



EVOLVED MEDIA



# *LOOK INSIDE* The World of Tech PR



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# what's this eBook all about?

As a B2B tech content marketing agency, we get the opportunity to collaborate with some of the best PR agencies in the business. We create great content with our clients, and the PR agencies we collaborate with help find it a home. We've learned a lot of lessons over the years about how to come up with the right story, the right angle, and the right pitch for the right publication.

But as with all things in life, nothing is as simple as it seems. There is a lot going on behind the scenes when it comes to content and PR. We decided to find out what that was. This eBook gathers insights from Dan Woods' interviews with a wide variety of PR practitioners and the B2B technology clients that work with them. We wanted to share what we learned with other B2B tech marketers to make their journey a little easier.

## Acknowledgments

We want to thank all the experts who contributed to this eBook.



# What is Tech PR?



## What Does PR Mean for Tech?

Public relations is a term that covers the wild west of different types of firms doing vastly different things to help their clients. If you are a startup or a growing company, you may wonder if or when you need to use a PR firm. Let's talk about what PR means for the tech industry, and how it is different from and connected to marketing.

At the beginning, a tech company is many things. Usually, the beating heart is a technology innovation and a fundamental use case.

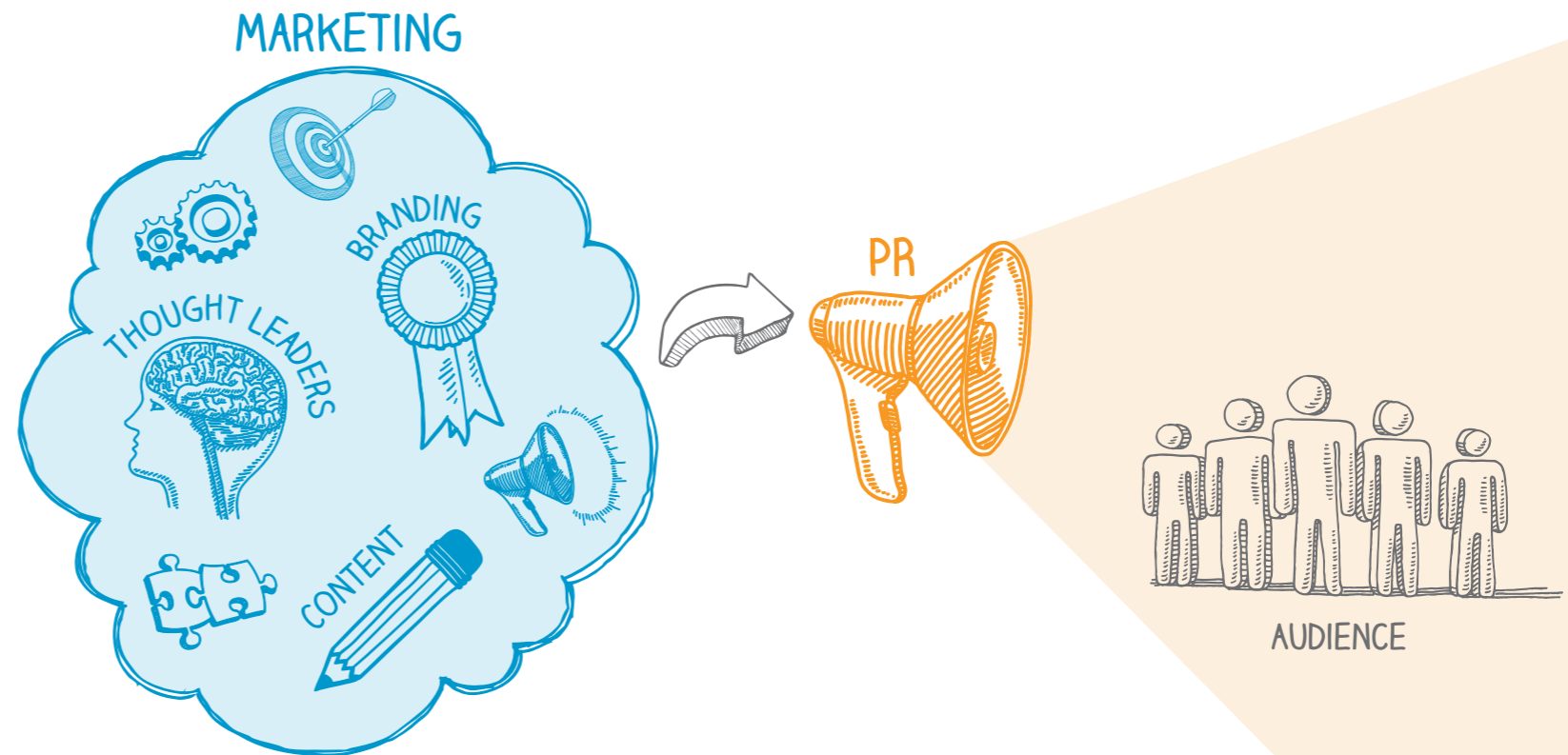
Because entrepreneurs see ahead of the market and try to solve tomorrow's problems, they often fill the role of biblical prophets, warning of change that will be disruptive, offering a prescription to save the day.

And, as more is learned, the technology changes and more use cases show up. The story is always a narrative that evolves. Once your story has matured, it's time to hire a PR agency. Are you ready?

**The fundamental goal of PR is to draw attention to your company's story. PR strives to expand awareness of your company, its products, and its use cases.**

Marketing and PR are both megaphones for telling the world about your product. Marketing prepares your message, website, content, and the mechanisms of communication to get attention. PR adapts the message to a variety of audiences.

There can be a lot of overlap between what PR agencies do, what other types of content marketing agencies like Evolved Media do, and what internal marketing departments do.



## What Does PR Mean for Tech?

PR is relevant at the end of the marketing process, which is getting the word out. If you don't have the foundation in place, a PR team goes around effectively begging for coverage. This is a waste of time and money.

PR efforts thrive when:

- The PR team has a background in your type of product or can quickly come up to speed to gain a sophisticated understanding.
- The PR team has excellent contacts in publications that serve the intended audience.
- Your company has thought leaders who will appeal to publications and other channels.
- You have marketing assets that allow editors, reporters, and bloggers to quickly come up to speed on the product and find their own angle.

Now that you understand what PR means for your company, and how it amplifies your marketing program, you can decide what type of tech PR firm is best for you. Next we'll take a look at the wild west of PR, and how to decide which type of firm is best for you.



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## Find the Right PR Match

Now let's talk about how to choose the right PR firm.

### Buyer Beware

Since there are PR degree programs at many educational institutions, and few barriers to entering the business, anyone can throw up a shingle and claim to be in PR. When it comes to choosing the right PR fit, you must know the landscape. Here are the types of firms you will encounter.

