

Welcome

WELCOMESOFTWARE.COM

How to Keep Your Messaging & Brand... On-Brand

Trends & templates
based on data from
500+ marketing leaders

- ▶ Freshly minted trend research, from budgets to channels to team burnout & more
- ▶ A useful (yet fun?) comms & brand process template
- ▶ Gartner's assessment of what you need in a marketing comms platform
- ▶ Plus, tons more tips & tricks for how you can inspire your audiences in 2021







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**Keeping your
entire brand,
on-brand, no
matter what
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the world...
can you even
think of a time
when that's
been more
difficult?**



Here you are. One year out from the onset of the pandemic.

Let's be real...your main goals haven't really changed, have they?

You're still aiming to keep your messaging and brand on-brand – to manage your reputation, to tell your story, to ensure that story remains consistent across everything your org releases. As you always have, as you (probably) always will.

Yet nobody's favorite virus, COVID, has thrown marketers off in their pursuit of this aim. No, the comms, brand, and PR 'north star' hasn't shifted, by and large. But COVID has shifted communications marketers' ability to reach it.

Actually, that's an understatement. Keeping your entire brand, on-brand, no matter what happens in the world...can you even think of a time when that's been more difficult? We can't.

So here's an entire guide to help you answer this question:

“How can I keep my messaging and brand, on-brand – during this particular moment in time?”

Hopefully, by the time you've finished...

- ▶ combing through *Welcome's* proprietary trend research,
- ▶ filling out the useful yet fun comms & brand process template,
- ▶ and reviewing the final action items

...you'll pinpoint the next steps you & your team can take to better manage your brand's public perception and comms initiatives in 2021.

Let's dive in.

TRENDS

The Story in the Stats

Before we drill down into the actionable steps you and your team can take, today...

...let's explore why and how keeping your brand on-brand has never been more challenging.

In March 2021, *Welcome* teamed up with the brilliant minds at Sirkin Research to survey hundreds of marketers.

Branding, PR, and communications leaders just like you told us how they're faring right now, compared to how they were doing at the onset of the pandemic. They discussed their greatest obstacles, the way they work, their team dynamics, and so much more.

There are trends in the data and personal accounts we received, and they tell a story.

Not just one story, in fact. Several clear stories emerged around the priorities and difficulties communications marketers currently face across all levels of the comms and brand marketing creation process: planning, collaboration, and execution.

Don't worry. The stories and trends here aren't entirely negative. There are some unexpectedly good bits of news, which you (and your team) can use to your advantage.

So what, exactly, is impacting comms, PR, and brand marketers' ability to keep their branding and messaging consistent?

Let's explore.

At the Planning Level...

(the story of **One Big Change in Plans**)

Now, on a high level, when we asked comms and brand leaders (you? your boss?), “What does demonstrating results mean to you?”, both pointed to **building brand awareness** (the #1, most important factor), **boosting content performance** (#2), and **proving how their efforts impact the business** (#3).

In other words, it’s all about what your external *and* internal audiences are able to see. As one survey participant put it, **“[COVID] has made a reactive job more reactive. It’s harder to stand out and make your comms rise above in the flurry of emails/Zoom events.”**

- ⊗ Making it more difficult for the public to **see** your brand, what you’re all about...
- ⊗ ...and for your internal org to see *which* of your (increased number of) initiatives is driving results.
- ⊗ A brand leader we spoke to pontificated, “How do we maximize brand awareness, moving with speed and purpose, without creating random campaigns that won’t deliver ROI?”

So from a comms perspective, for better and for worse...boy, have things changed.

- ↗ For better, in terms of performance, despite the job becoming more difficult: **28%** say their **communications and brand marketing** have improved significantly, by at least 10-20%.
- ↗ For better: **64%** say **social, email, and content** are performing **better** as a result of COVID.
- ↘ For worse: **74%** say **field marketing and events** have been performing worse. Not a surprise, but still – two key communications channels were all but eliminated.

The changes and pivots are giving marketers whiplash. **65%** of marketers say **“frequently shifting priorities”** is their **#1 challenge**.

One comms leader explained, **“[COVID] Completely changed the way we work in terms of priorities (they constantly change) and the way that we gather information for projects. Collaboration can be difficult at times.”**

TRENDS

At the Collaboration & Execution Level...

