Strategies, shared this quote at the beginning of the second annual Pinnacle Experience, held in Dallas, TX, October 17–19, 2018.

The Pinnacle Experience is a symposium-style learning opportunity for senior marketing and business development leaders to discuss fresh ideas, exchange unique perspectives, and learn about and share inspiring successes. This year’s attendees were challenged by thought-provoking speakers from both within and outside of A/E/C, including companies like IDEO, The Container Store, and Influence 51.

As “provocateur” for the event, Stout encouraged us to draw inspiration from the ever-curious and diversely talented DaVinci while we soaked up the content with vision and optimism. As she put it, “people of accomplishment also know there’s never an end to learning.”

We’ve compiled some of the insights from The Pinnacle Experience in the following pages. While nothing can replace the high level of engagement that took place at the event, each session summary concludes with questions to ponder, either taken from or inspired by the presentations to spark discussion and foster further thinking.

By: Holly Bolton, FSMPS, CPSM
Photo credits: Josh Miles
Why Creativity? And Why Now?

Whitney Mortimer
Chief Marketing Officer, IDEO

As the first presenter of the 2018 Pinnacle Experience, Whitney Mortimer addressed how leaders of today can take on the challenge of building resilient and agile organizations that can grow and thrive.
Whitney Mortimer’s title may be chief marketing officer, but she considers herself more a “sense-maker-in-chief.”

A partner at globally celebrated design and innovation firm IDEO, Mortimer enjoys working with leaders who have a big idea of where they want to take their organizations—or the world—but are not sure how to get there. Defining creativity as the capacity to have, embrace, and execute new ideas continually, she said, “It’s not just having ideas, but how you hold and steward them, how you execute, how you rally the troops.”

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**IDEO – Rooted in human-centered design**

Known for innovations like Apple’s first mouse and the first laptop computers, IDEO has been a leader in human-centered design since David Kelley founded the firm (then called David Kelley Design) in Silicon Valley in 1978. Today, IDEO is made up of “700 people all over the world aiming to change business and society through design,” Mortimer said.

Mortimer first interfaced with the firm as an IDEO client—senior vice president at Supercuts. She had conducted a lot of market research there, but IDEO wanted to do research of a different kind by directly observing the experiences of customers to understand their needs and aspirations.

The firm’s methodology took a much bigger stage in 1999 when ABC News profiled IDEO’s process of innovation, recording a multidisciplinary team’s work creating a reinvented shopping cart. After the show aired, IDEO’s business moved from designing new products and experiences to designing organizations that were better equipped to innovate as a competitive competence. The videos created an itch because it was about a big idea—that there’s a better way to work together.

“One plus one equals three,” Mortimer said. “Today, that idea has more resonance than ever. The problems of today can’t be solved by lone geniuses.”

Following the belief that design can change the world, IDEO started teaching leaders and businesses their methods for effective team-based collaboration. In 2005, David Kelley started the Hasso Plattner Institute of Design at Stanford—commonly referred to as the d.school—to teach design thinking to students in every department of study.

“The human factor makes all the difference,” Mortimer said. “Design in action is when you put people at the center of challenges.”

**Characteristics and values**

When it comes to assembling design teams for design thinking, Mortimer emphasized the importance of engaging multiple disciplines and looking for “T-shaped people”—individuals that have characteristics of empathy, curiosity, and optimism combined with deep skills.

Empathy, curiosity, optimism →

Deep Skills →

One of IDEO’s core beliefs is that everyone is creative and that creativity is teachable and learnable. “Creative organizations are more agile and resilient,” Mortimer said. “The old models of top-down leadership won’t work in our fast-paced world. Everyone needs to be equipped to think and work creatively.”

Mortimer also stressed the importance of having shared values. All new hires at IDEO are introduced to *The Little Book of IDEO* on their first day. “It’s a reflection of where we’ve been, where we’re going, and the values that drive our journey,” Mortimer said. “I hire and review our talent using this book. If I have a problem, it’s probably because one of these values isn’t showing up.”

As marketers, we are perfect people to bring and teach empathy skills to our technical staff!

—Pinnacle attendee
Keys to design thinking

Mortimer shared traits of design thinkers and what is involved in design thinking.

» Design thinkers listen and watch differently. They work to understand not just what people are saying and doing, but what they’re thinking and feeling.