### The Lone Wolf

The lone wolf PR professional is a senior PR professional who has extensive experience at firms and decides to break out on their own. Lone wolves sell their services and execute the work themselves.

Having a senior PR professional on your account can be very powerful. The drawback with larger PR firms is that junior people are often executing the work. The senior people sell the relationship and oversee the juniors. Sometimes this works great and sometimes it doesn't. With a lone wolf, you don't have that problem. The only person doing the work is the senior person.

You should be on the lookout for two problems with the lone wolf (which also apply to all PR firms):

- ① **Over-commitment.** Sometimes a lone wolf needs to say yes to lots of clients and then gets overwhelmed by the workload. The lone wolf can either bring on junior people, or their senior peers to help. The good news is that lone wolves are usually better at managing these people than larger firms.
- ② **Fit.** One thing you are paying for with any PR firm is the value of their established relationships. Anyone who has tried to get attention from the press knows it is an uphill slog. Reporters and editors at major publications are flooded with messages from PR firms. Relationships with the press are built over time, usually by providing something of value that helps the reporter do their job. You need to assess is how well the lone wolf's relationships fit with the types of publications you want to target.

### The Boutique PR Firm

Typically boutique firms have a small handful of experienced, senior partners who are operating as a small agency. This means you will have senior people paying attention, but will likely have day-to-day contact with people who are more junior. Sometimes a boutique can be run as a collection of lone wolves, in which case you will have more senior access.



Boutique firms hold two main advantages over the lone wolf:

- › The boutique model can scale better than the lone wolf model. If you have a growing amount of PR work or want to do a lot of outreach in a short time, a boutique can usually focus resources and get more done.
- › Boutiques also usually employ individual specialists, depending on their engagement model. It is common for a boutique to have some sort of content creation capability, to support events, and to have ways to monitor and promote on social media. Lone wolves do this stuff as well, but usually aren't employing specialists.

### **The Full Service PR Firm**

A full service PR firm extends your organizational capabilities in a scalable way, using a defined process, and staffed by people specifically trained to execute that process.

A full service PR firm has a core of partners, directors, and disciplines as well as a process for serving your needs. Client relationships may be managed by mid- or senior-level people who may be assisted by juniors. The senior people manage the process and contribute as needed to add special skills.

A full service PR firm usually has service offerings that go beyond smaller firms' capabilities:

- › Investor relations
- › Corporate communications
- › Branding
- › Content marketing
- › Integrated marketing campaigns
- › International support and activities

### **Initiating the Relationship**

Most companies start out with a lone wolf or boutique and move up to a full-service firm as they grow, a process that may take many years. It is not uncommon for a company to cycle through several firms of each type.

The key trigger for hiring a PR firm is usually a positioning exercise, product or company launch. About six months or so before the launch, the head of marketing starts to look for a firm to support the launch.

The first question to ask is why you want to work with a firm. If you have the money, it is entirely possible to hire someone in-house to do the same things that a lone wolf or PR firms will do for you.





But at some point, the head of marketing looks for an outside firm because they want a higher level of skill and access to the PR firm's relationships.

The challenge then is to find a firm with the right fit. Here are some ways to help figure out the fit:

- › Ask for recent placements of articles in publications you want to get in.
- › Ask for the approach the lone wolf will take to introducing your company to their network.
- › Ask for client references, or do back door reference checks in your shared networks!
- › Assign an exercise or assignment to get a better sense of their thinking and approach.
- › Spend time together. Chemistry is key. Do you trust the people you would be working with?
- › Meet the team who will be working on your business. Understand team roles.

- › PR firms are also looking at you for a fit — does your CEO value PR?
- › Share your business goals so that PR can help fuel those goals.

### **Setting Reasonable Expectations**

An important part of vetting a PR firm is to create a mutual understanding with reasonable expectations. Remember that the marketing foundation is a crucial part of measuring the success of PR. If you have a website that directs visitors to the right story, engages them, and creates a relationship by offering content, you can measure PR success via increased attention and traffic.

It is best to have specific goals for your PR efforts. Everyone wants to get coverage in leading publications such as the Wall Street Journal and the New York Times. There is really not a sure-fire way to get such coverage. Anyone who says otherwise is not telling the truth.

In general, the goal should match your company's assets. If your company has a famous founder, investor, or client, you can expect coverage in the top publications right away. Few companies have such assets. That's why you need a firm that can distill your product offering, and marketing content to create resonant, business stories that will get picked up by the press.



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# Set Your PR Efforts Up for Success



## 6 Priorities for Your PR Journey

We're living in an era where outsourcing our lives has never been easier. From driverless cars to Amazon home delivery of almost any product we could ever need at the click of a button, it's increasingly easy to automate our existence. Yet, too often, companies approach PR in the same way — as something to turn over to someone else, as something done for the company, rather than with it. But to get the most from PR, you need to establish a strong relationship between the PR firm or consultant and the business that's being represented.

How do you build that strong foundation? As part of our continuing series about PR for tech companies, I spoke with Evan Sirof, a freelance PR expert and consultant. Sirof has a lot of experience working with companies in various stages of the PR journey. He offered up his checklist of how any business can get the most out of PR.

### Priority 1: When You Start PR, Have a Goal

Sirof emphasized a point I've heard from a lot of PR experts: when you begin PR, you must understand why you're doing it in the first place. Many companies come to PR reactively after seeing a competitor get prime coverage. As Sirof said, "Companies often think 'we need to do something too,' even if they don't know what that something should be."



This is a flawed approach. If you don't start a PR campaign by first knowing your specific goals and needs, no firm is going to be able to help you package your story skillfully. Sirof recommended that companies engage in a bit of self-analysis before embarking on PR by asking a series of questions:

- › What are you looking to promote about your company?
- › Are you promoting your company because you're trying to line it up for a transaction or a relationship?
- › Is your PR focused on a particular product because you've created something new and innovative? Or is your goal larger, like trying to define a new category in your industry? Or are you trying to separate yourself from the marketplace or become a thought leader? Or are you an established player trying to recast your story?

**In short, you need to know the why of your PR strategy before you can even develop a strategy to put in place.**

### Priority 2: Evaluate Your Strategies Based on Your Market Positioning

When you're developing your strategy, you need to know who you are and who you aren't. Companies must recognize what will be most effective given their size and industry presence. Even if you have a cutting-edge new technology that you think makes you competitive with major players, you need to understand the reach those companies have. To challenge Microsoft's cloud presence, you first need to figure out how you can position your product in a new and innovative way. Otherwise, you're David versus Goliath, but you don't even have a stone in your hand to fell the giant.

It is also essential to understand your sales pipeline. Do your potential customers recognize that they have a problem? Or do you need to provide them with basic education that helps them define it? Your customers must recognize that they have an unmet need before you can differentiate your technology as the best solution to meet that need.