(the story of **More, More, More**)

More tools: We tried to keep business...‘as usual’ as possible. **44%** of marketers say their companies made incremental investments in **collaboration and workflow tools**.

- ▶ Makes sense, seeing as the **#1 bottleneck** for marketers right now is the **content and asset creation process** (requesting work, ideating, creating, editing, waiting for finalized work from content teams).
- ▶ One brand marketer highlighted how shifting priorities play a role here: “There have been lots of pivots, changes in messaging...which increases changes in content and assets.”
- ▶ Additionally, **11%** noted incremental investments in **resource management** tools.

Are all the new resource management and collaboration tools helping? Maybe, maybe not:

- ↘ **38%** of marketers say **deploying teams and resources** is more of a challenge now than pre-COVID.
- ↘ **45%** say **collaborating in real-time** is also more of a challenge today.

More meetings: Not to mention the **65%** who say the sheer **number of meetings** (planning meetings, team check-ins, etc.) is more challenging to work around.

- ▶ What’s with all the meetings? They could be necessary to deal with issues around **governance**. Comms and PR folks told us that governance – ensuring content adheres to brand standards – is the **#1 challenge and second-biggest bottleneck** they face.
- ▶ One respondent even told us that juggling “multiple conflicting demands from different business partners who ignore brand standards” is keeping them up at night.

More work: With the absence of key channels and the boosted performance of content during COVID, organizations placed more demands on content marketers...

More pressure: ...which goes hand-in-hand with more pressure. **48%** of marketers say the **pressure to perform** has worsened, which our survey takers frequently cited in their responses.

"There's a drive to exceed expectations and partner like never before."

"We face a reduced staff, pressure to do more and shifts into markets we've had no experience in quickly. Plus, unreasonable expectations."

"Every team has more pressure to perform and deliver revenue. And given that marketing is a natural hub for this activity...it's been much more challenging to meet the demands of my organization."

"We have done more work with less money, but now that's the expectation and less help is given to Marketing overall."

TRENDS

At the Human Level...

(the story of **No Off Switch**)

Let's zoom out for a minute: As of March 2021, burnout and stress have decreased. **Only 15%** of Americans feel burnt out today, versus the 26% who felt this way over the past year. And **20% fewer** Americans are feeling stressed in 2021.

Unfortunately, this doesn't ring true for marketers. The increased pressure to perform is one reason why **over 61%** of marketers say their **stress levels and work/life balance are worse now** than in 2020. In their own words...

- ⊗ *"The increase in general anxiety has really pushed a lot of people to the edge of burnout."*
- ⊗ *"We all work more hours and there is a total mix between our personal and professional lives, which is a danger."*
- ⊗ *"Meetings and scope creep across teams and there's a ton of personal burnout, as teams have had a tough time 'turning off.'"*
- ⊗ *"The team feels 'always on' – due to the increase in meetings, decrease in productive time during work hours, and the day starts earlier/ends later."*

And, did you know? We're not "off" even when we're unconscious. 1 in 4 Americans report experiencing strangely vivid, frightening or stressful dreams during March 2021.



"COVID caused me to think about my future at my company."

Another factor not helping the situation: Although unemployment is coming down (in the US, it fell from 14.8% in April 2020 to 6.3% in January 2021), **38%** of marketers are feeling a **lower sense of job security**. Our survey participants said it best:

- ⊗ *"There's uncertainty about job security, despite my company's success."*
- ⊗ *"COVID caused me to think about my future at my company."*
- ⊗ *"Uncertainty dominates everything. Any sense of psychological safety we had in the workplace is gone."*

But this story isn't as negative or straightforward as it seems. For some marketers, the burnout, stress, new demands, and pressure are actually **paying off**. After all, pressure creates diamonds, as they say.

↗ One example? Productivity soared. **46%** of marketers say their **team's productivity has improved** in this new environment.

↗ "Productivity," by the way, got better than everything else. It improved **more than any other factor** (such as pressure, stress, job security) we analyzed.

Furthermore, despite being physically apart, the heightened challenges spurred some teams to **develop closer relationships**.

- ↗ **24%** say their **professional relationships became stronger** overall.
- ↗ For **28%** of marketers, the sense of **trust among team members grew**.