» Design thinking takes inspiration from extreme users. Rather than thinking about the top of a curve, if you’re trying to generate something new in the world, look at the edges. Mortimer encouraged us to move from “the volume model—how many can I sell?—to how it’s going to affect someone’s life.”

» Design thinking takes inspiration from analogous experiences. This involves taking inspiration from other products, interactions, or ideas and applying them to the design challenge you’re working on.

» Design thinkers know when to diverge and converge. A brainstorm is a divergent exercise. The goal is about the quantity of ideas. It’s fast moving, with no room for judgment. During those exercises, it’s important to avoid having “devil’s advocates” in the room; save that for divergent exercises where you’re making choices and thinking critically about your best options. Prior to a meeting, determine if your objective is to get multiple ideas on the table or determine which idea is the best option.

The power of prototypes

Another key tool in IDEO’s toolbox is the prototype—an example of an idea.

Mortimer noted that a prototype doesn’t have to be a thing. It can be something tangible or emotional, a story or role playing, narrative … anything that helps the group crystallize the power of an idea. The power of the prototype is it takes the focus away from the person and onto the idea, asking questions like, “What do you like about it? What don’t you like about it? How might we make it better?”

“Use a prototype to turn conversations into a generative versus an evaluative session,” Mortimer said. The approach helps express the idea while making participants feel like they’re part of the solution. “Prototyping is one of most powerful tools we have to bring people together to have a shared conversation,” she said. “People naturally want to move toward ideas they can build on.”

The value of design-centric companies

A report by IBM, “Capitalizing on Complexity: Insights from the Global Chief Executive Officer Study,” noted that the most successful CEOs recognize the need to retool their organizations to be more creatively resilient in the face of escalating complexity.

Design-centric companies are more valuable, and the approach should be embedded in company and its leaders.

“The ability to bring better ideas to market faster is ultimately what we’re measuring,” Mortimer said. “Creativity is the most important quality for disruptive innovation and continuous reinvention.”

Questions to ponder from Mortimer’s presentation:

» Where can you gain a new insight through empathy?

» How could a prototype help you and your firm innovate?

» How can you apply the concepts of design thinking to your organization?
Rachel Kennedy’s presentation reminded us that while the industry may be different from A/E/C, The Container Store is facing the same dilemma our firms are—the fight to capture and retain talent.
Rachel Kennedy started her career in the A/E/C industries specializing in talent acquisition at The Beck Group, a commercial construction and architecture firm. Today, she’s recruiting manager at The Container Store, and while her industry may be different, they’re facing the same dilemma our firms are—the fight to capture and retain talent.

“Amazon has changed our world, the speed in which products move, and our expectations from consumers,” Kennedy said. “How has that impacted us in recruitment?”

**Foundation principles**

At The Container Store, “We’re joyful about being a solutions-based retailer, not an items-based retailer,” Kennedy said. In 1988, the then 10-year-old company had opened a Houston store at a prime location. When the store did much more business than anticipated, they had to essentially triple their staff overnight. Faced with helping new employees quickly understand the company’s culture, their chairman, Kip Tindell referred to a file he had started years ago called his “philosophy epistle file,” where he’d saved anecdotes and phrases that motivated and inspired him. He invited the Houston store staff to listen to his message that no matter how big the company became, its principles and values would stay the same.

“That was the night our culture was born,” Kennedy said. “It articulated everything we’ve been built on.” Those philosophies—which eventually became The Container Store’s Foundation Principles—center around how employees treat others and how they do business. The principles are communicated both internally and externally.

**The state of talent**

Kennedy shared some statistics that prove the hiring landscape has changed. National unemployment rate has dipped to 3.9 percent, with 6.7 million jobs available and 6.4 million job seekers. The average American will have 10-14 jobs by the time they’re 38, and the idea of work has changed. “Not every college grad is available to us because they’re choosing different routes,” Kennedy said, sharing examples from the gig economy and entrepreneurship.

Desks are empty longer, candidates have choices, and the shelf life of candidates has shortened. “We have to get to candidates faster than ever before,” Kennedy said.

**Winning the war on talent**

Noting that talent is a team sport, Kennedy outlined several tips to winning the war on talent.

» **Develop your employer brand.** Kennedy defined employer brand as the company’s reputation as an employer inside and outside the organization. She used the analogy of a candidate being a bird and the employer brand being the nest, made up of materials the birds find lying around.