### Priority 3: Have a Content Foundation in Place

PR is not possible if you don't first have a foundation of core content. Many companies think the reason they're not getting their story out is because they don't have good PR. The reality, in fact, is that they don't actually have the content to back up a campaign.

Sirof said he spends a lot of time working with companies on content. Even the slickest advertising campaign can end up being all style, no substance if you don't have white papers, videos, infographics, web pages and other core content to direct people to once you've grabbed their attention.

Sirof sees a tendency for companies to throw the kitchen sink into their PR program. They piece together a customer story here and a press release there, without a coherent strategy. The resulting PR is disjointed and random.

For Sirof, "PR is more effective when it's guided." And it's guided when you've already laid a foundation of core content. While quality PR firms can help you create content, you must create the content before doing any press outreach. "We all know the most effective campaigns are ones where you send an email with a link to a white paper or video which then starts a conversation and extends engagement," he said.



### Priority 4: Don't Treat PR as an External Thing

And here we get to one of the most pivotal pieces of advice Sirof offered: PR works best when a firm or consultant focuses as much on internal communication as it does on external outreach. When Sirof begins to work with a company, he often devotes a lot of time to internal communications. He learns how employees communicate with one another and how they think and talk about what they do. He'll often uncover serious fissures that, left unchecked would lead to a stifled PR campaign in the long-term.

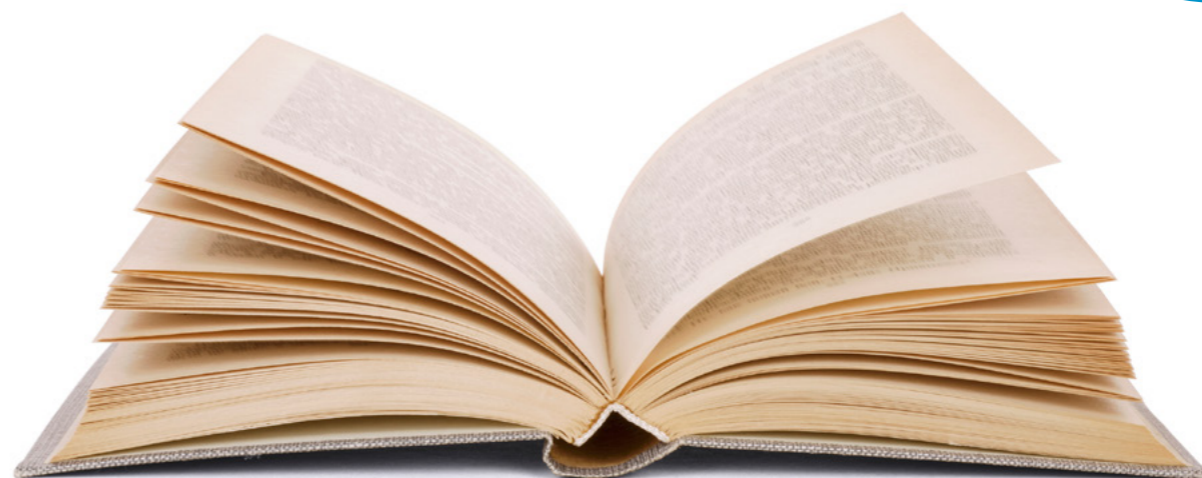
Sirof looks at every aspect of how a company communicates, from how it approaches marketing to how it presents itself. He often finds companies are looking at PR in isolation. They don't see the link between PR and company culture or branding. But for Sirof, good PR comes from good communications. And so he strives to become a part of the team. Like an embedded reporter, he meets with a wide variety of stakeholders and assesses operations from this vantage point. PR can be a launch pad toward improving communications across the entire business.

### Priority 5: Recognize that Great PR Stories Can Come from Anywhere

Part of the reason Sirof embeds himself in companies is that he finds that great PR stories can come from all lines of business. A side benefit of working on internal communications before engaging journalists is that PR works best when it's part of the entire company's internal thought processes. When everyone is thinking about how best to engage the world, PR programs have a better chance to succeed. To reach this level of success, employees at all levels of the business need to be brought into the fold.

As Sirof said, "Great stories come from everywhere." That's why letting your PR partners into the business is so important. They have the time and knowledge to find these stories, whether it's from a low-level engineer, a product manager, a secretary, or a CEO. The result is a more complete story of your business and the product, which enables a different perspective to emerge than just the official storyline put forward by executives.

PR works best when a firm or consultant focuses as much on internal communication as they do on external outreach



### Priority 6: Be Ready to Participate Yourself

PR is an integral part of anything a company does, not a separate entity. It should be ingrained in an organization's DNA. In order to integrate PR into the internal structure of the company, key staff must be prepared to participate. Executives often think that since they're outsourcing PR, they don't have to have any direct engagement. But that's a misperception — the job of your PR client is to open the doors of gatekeepers for you — but you have to be prepared to walk through and speak about your expertise yourself. After all, no one knows your product better than you do.

Sirof's checklist should come in handy for any company about to kick off their PR process. PR isn't turning the keys of your communications over to someone else — it's about a PR partner coming in and helping you improve how you communicate with each other, and then the world.

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#### **Evan Sirof**

*Founder, President, Marcomm-On-Call, Inc*

Evan Sirof has been working with innovative technology companies for more than 20 years. He is a specialist at helping companies craft compelling stories to communicate with their markets. His company, MarComm-On-Call, reflects his vision of timely, professional public relations, writing, and strategic communications services that are implemented quickly and executed for maximum effect. Evan has extensive experience in broadcast and professional video, big data, telecommunications, enterprise applications, storage, professional photography services, compliance and other technology segments.



# How to Build a Partnership with Your PR Team



## The Right Chemistry Matters: B2B Tech and PR

The old adage is that marriage takes work. Each party must navigate all of his or her competing desires. Successful relationships don't just happen — they are consciously created.

The relationships between B2B companies and PR firms operate under the same principle. PR only works if the relationship between a company and its firm is harmonious. So how can B2B companies get these relationships right? I had the chance to speak with Robin Bulanti, Principal at Kulesa Faul, Inc., a boutique PR firm with a long track record of working with B2B companies. We covered a wide range of issues that companies need to consider in order to get the most out of PR.

### Get It Right

Foremost among Bulanti's advice was to ensure that your PR strategy has the right message. You must first identify your audience and then craft messaging that appeals to that audience. Don't make your message too tailored or too broad, or you'll end up excluding potential customers. The right message will differentiate your company. It will tell the world why your product is different, avoiding "me toos" that can clump you in with your competitors. You don't want to seem like you're trying to fit in with a fad — your message should convey that you're a leader and pioneer.