The comms leaders and brand marketers we spoke to weighed in:

- ♥ *"We trimmed a lot of the fat and everyone is much more emotionally in tune with the challenges that others face."*
- ♥ *"[Remote working] actually improved communication and collaboration a ton. We are forced to meet more often and to have those meetings be more effective, since we can't meet in person. As a result, there's more trust and more accountability."*
- ♥ *"The continuous recalibration of priorities has forced us to bond together and communicate more than ever."*

TRENDS

As for the Future...

(the story of A [Remote] New World)

We just want a shot 📌 : In the US alone, as of April 2021, **36%** of adults were vaccinated against COVID.

- ▶ Which is one reason why, in March 2021, **40%** of Americans (up from 26% in January) said they expect to return to a normal-ish, pre-COVID-like life within the next six months.

Despite this anticipated return to normalcy, the marketing world will likely remain largely remote.

54% of respondents expect at least **70%** of the marketing workforce to work remotely through 2021.

Still, for marketers, the idea of “returning to the office v. staying remote” is as polarizing as today’s politics.

Marketers **in favor** say...

- ♥ “My team has adapted pretty well and I anticipate it will be a challenge to get us to come back to the office.”
- ♥ “It allowed us to find talent, regardless of geographic location.”
- ♥ “Working from home is fantastic and I hope it continues FOREVER!!!”

...and some **object**.

- ⊗ “Focus seems to be an issue, now that the novelty of so many Zoom meetings has worn off.”
- ⊗ “Worried about the long-term impact of working in this environment.”
- ⊗ “Working remotely has curtailed our highly engaged, collaborative environment, despite technology. Content takes longer, more rounds of revision – frustrating. We will be heading back to the office in Q4.”

Marketers’ varying views of remote work line up with those of the general workforce: **25%** of US employees said they would like to work in the office five days a week, while 20% said they never want to step foot in an office again.

"Working from home
is fantastic and
I hope it continues
FOREVER!!!"

Worried about the
long-term impact
of working in this
environment."

Do you think your communications, PR, or brand team will be able to relate to these sentiments? We think they will.

So, now that you have a full picture of the state of marketing, laid out in your mind... consider what's making it more difficult for your team to keep your messaging and brand, on-brand, at this present moment.

What changes might you implement? More importantly, how can you spot sources of struggle and areas for improvement in your communications and brand process?

Luckily, we've created a comprehensive (yet fun!) exercise to help you and your team do just that. Keep reading to get started...

TACTICS

Harmonize Your Comms... with **The** **Marketing** **Orchestration** **Template**



What's the key to keeping your messaging consistent?

It all starts with managing your process strategically – ensuring all the moving parts (and team members!) within your marketing process are working together, in harmony, to execute the larger marketing strategy. Like a conductor does with their orchestra. Which is why we call this **marketing orchestration**.

This quick template will help you take the first step towards becoming a lean, mean, well-orchestrated comms machine – **identifying uncertainties and inefficiencies in your process that aren't in tune with your strategy**.

After all, you can't solve problems if you can't quite locate where they lie...

Which is why you should fill out **The Marketing Orchestration Template** to get a full view of how your team works.

You'll be able to visualize all the steps your team takes to push communications out the door, pinpoint exactly where the roadblocks are in your workflow, and which parts of your process to refine first.

Time to make some (marketing) music.

























How to Get Started:


1. Below are the 4 general stages of brand marketing, PR, and communications processes – Planning, Creating & Requesting Work, Reviews & Approvals, Publishing. Every box with a musical note 🎵 represents a step in the stage. In the 'notes' within each stage, write down each step that your team needs to take to complete it, from the beginning of the stage to the end. *Note: We know that some steps may not happen sequentially – they may need to happen at the same time. Which is why we've included 3 'notes' along each point in the timeline.*
2. After identifying each step, write down any roadblocks that make that step difficult for your team to complete. Roadblocks might include...
 - a. A lack of clarity among your team about how this step fulfills wider goals
 - b. Uncertainty around how this step should be completed...or who should be completing it
 - c. Any tools or requirements making this step extra difficult (or inefficient) to complete
3. After you fill out this template, have your team do the same. Get on a quick video call to see if you and your colleagues identified the same roadblocks, for the same steps. Doing so will help you indicate which issues you should knock out, first.


Good luck!