“To change the nest, you must change what’s around the bird,” she said. “Control what you can.” All of the materials you can control should be a partnership between HR/recruiting and marketing. For example, one item The Container Store can control is the tape used on their shipping boxes; the tape features their Foundation Principles.

» **Craft the candidate experience.** At The Container Store, interviews take place out in the open during a normal operating day so candidates understand and know what’s it’s like in the stores and distribution centers and “there are no surprises in our interview process.” The candidate experience is much like the client experience. It involves researching, comparing, and coming to a decision. “Candidates are informed, doing research, and looking at Glassdoor,” she said. Citing the “Amazon effect,” Kennedy said, “The Container Store streamlined its hiring process, so candidates can hear from them often and move through the process quickly. "We have to streamline the process to our candidates and our clients," she said. “Make your processes easy, simple and fast.”

» **Use your weapons.** Kennedy encouraged using the tools you already have—listening and using social media and personalization. “Post and pray isn’t working,” she said. “To attract top talent, we have to go to our customer.” By using Facebook ads, The Container Store benefitted from an increase in applications as well as website conversion rates of three times what they spent. In addition, they provided social media 101 classes, which empowered employees to post and build the employer brand.

Much like The Container Store customizes their solutions for clients, they use different message for candidates depending on what will resonate with them. That personalization extends to onboarding, where they get a box of swag with their names on it.
and a handwritten note. “We want new hires to feel special,” Kennedy said. “People want to work in a place where people know their name.”

» **Retain your warriors.** “The best way to win in this war for talent is to keep your best talent in the first place,” Kennedy said. People leave companies because of role stagnation and lack of growth (#1), a better culture (#2), or better compensation (#3), so it’s important to recognize them, delight and surprise them, and thank them. From anniversaries to thanking someone for a job well done, “recognition is important and contributes to the bottom line,” Kennedy noted.

Questions to ponder from Kennedy’s presentation:

» Make a list of touch points that contribute to your employer brand. What can you control?

» The client and candidate journeys share similarities. How do you personalize the client experience in your firm?

» How does your firm recognize your warriors? How could you recognize them more?
In her presentation, Julie Huval, CPSM, shared how her company has successfully implemented 10 marketing technologies in the past year through a focus on process and trial and error.
Given the fast pace of the A/E/C industries, marketing leaders are often called to maximize their efforts while streamlining their processes. Julie Huval, CPSM, director of marketing and communications at Beck Technology, shared how the A/E/C-focused software and services company has successfully implemented 10 marketing technologies in the past year through a focus on process and trial and error.

**Mapping the process**

In the quest to maximize their marketing, Beck Technology began by seeking to understand the various ways they acquire leads by mapping their process. Through the exercise, they realized they were starting by looking at their social media interactions, clicks on their website, and email opens and clicks—then they’d audit the activity and content.

Beck Technology’s approach also included researching the contacts that engaged with them. “We don’t want to do business with people who are going to be detrimental to business, software, or brand,” Huval said. “After mapping our process, we asked ourselves, ‘What if we flip it and researched who we want to market to before they even interact with us?’”

The team did just that. They moved to a process that involved defining their ideal customers and researching contacts at the beginning of the marketing and sales cycle. Then they customized and personalized their campaigns based on each contact and where they are in the cycle.

“We moved from the shotgun approach of hoping they find us and selling to whoever trickles in to the rifle approach, looking for the opportunities we want,” Huval said.

Once their process-mapping activities identified bottlenecks in Beck Technology’s marketing and sales process, the team looked to software that would help overcome those challenges. Today, their process moves prospects through an account-based marketing/account-based sales cycle that uses a variety of technology tools.

**Supporting the process through technology**

Quick to point out that the technology that works for her company won’t necessarily work for others, Huval outlined the multiple platforms and software Beck uses to support their website, social media, sales, visual content, media relations, and project management needs.

Huval noted that technology doesn’t solve the problem, but helps the problem get solved. “If we would have implemented the tech without looking at our process, it wouldn’t have worked because we didn’t know what that process was,” Huval said. “Instead, we identified our inefficiencies or areas where we were struggling and then found the technology to make life easier.”

A portion of the software is used by their five marketing professionals; some is used by their 10 sales professionals; and some is used by both. In some cases, Beck Technology stopped using software that wasn’t working for them.