### Check the Clock

If you want the most out of it, treat PR like a fine wine and give it some time to breathe. Bulanti recommends engaging with a firm well before you plan to go to market — ideally three to six months prior. Why is all this time needed?

Well, for one, you need time to create content and have your website fully built out so that when you start asking for attention, you have somewhere to direct interested eyes.

Quality content takes time and you need space to fine tune your message and ensure that you, everyone in your company, and your PR firm are all aligned around the reason you're doing PR in the first place. Bulanti cautioned against treating PR like a checkbox. If you don't have well thought out logic behind your message and strategy, you'll undercut your efforts.





### **Great Expectations — or Just Reasonable Ones**

A point of emphasis I've heard throughout my interviews with PR experts is that successful PR requires a clear goal. Bulanti stated that you have to know where you want to go as a company and how you want your PR to get you there. This holds true no matter your motivation — whether to be acquired or just to raise awareness. And when you have this knowledge, Bulanti added that it's okay to ask for a lot out of your PR. On the other hand, if you're expecting constant headlines but you don't have a coherent message, you're asking more of your firm than they can reasonably give.

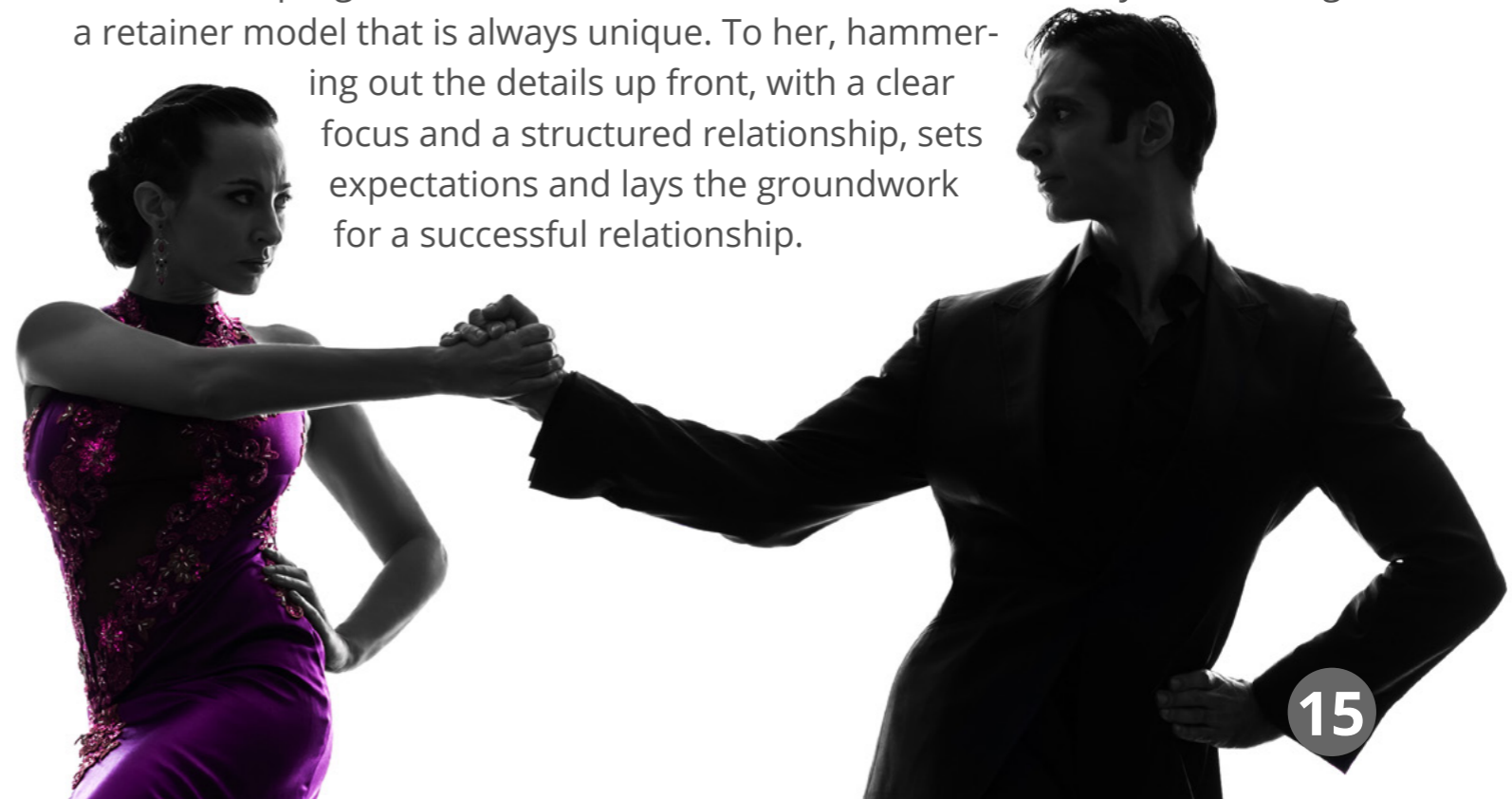
Bulanti does think it's alright to ask a firm to help build out thought leadership and marketing content, as well as your social voice and online community over time.

**But the ultimate core of your messaging must come from you**

### **Establish the Arrangements That Work Best for You**

Many B2B companies who are new to PR focus on the wrong things when selecting a firm. Bulanti made it clear that it's not about what you spend on PR — it's about the team your firm has devoted to you, regardless of the reputation and size of the agency you're working with. Companies become preoccupied with the price tag as a sign of status, rather than focusing on what they're actually trying to achieve. In many cases, for B2B businesses, a savvy freelancer might be more effective than a huge firm.

Craft the business arrangements with your PR partner that will meet your needs. While you shouldn't ask for every PR service under the sun, don't settle for a "basic" program. Bulanti believes in customization for every client, using a retainer model that is always unique. To her, hammering out the details up front, with a clear focus and a structured relationship, sets expectations and lays the groundwork for a successful relationship.



### **Chemistry over Notoriety**

Bulanti was unequivocal about the need for chemistry between companies and their PR partners. She recommends meeting with the entire team up front to determine whether the relationship will be productive. If you don't have access to senior resources at all times, you're not getting the attention you deserve. Bulanti suggests keeping track of how often you're interacting with senior leadership as a gauge for how the relationship is progressing.

### **Picture Success**

With her clients, Bulanti measures success by what they're trying to achieve. That can be the quality or quantity of the coverage, depending on the company's size, or in some cases, increased industry or publication awareness. For businesses looking to raise funding, success often means attracting funding from the right venture capitalists. For companies in launch mode, success might mean exposure to as large an audience as possible.

But how do you measure awareness? You can measure hits or search ranks. You can look at your coverage versus competitors. Or you can even track your coverage in different tiers of publications. But you should be measuring something that aligns with your ultimate objectives.