THE MARKETING ORCHESTRATION TEMPLATE

Start of Phase


Stage 1: Planning	STEP:  ROADBLOCKS:	STEP:  ROADBLOCKS:
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Stage 2: Creating & Requesting Work	STEP:  ROADBLOCKS:	STEP:  ROADBLOCKS:
	STEP:  ROADBLOCKS:	STEP:  ROADBLOCKS:
	STEP:  ROADBLOCKS:	STEP:  ROADBLOCKS:
Stage 3: Reviews & Approvals	STEP:  ROADBLOCKS:	STEP:  ROADBLOCKS:
	STEP:  ROADBLOCKS:	STEP:  ROADBLOCKS:
	STEP:  ROADBLOCKS:	STEP:  ROADBLOCKS:
Stage 4: Publishing	STEP:  ROADBLOCKS:	STEP:  ROADBLOCKS:
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End of Phase



End of Phase



End of Phase



End of Phase

The Final Checklist

Well, here you are, at the end of this issue.

You've absorbed how your brand marketing, communications, and PR colleagues are faring via the [Trends](#), you've pinpointed your marketing roadblocks via [The Marketing Orchestration Template...](#)

Now, it's time to take action.

Here are actionable steps you and your team can take to better collaborate, coordinate, and – of course – [keep your messaging and brand, on-brand.](#)

But don't just take it from us. Take it from Gartner, which – for the 4th year in a row – named *Welcome* a *Leader* among CMPs, placing us at the top of its Magic Quadrant.

In 2021, this accolade feels extra special. For the past three years, our team was recognized by Gartner under our former brand, NewsCred. Ranking high on the Magic Quadrant – this time, as a marketing orchestration platform – is a powerful signal that the future of marketing *is* in orchestration.

Below are key ways you can keep your communications and brand on-point by waving your (orchestration) conductor wand...

...alongside Gartner's key points from the Magic Quadrant report ([get the full analyst report for free, here](#)) showing what you should value in a CMP.

Go through each of the points with your team, discuss, and [click to check them off](#) ✓ when you're done.

Happy orchestrating!

The Checklist

Keep your team on-brand – no matter what happens – by establishing one workspace.

As 2020 confirmed: It's a wild world out there. Meaning unexpected events *will* happen, that *will* impact your brand...and it's up to your team to determine how to respond. Immediately.

Yet "immediately" is often impossible. Because everything that needs to happen to roll out a quick communications plan often happens in too many places at once: Google docs, Slack threads, publishing tools, back-and-forth email chains.

Leading to stress, confusion among team members, and messaging that's off-brand or misses the mark.

In 2021, these issues will persist in orgs that stay remote *and* have a decentralized comms process.

Make sure everyone is amplifying the same story by outlining **the entire plan** within a single workspace: a central place your team knows they can visit to clearly see...

- ✓ Status updates for every campaign – and any sudden changes or new developments to the plan

- ✓ All the steps in the plan, and who's responsible for each
- ✓ How every initiative furthers overall, strategic goals
- ✓ All assets and content needed to execute each initiative

A place like *Welcome*.

As Gartner noted, **"Welcome's vision as a marketing orchestration software, combining the capabilities of a CMP, MWM and DAM, offers promise."**

And, of course, these core capabilities are housed in one centralized, organized platform.

Plus, *Welcome* can take on additional functionality through a whole suite of integrations...and we're always adding more.

What does all of the above mean for you? It means no more back-and-forth between software tools (the average marketer, by the way, uses a minimum of 5 tools to launch a single campaign*). It means no precious content will get lost or altered in the transfer from one platform to the next. It means you'll save time.

And, you won't need 10 browser-clogging tabs open with 10 different tools at all times. Your laptop will thank you. And stop making that wheezing noise.

THE CHECKLIST

Leverage sharing and editing tools to nail collaboration.

As you know better than anyone: Building a brand is a collective effort. Maintaining and upholding said brand is *also* a collective effort.

Yet, for communications and brand marketers, “collaboration” was cited as the #1 challenge, that has increased the most from 2020 to 2021.

Our hypothesis: Collaboration is not only more difficult due to our remote work-ified world, but also because comms and brand marketers – more so, perhaps, than other marketers – must often collaborate closely with people outside their core team, both internally *and* externally.

Meaning folks in comms and branding spend (even more) time simply getting outside teams up-to-speed, before the real work begins. More time scrambling to figure out which brand resources collaborators need access to, where to find those resources, where to find the latest *version* of those resources, who has permission to view what, etc.

The solution? It lies in always having **collaboration kits** at the ready, and defining **the right level of access** ahead of time, for the internal and external collaborators your team regularly works with.