Since implementing the technologies and new process, Beck Technology has decreased their days to close of new inbound opportunities by 19 percent, increased the conversion rate from inbound requests directly related to marketing campaigns by 36 percent, and improved the sales opportunity pipeline from marketing activities by 241 percent.

Huval noted that because Beck Technology has implemented all this technology doesn’t mean all numbers are attributed to that. It also took “thinking clearly about who we want to do business with and being intentional on the content created,” she added.

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**“Honestly, I appreciate the focus on knowing what you are trying to fix and the process, and that tech is not the fix, it is the tool.”**

—Pinnacle attendee
Tech implementation tips

Huval offered several other tips to implementing technology.

» **Consider an exploration period instead of a trial period.** Many software companies will give companies a limited-time trial, but Huval suggested asking if they offer an exploration period to extend the time period as well as working with the vendor to understand the software better. “This may cost money, but it’s better to spend money on exploring software than purchasing something you won’t use,” she said.

» **Communicate and negotiate with tech companies.** Huval encouraged attendees to research vendors, understand their support systems, and get to know the people. “If you can’t have someone walk through the process with you, it’ll cost a lot more than the dollar amount,” she said. Negotiation goes beyond the total dollar amount on an invoice. Huval recommends considering, training, support, and joint marketing efforts as part of the negotiations.

» **Pick the right team members.** Firms’ implementation teams should be made up of individuals who feel the business challenge. “When it hurts, that’s when you get a sense of priority,” Huval said. Teams should include individuals who have the authority to implement and prioritize training. Team members should also own the goals and be able to communicate well—both the success stories and the setbacks—and being tech savvy is a plus. Huval pointed out that “if you have too many or not enough cooks in the kitchen, it doesn’t work. Make sure you have the right cooks and the right amount.”

» **Recognize when you need to apply change management.** Huval stressed the importance of determining if technology really is the answer by identifying your firm’s current challenges and mapping the process. “Figure out your bottlenecks, and when you can’t get any further, ask yourself if technology would help,” she said. “Sometimes it will, sometimes it won’t because it’s a matter of fixing the process.”

Questions to ponder from Huval’s presentation:

» What does your marketing and business development process look like?

» Where are your bottlenecks and pain points?

» What technology could you explore to enhance your process?
Brand Transformation: The Inside-Out Approach

Bob Fisher,
Managing Principal of Strategic Identity Practice, DI Strategic Advisors

Jennifer Sebranek,
Principal and Lead of Marketing, GBBN Architects

Bob Fisher and Jennifer Sebranek shared how they transformed GBBN’s brand from the inside out by engaging the most essential element of the professional services firm’s brand: its people.
On the eve of GBBN’s brand launch, Anne—one of the firm’s architects—and her mother made cookies and cupcakes featuring the firm’s new logo. For Jennifer Sebranek, principal and lead of marketing at GBBN, this was a defining moment. The technical staff cared as much about their new brand as the marketing team did.

This wasn’t just a marketing initiative. “It wasn’t just about the logo and the swag,” Sebranek said. “It was about a moment in time for our firm. The new brand was a signal to the world of who GBBN is and the value we bring. This would help us win the work we wanted to do, find people who wanted to join our organization, and ultimately achieve our vision.”

Sebranek and Bob Fisher, managing principal of strategic identity practice at DI Strategic Advisors, shared how they got there by transforming GBBN’s brand from the inside out. And they did so by engaging the most essential element of the professional services firm’s brand: its people.

**Establishing a new vision**

The 60-year-old firm had a great reputation for serving as architect of record and providing solid design solutions. But over the past 15 years, the firm had changed its vision to be known as an exceptional design firm that creates spaces that positively affect people. “Our market-facing brand no longer captured who we were,” Sebranek said.

In 2012, GBBN engaged a branding firm, but in 2013, they put the rebrand on hold. “We weren’t ready internally to roll out a new brand,” Sebranek said. “We focused instead on getting our house in order, doing great design work and making sure our organization was aligned on our path forward.”

That work included evolving their guiding principles from an emphasis on growth to a focus on their purpose—making lives better. They also engaged Fisher’s firm to help them surface who they authentically are by answering questions like: What value do we bring to our clients? How are we different? Who are our ideal clients?

**Creating the team**

GBBN staff involved in the rebrand varied between a core team of five and the whole firm, depending on the activity.

Sebranek noted that when a rebrand involves only the marketing team and leadership, it can become disconnected from the rest of the firm. “We needed to be very inclusive and get buy-in so it wasn’t just a marketing initiative, it was a GBBN initiative,” she said.