## The Biggest Mistake

Good PR comes just as much from hitting the right notes as avoiding the wrong ones. Bulanti believes the biggest PR mistake is to not know why you're doing PR to begin with. But there are a lot of other mistakes B2B companies often make. If your relationship is not strong, if you do not have trust and compatibility, you're with the wrong firm. You should also avoid choosing a firm solely on size alone — individual freelancers and small, boutique firms can be just as adept (if not more so) depending on your needs. Whoever you use should be quality storytellers intent on ensuring industry-wide awareness.

Bulanti also pointed out there's a difference between outsourcing your PR and outsourcing responsibility for your PR. You are your best defender. You should be tracking success yourself. That means using metrics for media relations, exposure, and news announcements with real time dashboards.

Finally, she had two other points I think are especially pertinent. The first is not to overlook firms just because they've never worked in your line of business. If you feel comfortable with them, if they can tell a story, you can succeed. Second, she emphasized to not try to do too much. Having a tight focus on what you're using PR for and who you want to reach out to is better strategy than trying to be everything to everyone.

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**Robin Bulanti**  
*Principal, Kulesa Faul*

As a principal of [Kulesa Faul](#), a mid-sized Silicon Valley PR agency, Bulanti works directly with clients on strategy, positioning and measurement. With 18 years in technology PR, she's helped businesses of all sizes to reach their objectives, from awareness and market leadership to acquisition or IPO. Connect with her at [robin@kulesafaul.com](mailto:robin@kulesafaul.com) or on [Twitter](#).

Don't overlook firms just because they've never worked in your line of business. If you feel comfortable with them, if they can tell a story, you can succeed

## Your Big PR Agency Is a Person Too

In the world of tech startups, there's often a suspicion of large, established firms. This makes sense — tech companies are focused on disrupting the status quo, and nothing screams status quo like a large institution.

Yet, when it comes to public relations, B2B organizations should keep an open mind about working with recognized, full-service firms. It's no accident that many of these firms have been around for a while and worked with many successful clients. While full-service PR firms do come with a few drawbacks, for savvy B2B companies that know what they want out of PR, using a large agency can be immensely beneficial.

Michelle McGlocklin, Vice President of Global Communications at Rimini Street, was kind enough to speak with me and shed light on why B2B companies should consider working with large PR firms and how they can get the most of the partnerships. Here are some of her key pieces of advice.

### Understand the Full-Service Edge

Most importantly, companies should know why it's worth considering a larger PR agency in the first place. For McGlocklin, full-service firms are most effective for clients that are seeking a high level of sophistication, are interested in leveraging a larger brain trust across different disciplines. You would also consider a larger, networked firm to leverage their international reach. Full-service firms have vast networks of contacts, as well as experienced staff. If your company can capitalize on this type of influence, a large PR firm might make sense.

### Act Local to Become Big

Another reason to contract with full-service agencies is that they often have subsidiaries or affiliations in most, if not all, key markets in the US and globally. McGlocklin noted, as you're growing awareness of your brand, being able to team up with an affiliate with insider knowledge of the market in Kansas City or Seoul, greatly increases how fast you grow. Your PR messaging should be able to hit a targeted audience, and with partners across the world, you can tailor that message to each market with help from a local expert.



### **Revel in the New**

If a B2B company contracts with a full-service firm, one thing they should not only expect, but demand, is a constant stream of fresh ideas. To McGlocklin, a quality firm can be measured by the new, innovative, and creative ideas they're able to churn out. If you're not getting this from your firm, they're failing you. Working with PR firms should be a partnership — B2B companies should not have to prod or push their agencies to give them these ideas. Full-service firms should be challenging your plans and offer recommendations at all times, aiming to stay one step ahead of you.

### **Structure the Relationship the Right Way**

Most workplaces are not a democracy for a reason — if everyone had equal say, it would be nearly impossible to make decisions and get anything done. The same holds true for your relationship with large PR firms. Though full-service firms can bring diverse networks of PR talent to your campaign, McGlocklin recommends structuring the relationship so that there is only one person ultimately in charge of your account.

That should be the person through whom all communication and activity updates are funneled. You might have work going on in the Ukraine or Singapore, but you should be getting updates on these efforts from your main point of contact.

### **Measure Your Progress**

McGlocklin echoed a theme sounded by other PR professionals I've interviewed: namely, use data and metrics to assess the success of your PR strategy. Your firm should have a way to gauge the level of engagement with every piece of content that goes out the door, including response to a call to action. Your [PR strategy](#) should include analyzing everything from where your content appears, to whether you have third parties quoting you in pieces, to whether your key messages made it into the headline or body of the coverage. Track the details to know your impact.

### **Analyze This**

An often overlooked aspect of tracking is how impactful your analyst relations engagement is, which McGlocklin says should be a key component of most B2B technology communications programs. She gave two ways to measure the success of your program with analysts:

- Did you influence the outcomes of any relevant industry reports?
- Do the key industry analysts in your field now fully grasp your unique value proposition and strategy to the point where they're referring clients to you?

If you can't affirmatively answer these questions, your strategy is not succeeding.

### What Does Success Look Like?

McGlocklin rightly pointed out that success is different for every company. Obviously, success involves meeting the original goals of the program, but success is not static. And companies should frequently re-evaluate their PR plan to do real-time course corrections. Because the tech industry evolves so rapidly, your PR strategy has to be nimble and ready for anything — from senior management changes to surprise moves from your competitors. If your firm cannot keep up with the changes, you're with the wrong firm.

### What Not to Do

When asked for recommendations on what to avoid or mistakes to look out for, McGlocklin's first point was to take note of a PR agency's attention to detail. If their internal correspondence with you is littered with errors for example, that should be a red flag about their ability to deliver quality work. She also cautioned against complacency.

**If your firm is not constantly producing or continually looking for ways to take the communications program to the next level, the program will lose steam and so will its effectiveness.**

### The Power of Teamwork

But, for McGlocklin, it's also up to the client to be an active participant in the relationship. She said that too often partnerships end up purely transactional. These relationships don't work in life, and they don't work in PR. The more you treat your agency team as an extension of your own team, the more committed to you they'll be. And that means offering up compliments when they're deserved instead of treating success as something that should come because you're paying for it.

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### Michelle McGlocklin

*VP of Global Communications, Rimini Street*

Michelle is VP of Global Communications at [Rimini Street](#), responsible for global brand awareness and external influencer communications. She has more than 20 years of B2B global technology comms experience, holding senior communications roles at companies such as Hewlett-Packard and Weber Shandwick, a leading global PR firm. Michelle is a seasoned communications change agent with a passion for leading teams through business transformations. She holds a Bachelor of Arts in Public Relations (with a minor in business) from San Jose State University, and is a graduate of the London Business School Executive Education Program.