For each type of collaborator – say, a PR agency – create a folder in one central location that has all the resources they’d need (style guides, content templates, brand guidelines, etc.) to maintain your brand’s integrity...and nothing they *don’t* need. Doing so will make coordinating every initiative infinitely faster, prevent inbox overflow, and give you and your collaborators more time to actually...collaborate.

Welcome makes collaborating with anyone – agencies, freelance writers, other teams in your org – a straightforward, error-free and (truly!) *fun* process:

- ✓ **Intuitive Digital Asset Management (DAM):** Rather than having to wade through 5 random cloud drives to find a brand asset...*Welcome*’s DAM is the single place you can store and share *all* your assets, no matter the file type. Easily find what you need through the intuitive search function, ship files to any collaborator, and integrate assets into your workflows.
- ✓ **Dynamic Content Editors:** Collaborate on any type of content (videos, images, PDFs and more) with *Welcome*’s powerful editors. All collaborators can dive right in to annotate, comment, and even draw on content; it’s easy to indicate exactly which edits should take place, and where.
- ✓ **Version Control:** Once you’ve gone through all 7,000 rounds of editing (just kidding...), prevent any confusion around which version is the ‘right’ one. *Welcome* displays each draft of an asset in progress – it’s clear which one is the latest or ‘final’ version. And once a piece of content is complete, you can see exactly how your team is utilizing and sharing it.

Embrace calendaring to tell cohesive, consistent stories.

Don't just focus on each individual piece of thought leadership or a single news release. Your messaging will be more consistent – and therefore more powerful – if it, collectively, tells a larger story.

Connect the thematic dots between each piece of content, for your team and your audience, by getting your communications schedule on one, shared calendar. Then, on that calendar, categorize your content and PR initiatives according to each broader story you want to tell – which should directly correspond to an overall marketing or even business goal you want to hit.

For example: Let's say you sell frozen meals, one of which is mac and cheese. If you create a bunch of content highlighting stellar reviews of your mac and cheese in food blogs...that would constitute one story. And it would probably make you hungry.

Anyway, one recommendation: Color code each category, so it's easy to see and differentiate between your brand storylines.

The benefits? You'll get an overarching view of how your audience is exposed to your brand over time. You'll determine which stories you're overtelling, which ones you're underselling, and whether or not your cadence is resonating with (or confusing) your audience.

~~"Why are we doing this again?"~~

Another critical capability for CMPs, according to Gartner? Ding ding ding, you guessed it: content calendaring and communications planning.

Welcome's integrated marketing calendar keeps your content cohesive through...

- ✓ **Shared, Global Strategy Views:** *Welcome* is structured from your main goals, down – so you can get at-a-glance views of how every activity, from a single thought leadership piece to a large media campaign, ladders up to your grand strategy. No more, "Why are we doing this again?"
- ✓ **Separate Planning and Publishing Views:** Make it easy to see content planning (drafts, approvals, etc.) and when content will be published...and distinguish between the two schedules.
- ✓ **Saved Views & Advanced Filtering:** See what's important to you – and nothing more. Create and save filtered views, whittled down across target audiences, geography, channels, or your own metadata.

THE CHECKLIST

Keep everything correct with “copy-&-go” brand compliance checklists.

To keep your brand on-brand, every time...

You need to set up your brand’s **orange cones** – all the brand and legal standards content must meet before it can be published – in a place where no one at your org can circumvent them.