In that spirit, any time the rebrand team wanted to share what they discovered, they engaged technical professionals to deliver the message. “It helped elicit buy-in by having a project architect say, ‘this is how we’re different to the world,’ and made it more authentic,” Sebranek said.

Fisher added that a core ingredient to success was having the people doing the work be the spokespeople, and it was also an opportunity to engage up-and-coming leaders in being part of the team.

In addition, the approach helped educate staff about the importance and activities of marketing. “We knew, even though this would be marketing-led, much of the firm would be directly engaged, so, it was also an opportunity to educate leaders, practitioners, and staff about the marketing function and the marketing team,” Fisher said.

**The inside-out approach**

A traditional pitfall with a rebrand is being “artifact-focused,” placing too great an emphasis on items such as a new logo, website, and marketing collateral. Working from the inside out treats rebranding first like an organizational change initiative, contributing to an aligned brand within and outside of the firm.

“You start with a basis of values,” Fisher said. “It’s essential to establish what your firm truly stands for and build from there.”

The values drive the vision, which drives the strategic business plan, which drives the brand plan. Every time GBBN took a major step, they checked to make sure it had integrity with who they were and where they wanted to go.

“The brand is made up of where internal reality, external presentation, and market perception meet,” Fisher said. “The lived beliefs are more telling than the artifacts.”

Noting that perception is reality, Fisher discussed another common pitfall—the integrity gap.

“It doesn’t matter who you think or say you are if the market has a different view,” he said. “If there’s any difference between who you say you are and what people experience, there’s an integrity gap. If you don’t deliver on your brand promise they think, ‘they lied to me’ or ‘they aren’t competent enough.’ Neither of those two is the reputation you want to have.”

In spirit of GBBN’s inside-out approach, the team conducted market research after they had developed ideas that would...
be part of the brand plan and strategy. This allowed the team to measure against what they were hoping to achieve while testing both old and new messaging.

**The artifacts**

When it came to the graphic identity of GBBN’s new brand, Sebranek said they wanted to make a splash.

“Whatever we made would be a symbol of what people had come to believe the firm could be,” she said. “We needed to do well for the investment to pay off.”

Sebranek encouraged setting goals in order to get the right consultant on board and deciding what qualifications are most important. GBBN determined that creativity was extremely important and engaged a graphic designer from outside of the A/E/C industries.

“We needed a fresh set of eyes, like our clients do,” she said. “In the end, we wanted someone who would push us to the uncomfortable.”

Fisher’s role was to be the bridge between the creative firm and GBBN to make sure each party got as much out of each other as possible.

GBBN’s resulting message is about enhancing experience and empowering people.

To help roll out that message, rather than giving employees a script to follow, GBBN put together a program that included storytelling training so staff could align their authentic experiences with the brand messaging.

In addition, Sebranek said little touches like handwritten notes from the CEO on boxes of new business cards were a way to take something ordinary and make it special and enhance buy-in.

**Success factors**

Fisher and Sebranek shared four factors for a successful brand transformation.

1. **Build on the right foundation.** Focus on your values first to maintain continuity and alignment.

2. **Go beyond buy-in.** All you need to have buy-in is consent, but GBBN wanted belief.

3. **Focus on quality of the team and process; the quality of the end product will follow.** Who are the right people to have involved?

4. **Internal communication is the lifeblood.** Give people the tools to tell their best version of the story. Also, keep people informed and involved in the rebranding process to ensure they are connected to the end result.

**Questions to ponder from Fisher and Sebranek’s session:**

» How aligned are your values and vision with your brand messaging?

» Are your clients truly experiencing what you are communicating?

» How can you engage non-marketing professionals in marketing initiatives that advance your firm?

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This presentation made me realize the depth of the rebranding endeavor.

—Pinnacle attendee
What Makes a Powerful CMO?

Dr. Pravin Nath,
Assistant Professor of Marketing, Division of Marketing and Supply Chain Management, Michael F. Price College of Business, The University of Oklahoma

As the head of the marketing function, the chief marketing officer (CMO) often faces an uphill battle. Based on findings from academic research, Dr. Pravin Nath shared how CMOs can be powerful within their organizations.
Marketing represents a vital function within the firm, yet it's often given short shrift in strategic decision-making. As the head of the marketing function, the chief marketing officer (CMO) often faces an uphill battle. Based on findings from academic research, Dr. Pravin Nath, assistant professor of marketing, Michael F. Price College of Business, University of Oklahoma, shared how CMOs can be powerful within their organizations.