## One Size PR Does Not Fit All for B2B Tech Marketers

Tech entrepreneurs are skilled innovators who identify the market need for the “next big thing” and then build products that address those problems. Yet, when it’s time to get their product noticed, they may not know the best way to utilize a more conventional communication strategy: namely, PR.

I spoke with Suzanne Block, Account Supervisor at Merritt Group, a PR, digital and creative firm that specializes in B2B tech PR. Our conversation highlighted a crucial issue we haven’t yet touched upon: what is the best strategy for tech companies to achieve a PR victory?

Like a coach prepping her team for a crucial game, Block recommended following a two-part strategy to win at PR.

### Strategy 1: Fit and Match

Too often, companies think all PR firms are the same. Or they choose solely based on reputation. Block emphasized that all strategic communications are not created equal. Selecting a firm with expertise in your particular field and that can meet your specific needs is crucial and is the first step in a quality communications strategy. Just as you’re able to scroll through the profiles of potential partners on a dating site, you should do your research before selecting a PR firm to ensure the right fit.

An important aspect of finding this fit is understanding what PR is meant to do — and what it’s not. Many companies assume that their work is so technical that no PR firm will understand their business or product, so they are somewhat haphazard in their selection process. Block said that if your PR firm doesn’t understand your business, you’re with the wrong firm. Domain expertise is a must for a PR partner.

At the other extreme, tech companies often have the unreasonable expectation that their communications agency should grasp the intricacies of their product as well as internal staff. As Block told me, “It’s not your agency’s job to be systems engineers.” In fact, you actually don’t want them to be.



If your PR firm is too far in the weeds of your product, it will likely compromise their ability to effectively message its benefits to the wider world. A PR firm will never know your product as intimately as you do, but, as Block put it, “What we both need to know is what your product does and what its unique value proposition is, as well as your competitors and what they’re claiming. Ideally, what we’re trying to do is find your special sauce, your special story that aligns with your product capabilities that can really help us communicate in this insightful way.”

**Being too entrenched in the details of how your product works can actually undermine the ability to communicate this differentiation effectively at a high level.**

The key thing for tech companies to remember is that PR’s main role is to translate your message for a wider audience. Tech entrepreneurs often assume that because they’ve identified a market need, everyone in the world will have the same interest in their product as they do. That isn’t the case. The reality of PR is that you’re usually communicating with people who are not interested in your product. PR’s responsibility is to make people care and make them understand why they should pay attention. They take your unique value proposition and appeal to industry and journalistic gatekeepers in a way that aligns with the larger conversations happening in the marketplace.

Thus, wanting, or even expecting your PR firm to know your product inside and out can compromise your messaging and the entire PR endeavor. Your firm should know the landscape well enough to deploy a strategy in which your product fits into the larger industry narratives swirling around you.

### **Strategy 2: Relationship Bliss**

Managing expectations for product vs. technology landscape knowledge is essential to succeeding with the second part of Block’s strategy: creating an optimal relationship with your strategic communications agency. She gave some good advice about how to know whether or not your relationship is working, telling me, “If at the end of a PR engagement you don’t know how to explain your product better than you did before, that PR engagement didn’t work.” Companies should be working toward creating a long-term relationship with their PR firm to maximize their ability to reach those key gatekeepers.





## One Size PR Does Not Fit All for B2B Tech Marketers

So what are some ways to know if your relationship is working? Well, for one, you should be excited by the vision your firm is offering. As Block said, she knows a client is on board when they “pull in their chief executives because they’re so excited by our vision.” To get to this point, there has to be a clear definition of roles on both sides. Too often, clients come up with great ideas about how to message their product, but don’t realize that those ideas have been used and are worn out. There has to be trust in the relationship when your firm course corrects when this happens.

Thus, a great vision often seems to present your product as solving a problem that is a step or two away from the actual domain it addresses. This can make some companies uncomfortable, but a good PR firm understands the journalistic world thoroughly and knows if a message will be ineffective from the get-go, no matter how carefully it’s packaged.

Block, like other communications professionals I’ve interviewed, also emphasized using data and analytics to measure campaign success. She said her firm sets metric-based goals at the beginning of the partnership and then keeps clients up to date on their progress. Having objective measures of success helps set expectations and ensure a harmonious relationship.

To reach a state of PR bliss, Block recommended creating a structured relationship. Holding a high-level meeting every six months is essential. These meetings should include all relevant stakeholders and focus on higher level strategy conversations, such as product road-mapping and assessing how the PR strategy has performed over the past six months. There must be transparency on both sides in order to establish realignment. Everyone should leave with redefined goals.

Yet even more important than these visioning meetings are more nitty-gritty meetings conducted on a weekly basis.

**Block pushes for open communication as a commitment of both parties to ensure buy-in from all stakeholders.**

The frequency of these meetings helps to bolster the relationship, but also allows PR to constantly bring new opportunities to the table. As a result, companies always know the status of their strategic communications efforts. For Block, this is the way to make sure the program is always moving forward.



### How to Know When the Relationship Isn't Working

Block also discussed the indications for when the relationship isn't working. The clearest is when the established metrics aren't being met and there's data to back that up. Another danger sign for a PR firm is when a client is not engaged in their PR strategy — then it's clear the partnership is floundering. If a company is not providing their PR firm with the resources they need or there's a lot of lag with supplying information, the campaign will suffer. Tech companies need to recognize this early or else risk wasting money on PR that goes nowhere.

But ultimately, PR is predicated on relationships — relationships between the client and PR firm and the PR firm and journalists. To chart a course to victory with PR, tech companies need to buy in with a knowledgeable partner that they trust enough to advance their message — even if the way that message is communicated is different from how they might have first conceived it. From there, just like in any relationship, transparency and open communication are key. As Block said, "Strategic communications agencies and their clients should communicate enough so there's never any mystery about what's happening." Sage advice indeed.

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#### **Suzanne Block**

*Account Supervisor, Merritt Group*

Suzanne Block is an Account Supervisor at [Merritt Group](#), a PR, digital, and creative communications agency. With a specialty in business and enterprise technology PR and communications, Suzanne works closely with clients to develop meaningful and timely campaigns that elevate visibility among key audiences and align with business objectives for the most external impact.



# How to Integrate PR with Your Marketing & Content Strategy



## Marketers Fan the Content Flame for Successful PR

Technology marketers often struggle to understand how, when, and where PR factors into their company's marketing program.

I recently spoke with Nadia Gonzalez, the Head of Marketing for [Orchard Platform](#), the leading technology and data provider for marketplace lending that helps loan originators and institutional investors connect and transact. Gonzalez has a unique perspective on how companies can leverage PR to make the most of the assets at their disposal, increase sales, and elevate their reputations as industry thought leaders.