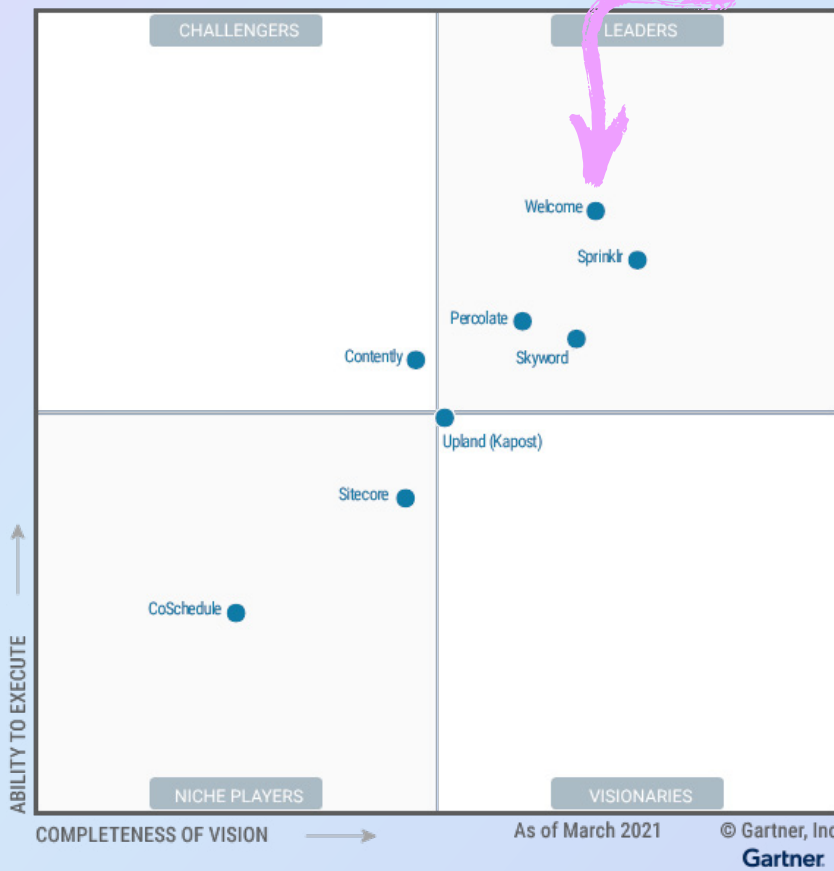
And for brand consistency, it’s critical that your team doesn’t forget to check that a sacred standard is being upheld – a writing style standard, a branded design element, etc – before approving an asset. Even a tiny “off” detail can make an entire piece off-brand. Really.

So, one safeguard you can implement? Create the checklist of all checklists: Outline every brand and legal governance item that must be examined, *once*. Then, for every asset you produce, just copy-and-paste the checklist into your workflow! It’ll be easier for your team to review assets against the full list of brand and messaging guidelines, and flag anything that’s non-compliant.

This is particularly helpful for organizations with lengthy, highly detailed compliance and approval processes. Your team will always know exactly what to check, they’ll never miss a single step, content can be approved much faster...and you’ll have one less admin-task headache.

As Gartner put it, “B2B and B2C marketers... looking for technology to support the requirements of a complex, increasingly mature content marketing program should consider Welcome.”

- ✓ **Automated Compliance Checklists:** No matter how long or complicated your governance requirements are, you can plug every single one of them into *Welcome*. And, when reviewing content, it’s easy to indicate exactly why and how it isn’t compliant; all relevant stakeholders (both internal and external) will be notified automatically.
- ✓ **Automated Workflows:** The same applies to all kinds of workflows: Set up campaigns quickly by simply hitting ‘copy’ on a winning workflow. *Welcome* will automatically progress your project and notify team members responsible for next steps.
- ✓ **Distribute Content Right from your Workflow:** Once you’re ready to publish, no need to switch to a different tool. *Welcome* can push your content to your CMS, CRM, social channels, website and more.



Gartner, Magic Quadrant for Content Marketing Platforms,
Nicole Greene, Rick LaFond, 22 March 2021

“B2B and B2C marketers...looking for technology to support the requirements of a **complex, increasingly mature content marketing program** should consider *Welcome*.”

— Gartner



Do you think *Welcome's* features would spark **'gates-of-heaven-opening'** moments for your team?

If so, you and your crew can **try *Welcome* for free** with our **Free Forever plan.**

Try for free

Welcome

About the Author



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Lisa Feierstein is a generally enthusiastic and endlessly curious writer, speaker and content expert. She helps marketers understand and (more importantly) harness trends. In her current role, Lisa drives *Welcome's* own marketing efforts to evangelize and champion software built for marketers.

Welcome

Welcome transforms how marketers run marketing. It is the leading marketing orchestration platform used by the world's most ambitious brands to strategically align teams, take the friction out of execution, and demonstrate meaningful results.

Only *Welcome* offers a platform purpose-built for the complexities of modern marketing that can scale to support the largest teams in the world. It is a new layer of the marketing technology stack where marketers can work better together, connect other martech tools, and measure performance.

For more information, visit welcomesoftware.com or contact sales@welcomesoftware.com

Welcome

One platform to run
all your marketing, better.