**Marketing’s seat at the strategy table**

As an executive in the top management team, CMOs are present in 40 percent of public firms. But, as Nath noted, they face a fast-revolving door—often a result of a misalignment of expectations versus performance. To break the cycle, it takes having more power and influence.

**What explains a CMOs power?**

“If you have power, people depend on you,” Nath said. During his presentation at The Pinnacle Experience, he outlined five elements that are key to a CMO’s success:

- **Criticality**
- **Effectiveness**
- **Indispensability**
- **Control (decision-making authority)**
- **Centrality (exchanging resources with other functions in the firm)**

The resources a CMO can control, which help with power and influence, can be divided into four categories:

1. **Human:** Skills and expertise based on education and experience.
2. **Informational:** Knowledge and data collected about potential and existing customers, competition, and the market.
3. **Relational:** Networks with customers and service providers.
4. **Organizational:** Marketing capabilities—putting everything together and being able to look from the outside in. This is uncommon without the other three resources.

**Increasing the criticality of the CMO/CMO’s resources**

Many firms’ markets have become more complex over time, which means marketing leaders have an opportunity to make themselves more critical to a firm’s success. “There is always something changing,” Nath said. “That’s not really a problem as long as you can present it as an opportunity. Our markets are complex, so what can we do to differentiate?”

He shared several ways CMOs can increase the criticality of their resources.

- **Be the voice of the customer/brand in strategy formation and implementation.** “Tell others what the marketplace is seeking and what’s happening with the competition—it’s a way to increase criticality,” Nath said. From conducting surveys and understanding analytics to reading trade publications, CMOs can share insights on trends and what their firms should be thinking about.

- **Align the brand with the customer experience.** Marketers should think about how customers—and their customers’ customers—experience their firm’s brand.

  “Can you do something different because your customer’s context has changed?” he said. “Conversations become more about, ‘let’s go to marketing because they have a good handle on how our customers are evolving.’”

Nath encouraged having a service mindset, with value defined and co-created with the consumer.

Another aspect of aligning the brand with customer experience involves moving beyond storytelling. As Raja Rajamannar, CMO of Mastercard, put it, “Our strategy is not to tell stories but to enable customers to make stories they tell their friends and family; to create and curate story material.”

A strong brand story connected to the customer experience creates excitement. “If you raise the level of conversation in your organization and it’s centrally connected by a thread, the customers perceive that,” Nath said.

- **Work within the context of the company’s needs.** The CMO’s value creation zone (a phrase inspired by Thomas Barta and Patrick Barwise) takes place at the intersection of the CMO’s resources and the company’s needs.
“Think about the customers, think about the common thread, and pull what is relevant to your company,” Nath said. That takes a clear understanding of the issues the firm’s leaders are concerned about.

Measurable impact and financial accountability should also be top-of-mind for the CMO, as Nath’s research found that sales growth is a stronger determinant of CMO turnover than profitability. While there are many tools to help measure return on investment, it’s also important to look at ROI based on specific campaigns, as well, and what types of content and activities create the most value and revenue for your firm.

Nath also emphasized the importance of new initiatives, as “marketing and firm innovativeness are related to greater CMO power.”

**Increasing the centrality of the CMO/CMO’s resources**

» **Interact with other functions in your firm.**
Increasing centrality requires having fruitful interactions with other departments. CMOs often need resources of those who don’t report to them. In addition, collaborations with other departments reinforces the service mindset of creating value. “When CMOs talk with other functions, they get a 360-degree view of the needs of the customer,” Nath said.

» **Create opportunities to exchange resources.**
Work with other departments to gather inspirational customer and employee stories; craft informative whitepapers, case studies and newsletters; encourage employees to advocate for the firm on social media; and focus on having empathetic conversations with colleagues.

**Increasing effectiveness of the CMO’s resources**

**Expertise fills the gap of skills.** Effectiveness requires having the right talent and skills. Noting that digital marketing technology is changing rapidly and “you will never know as much as you need to know,” Nath encouraged investing in training and expertise in that arena.

“Digital spending will overtake other forms of spending in five years,” he said. “If 60 percent of marketing is going into that space and you don’t have that expertise, it’s going to be a problem.”