### Timing is everything

Regardless of [which type of firm is right for the needs of your business](#), you should not hire them until your company is ready to publicly announce itself.

**The goal of PR is to bring attention to either your product or your company. To do so, your company needs a strong foundation of marketing content.**

This is the foundation of any successful PR campaign. No one is going to pay attention to your company if there's just empty space behind the curtain.

Sometimes, companies put the proverbial cart before the horse and employ a PR firm before they're ready to announce themselves to the market. To avoid falling into that camp, Gonzalez recommends that companies first assess what mode they are in. If you're in a building or stealth mode, and you're refining your product without an imminent time frame for release, it's best to wait on PR. Otherwise, you're asking a PR firm to pitch possibility rather than reality.

According to Gonzalez, PR should really only start about six months prior to a product launch. During this lead-up phase, PR should focus on planting seeds with reporters, both in terms of what the product will do and why your company is a reliable and insightful thought leader.



### **Relationships Matter**

Gonzalez and I agree that one of the most fundamental aspects of successful PR is that it is predicated on building lasting relationships. It may sound trite, but in truth, PR cannot function if reporters don't trust your company. Reporters are barraged by scores of press releases and announcements every day. They will only turn their attention to you if you have done the necessary legwork to forge bonds that extend beyond mere product promotion. As Gonzalez put it, "You have to be able to tell reporters: 'here are things we have to say to make you smarter.'"

**You need a PR firm that has existing relationships with many reporters, and that has those reporters' respect.**

PR firms should be responsible for relationship management and reporter cultivation on behalf of your company. That means knowing (and cataloguing) every

reporter who is on a beat, who has dropped off, and which bloggers will be the most receptive to certain topics. PR firms should be keeping tabs on these relationships for you so that your in-house marketing team can create content those journalists will value. The key is to have lasting relationships and to keep those relationships warm through frequent outreach at all levels. Your PR firm should not be the gatekeeper to those relationships, but rather the facilitator. Think of them as the host of a party that deftly lines up the right people with one another.



Gonzalez rightly pointed out that this should not entail companies turning over all relationship management to outside PR firms. A company should handle any incoming PR request itself and should know if and when anyone in the company is speaking with the media. Directing every incoming request to a PR firm is inefficient and can steer your business off-message. Part of your internal PR management includes managing your relationship with the PR firm itself. Gonzalez, for example, has weekly phone check-ins with Orchard's PR firm, and almost daily email follow-ups.

### **Exhibit Competence**

I mentioned this earlier, but foremost, quality PR is founded on quality content. Gonzalez emphasized this throughout our conversation. I cannot reiterate enough: captivating and educational in-house content marketing must be created before ever rolling out PR.

Reporters are looking for insider analysis, and the best PR begins by proving that your company knows what it's talking about. Begging reporters with pitches won't work.

**Marketing and PR go hand-in-hand, but this isn't a chicken or the egg scenario: the marketing must come first.**

So if you want to know how to get the most out of a PR firm, timeliness, relationship building, and project management are all crucial. But quality content must come first.

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### **Nadia Gonzalez**

*Head of Marketing, Orchard Platform*

Nadia has a track record of leading marketing teams that grow technology startups into differentiated global players. At Admeld she ran international marketing, PR, and global events — as employee 5 she also had a hand in growing the brand and company culture until its acquisition by Google in December of 2011. At Google she joined the Partner Business Solutions group where she was the lead product marketing manager for DoubleClick for Publishers (DFP). She then led North American marketing efforts for Sociomantic Labs, which was acquired by dunnhumby, a Tesco company, in April of 2014. Nadia graduated from the University of California, Berkeley where she studied Social Welfare and Business Administration. Go Bears.

## PR Needs to Be Watered with Quality Content

In many ways, social media has turned an old adage on its head: impatience now seems to be a virtue. Instant fame, or at least instant notoriety, is just a few tweets or scandalous photos away for those who want it. And there's pressure on new businesses to achieve this same type of instantaneous success. That's why it's understandable that companies that get an infusion of VC capital or are rushing to market with a product, are tempted to jump into a PR campaign immediately. But too often, this is a costly mistake. A little patience can save a lot of money in the long run.

**PR is like a plant — you have to nurture its roots in order for it to grow and prosper.**

The roots of good PR are quality content and messaging. PR is about delivering the marketing messages you've created and then tracking activity around them — it's not about creating the messages in the first place. If you don't do the foundational work first, your PR strategy won't blossom.

This section is based on a conversation I had with Christine Puccio, Director of Global ISV Business Development at Red Hat. Puccio has honed her craft through years of experience as a tech product marketing manager. Here's her advice on how to do PR the right way.

### **Build Your Own Sandcastles**

Puccio echoed a point I've heard time and time again when discussing this topic with [PR experts](#): there's no point in doing PR if you haven't created content on your own first. For PR to work, your company needs a marketing message as well as content that customers can access once the PR campaign catches their interest. And all of this needs to be done before you interview PR firms to see who would be the [best fit](#). The reason? As Puccio told me, "If you don't have your foundation in place, you're going to lower perceptions of your company in the long-run." There needs to be something behind the curtain when you pull it away.

Creating a strong content marketing foundation is essential. That means a lot of content, not just a few documents. "You don't want to be like, oh wow, they put out a press release and I can't get any information anywhere about that," Puccio said. She's spot on — put in the time to create solid marketing materials before you engage PR.

### **Know Your Limitations**

Puccio also advised that companies should only reach out to a firm for help on PR at the moment they realize they don't have the necessary skillsets in-house to accomplish their goals. Until that point, it's a waste of time, money, and energy. Be realistic about what PR can and can't do and what skills you need on your team to accomplish your goals. For instance, just about anyone can write a press release, but you know you're ready for PR when you don't have someone who can make sure that press release is read by journalists and industry leaders.



### **Fools Rush In**

Okay, so you have your content ready and you've recognized you don't have the connections you need to really make an impact. Now, the next step is to carefully analyze [which PR firm will best align to your objectives](#). Puccio has three criteria for how she analyzes PR firms.

- 1 What is their reach?** Who do they know in your line of business and how are they going to get you networked to achieve your goals?
- 2 How well positioned are they in your industry?** Subject expertise matters in PR. If you partner with a firm that's never worked in your specialty, your might find your efforts stymied. With her work in financial services, Puccio specifically uses firms that specialize in relationships in that field.
- 3 What resources do they bring for social media?** From tweets, to LinkedIn and Facebook posts, look closely at how potential PR firms have leveraged social media in the past. If they have no track record of navigating social media, do not be convinced they'll be any better in the future.