**Emotional labor fills the gap of passion.** Nath also encouraged attendees to start thinking of themselves as creators and inventors. “Think of your work as art,” he said, pointing that people put their faith in people who are passionate about what they do. “An artist uses bravery, insight, creativity, and boldness to challenge the status quo, and art is never defect-free. Art is a personal gift that changes the recipient.”

**Culture and metrics.** Culture and metrics are important aspects of a CMO’s effectiveness, and they both require a delicate balancing act.

» **Formulation versus independence:** Are there too many or too little rules?

» **Centralization versus delegation:** Does everything have to go through the CMO or is the CMO too much of a delegator?

» **Satisficing versus excellence:** At some point, you have to ship and deliver.

» **For metrics, are you looking at both short-term and long-term? Soft versus bard?**

**Control over resources and CMO indispensability**

CMOs should focus their work on the future and know they will always encounter naysayers and doubters. Powerful CMOs have control over their resources and making themselves indispensable. When it’s time for layoffs, Nath said, quoting Seth Godin, “the safest job belongs to the artist, the linchpin, the one who can’t easily be outsourced or replaced.”

**Questions to ponder from Nath’s session:**

» What are some instances when your resources have been critical in your firm?

» How can you change or improve interactions that you and your marketing teams have with other departments to become more central to the strategy dialogue?

» What resources do you need to cultivate to deliver meaningful metrics for your firm? Help you understand your clients? Enable innovation?
During his presentation, psychologist and behavioral scientist JonRobert Tartaglione reviewed The Five Principles of Influence—the five most important things to know about how people are influenced in order to optimize any influence strategy.
Influence is inextricably intertwined with success. Those who understand how to wield influence also wield the power to change how people think, feel, and ultimately act. During his presentation, psychologist and behavioral scientist JonRobert Tartaglione, founder and CEO of Influence 51, reviewed The Five Principles of Influence—the five most important things to know about how people are influenced in order to optimize any influence strategy (see below). The session also included table activities that allowed attendees to operationalize The Five Principles through scenarios.

» Principle 1: 
  *The human brain is not a computer.*

» Principle 2: 
  *Our social nature matters.*

» Principle 3: 
  *Our political sensibilities matter.*

» Principle 4: 
  *Timing and priming matter.*

» Principle 5: 
  *Structure of presentation matters.*

For an in-depth look at The Five Principles of Influence discussed at the session, please refer to the SMPS Foundation’s recent report by Tartaglione, *The Neuropsychology of Influence and Decision-Making*, which is complimentary to SMPS members.

Questions to ponder from Tartaglione’s presentation:

» How have you experienced The Five Principles of Influence in your work and life?

» How can you use The Five Principles of Influence to inform your next project pursuit?
Get Your Head Out of Your Bottom Line

Jackie Dryden
Chief Purpose Architect, Savage Brands

During the closing keynote, Jackie Dryden wondered aloud how different it would be if everyone was excited to get up and go to work each morning. She explored how people stay at companies because they’re doing something they value and believe is important. They believe they contribute.
During the closing keynote of The Pinnacle Experience, Jackie Dryden, chief purpose architect at Savage Brands, wondered aloud how different it would be if everyone was excited to get up and go to work each morning. “Mission, vision, and values statements are not what motivates people,” she said. Instead, people stay at companies because they’re doing something they value and believe is important. They believe they contribute.

“When did we decide success is all about money?” Dryden asked. In elementary school, our job was to get good grades so we could get a good job and make money. Today, “we’ve traded dollars for dollars.”

Instead of focusing on the dollars, Dryden emphasized the importance of focusing on what you’re passionate about and what “lights you up,” both for individuals and companies.

“What is it about your organization that makes you stand out?” she said. “That’s how you recruit, train, and retain the best people. You’re with a group who care about doing something of value for the world, together.”

Dryden talked about singer and songwriter, Janis Joplin, and how she would rather sing a few years authentically than sing a lifetime like everyone else.

“We all wanted to be brave like Janis,” Dryden said. “She was an amazing example of what happens when you defy the odds. When you’re not the best. When one human stands up for themselves. What does it look like when an entire organization does it?”

Dryden shared the story of Southwest Airlines, the only airline to refuse charging for their bags when the airline industry was suffering. The strategy that would have added $350 million to the bottom line, but Southwest was formed around the idea of democratizing the skies. Charging for luggage would have gone against their philosophy—and their decision proved successful in the end.