### **Data Is Your Friend**

Like others in the PR world I've spoken to, Puccio believes firmly that [tracking your PR campaign](#) is essential. She encourages companies who use PR firms to track results on their own. "You're not ready for PR if you don't have these tracking platforms in place," she said. She also said that it's okay to ask your firm to share the burden. "You should be asking if your PR agency can help with this tracking to see how effective they are," she added.

### **Don't Be a Shrinking Violet**

One critical mistake Puccio cautioned against is not standing up for what you want when working with a firm. That means getting your firm's A-team. When she works with PR firms, she always ensures she's getting the attention she deserves through weekly calls and monthly reviews in which all members of the PR firm on her account are present. Additionally, for Puccio, the team that pitches to you should be the team you'll be working with. You want to know who you're working with from the get-go to gauge whether the relationship will work.





### **Avoid the Big Mistakes**

When asked what mistakes companies should avoid, Puccio said many companies make two big mistakes when working with PR firms:

- ❶ Lack of preparation
- ❷ Lack of focus

They haven't created content before engaging a firm and they don't know what they want out of a campaign.

But she offered other cautions as well. Never assume any PR firm, no matter their reputation, knows your business. Just as you would screen a candidate you were hiring for a job, it's your responsibility to assess whether the PR firm is a good fit for your needs.

This means knowing whether you need to offer the public informational context about why your product even exists. For many tech companies, you may be producing a solution to a problem so technical that few people even are aware of it. A PR firm should help you highlight the issue and show the need.

Additionally, Puccio recommended that when choosing between firms, go with the firm you think is best for your interests, not the one that is pushed on you or that you've used before. "You need to know what's right for you," she said. Finally, she cautioned against speeding into PR to check a box rather than assessing and ensuring the relationship is right. Again, patience is key with PR.

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#### **Christine Puccio**

*Director, Global ISV Business Development at Red Hat*

Christine has over 15 years' experience in business development and corporate marketing for enterprise software and hardware technologies. She has been with Red Hat for over 6 years, and was a 2014 recipient of the Red Hat Chairman's Award. Christine is passionate about articulating the business value of complex technologies to sales, partners, and industry analysts.

## A Love Triangle Between Content, Thought Leadership and PR

In this eBook, we've examined [PR for B2B](#) from a variety of perspectives and spoken with experts in the field to get their reflections on what does and does not work.

My conversations revealed an overarching theme: The ultimate goal of PR is to raise brand and product awareness, but ideally PR represents only one of many strategies to accomplish that goal. Paid advertising and earned awareness based on thought leadership, industry reputation, and quality content should go hand in hand with your PR efforts.

To ensure your PR strategy is effective, you need to focus on reasonable expectations while demanding results.

Here are some key tenets to take your PR from strategy to success.

### **Know Your Why**

One of the biggest mistakes companies of all sizes make with PR is to start the PR process without clearly defined goals. This frequently leads to unhappiness because no one in the business has a firm grasp on the results PR is supposed to be producing.

So to know your why, a company should first identify the fundamental goal of the campaign. Is it to drive a sales pipeline? To attract prospective buyers, investors, or users? To cultivate product evangelists who spread the word about the benefits of your technology? Or if a company is in startup phase, is the aim just to create industry buzz? This is the foremost question companies need to answer before they engage PR. And they must answer it themselves — a PR firm does not know your business the way you do. You should know what you need to achieve.



### **Don't Wait Until It's Too Late**

In PR, good things do not come to those who wait. Several of the marketing experts I spoke with recounted numerous businesses that delayed beginning PR to the point where it could not be successful.

The way to avoid this mistake, especially for startup B2B companies, is to start on your PR strategy at least six months in advance of your end goal or product launch. That timeline gives you enough breathing room to sanity check your message and nurture your contacts. If you are outsourcing PR, you also need time to build a close working relationship with your firm so that your strategy is cohesive.

### **Create a Message That Stands Out**

If your message doesn't differentiate you from your competitors, it will fall flat. There are just too many other businesses, people, products, and social media outlets clamoring journalists' attention. And part of standing out is avoiding "me too" syndrome. Don't regurgitate the messages of others in your space. Ask yourself: what do you do that is entirely unique?

Once you can answer that, your PR strategy should focus on crafting a message that sounds credible and relevant. A good PR firm will help you refine your message, but they're not there to create your content. PR can be the guide, but you need to provide the map. If you do outsource your PR, your firm should also very quickly let you know if your message will stand out. It's one of the most important functions a firm can play.

### **Treat Journalists Like Humans**

Instinctively, we probably all realize that PR is predicated on relationships. You should approach and interact with journalists as humans and not just means to an end. If your PR firm isn't able to help you forge these types of relationships, it's failing you. But the role of a PR firm is to make that initial connection; it's up to you to nurture the relationship.

It's crucial to actively participate in your own PR. Don't approach PR with a transactional mindset. Journalists don't owe you anything and they're not in the business of re-running press releases. You should be providing journalists with quality content and a distinctive angle from which they benefit. Don't reach out only when you want them to promote something. Ask for their advice on your product and content. After all, they cover your field for a living; they'll have insight.



### **Startups Should Play Offense**

It's also important for startups to make people notice them, rather than waiting for attention to come. In some cases, you don't need a PR firm to do this. If you're the founder of your business, it's often more valuable for you to directly pitch journalists and outlets. And if you do use a firm, you have to be your own champion.

Good PR firms are in demand and often have many clients. You can't be the quiet kid in class and expect to be noticed. You have to ask for attention and have high expectations. You should be prepared to drive the firm to meet those expectations, rather than thinking it will just happen passively.

### **Do Your Own Metrics**

Often, PR firms tout how many pieces are written about your company instead of prioritizing top-tier publication placements. As much as 80-90% of coverage will get very little traffic, but it's the 10% in top tier publications like Forbes, The Wall Street Journal, and Wired that matter — they'll drive 90% of your future business. Being able to separate the proverbial wheat from the chaff is up to you: you should set up your own PR tracking and metric system.

**PR people are in the business of making you think you're getting good PR. You should be in the business of knowing whether that's true.**

### **Avoid Common Pitfalls**

As we already discussed, if you don't know why you're doing PR, your strategy is doomed. But part of the strategy should also be advanced preparation for when things go wrong. PR is a practice and you need to prepare for all eventualities.

Additionally, expecting too much from your firm is a common problem. You, not your PR firm, are responsible for creating content and messaging. It's PR's job to refine.

The experts I spoke with all agreed that it's best for companies to be their own best advocate — have a designated spokesperson so your message comes across from a single voice, prep before every meeting, and read journalists' work in advance of meeting them.

Finally, PR is a relationship, and as in any relationship, you need to know when to move on. If you're working with a firm and you're not getting the results you want, or you're only being connected to people who you already know, don't be afraid to cut the cord. If you're paying for PR, you deserve satisfactory results.

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# the end

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