“Saying no to something is counter to purpose,” Dryden said. “That’s what purpose does for you … gives you a simple, clean measurement against which every decision should be made.”

Dryden told another story about how Southwest’s CEO, Herb Kelleher, wrote a letter to a customer who was constantly complaining. The letter said, “Dear Mrs. Crabapple, We will miss you. Love, Herb.”

These Southwest stories demonstrated the importance of standing by your principles and purpose.

“I don’t believe in listening to customers first; listen to them second,” Dryden said. Companies should be clear on what they stand for and then get people who care about the same thing.

Dryden cited the Mark Twain quote, “Two most important days of your life are the day you’re born and the day you find out why.”

“What are you doing today to serve others, to make the world a better place and put your head on the pillow at night and say, “I did good today”?” Dryden said. “It’s not about what you get, it’s about what you give.”

Dryden showed a video that illustrated the importance of spending your time doing things you’re passionate about, both personally and professionally.

“What’s the good you want to be a part of?” she said. When you find a group of people who share your passion and want to achieve the same thing, “you become unstoppable.”

Dryden shared a three-step process of focus, filter, and fuse.

**Focus** is your purpose—why would someone want to work for you or be your client? In discussing focus, Dryden provided definitions for several terms that companies use. Your purpose is your cause. Your mission is how you differentiate in the way you deliver on that purpose. Vision is a phrase that motivates people to see that future and take that journey with you. Values are the principles you must infiltrate into your culture to make it real.

“It’s all words on paper until you get to the behaviors and demonstrate who you are day in and out,” she said. “You can hire, train, and retain based on behavior—it tells you how to live that value.”

**Filter** is creating your strategic plan and roadmap that allows you to deliver on the focus.

**Fuse** is how you infiltrate your focus into your culture, story, and materials.

You can learn more about Dryden’s topic in her book, *Get Your Head Out of Your Bottom Line.*
Questions about our purpose to ponder from Dryden’s session:

» Why are you here? What gets you—and keeps you—fired up? What is it that—if it went away—you’d crumble and feel like you’re not yourself?

» What can you do to improve the lives of others? What is the impact you wish to make?

» Who shares your passion? Ask them the same questions.

» How are you showing up? What is tangible evidence today that you are pursuing your passion?

“

Inspiring to have the courage to find and live your passion ...

—Pinnacle attendee
Parting Thoughts by Attendees

The Pinnacle Experience left attendees inspired. Here are a few words from participants, ranging from ideas gained to overall thoughts on the event.
Everything was intentional and well thought out. I felt valued, appreciated, and encouraged to get the most out of the experience.

—Mindy Hinsley, CPSM, President, Hinsley Collective

The Pinnacle Experience provided the best high-level ideas that I’ve seen in a while.

—Julie Woodman, CPSM, Business Development Specialist, The Sextant Group

I really liked the speakers that were from outside of our industry. They made me think about the issues I am facing from a different angle.

—Barbara Stiles, FSMPS, CPSM, Vice President, Business Planning, WGI

The Pinnacle Experience is one of the best senior level learning experiences I’ve been to in a long, long time!

—Bonnie Temple, CPSM, Regional Marketing Leader, Kittelson

Dollar for dollar the best conference investment hands down—the intimate setting (limited attendance), linear format, resonance, and quality of content, and peer-to-peer networking. It’s a niche event, highly valuable to the target demographic.

—Dara Davulcu, Director of Marketing, Skiles Group

The Pinnacle Experience is a valuable investment because of the excellent content and the level of registrants—firm leaders and senior marketers with common issues. Also, it attracted many people who you don’t get to see at Build Business or a regional conference, making it a valuable networking opportunity.

—Michael McCann, FSMPS, CPSM, Sr. Business Development and Marketing Manager, The Clarient Group

I loved the interactive sessions that stopped for discussion and offered the opportunity to apply what we were learning.

—Courtney Van Ostran, Director of Marketing, Tec Inc. Engineering & Design

The Pinnacle Experience reinforced that everything should be rooted in purpose, passion, and empathy with a clear sense of why ... it was a great conference and it came at just the best time for me professionally. I am ready to sign up for next year!

—Scot Fairfield, Principal, Director of Marketing and Development, FGM Architects
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The Pinnacle Experience 2019:

November 13–15, 2019
The Four Seasons Hotel Denver

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