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The Callan Way

Callan Consulting's Approach to Product Marketing Success

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Executive Summary

The Callan Way provides a framework for success in product marketing, distilled from the Callan Consulting team's more than 35 years of experience in product marketing for technology companies. It consists of seven core tenets and a five-stage methodology, offering a roadmap that guides organizations to perform product marketing initiatives effectively. These best practices are designed for product marketing projects in particular, and for broader marketing initiatives in general, to improve marketing teams' success.

The seven core tenets in the Callan Way include:

- **Start with the end game in mind.** Always start by understanding your goals and objectives, be it for an overall campaign or an individual meeting. Ensure that all activities are organized to drive to those goals.
- **Get external input/talk to customers.** There's no substitute for (or excuse for not) getting customer and prospect input to all your product marketing activities.
- **Get internal input/buy-in.** Internal audiences are also important, because they can provide valuable insights and build buy-in among your key constituencies.
- **Nail your product/market fit.** Understanding customer needs and ensuring your offerings map to them is one of the most important aspects of the product marketing role.
- **Tell the compelling story.** Create engaging narratives that resonate with your audience using storyboarding and storytelling techniques to communicate the value proposition of your product in a straightforward, well-structured, and compelling manner.
- **Go from general to specific.** Start with big picture, then move to the more granular details. This rule of thumb is applicable to specific projects, research, and content.
- **Get the details right.** Pay attention to accuracy, consistency, and professionalism in all of your materials. Small errors can undermine your credibility and impact your message.

The Callan Way also includes a practical framework for applying these principles to your product marketing projects. It involves five key stages:

- **Kickoff/internal discovery.** During this phase, you will establish project objectives, confirm the tasks and timelines plan, and align stakeholders.
- **Initial workshop.** This is a work session to brainstorm ideas, identify research needs, and make project-critical decisions. For larger, more strategic projects, it should be facilitated by a neutral, third-party facilitator.
- **Research/analysis/work phase.** This is the phase in which your team executes the planned research, analysis, content development, or other activities.
- **Readout/decision workshop.** This workshop occurs around the three-quarter point of the project and is used to share preliminary findings with stakeholders, gather feedback, and refine the final deliverable.
- **Final materials development/delivery.** Based on the output of the readout workshop, the project team finalizes the deliverables and rolls them out to the various stakeholders.

Finally, the Callan Way is not just a theoretical framework, but a proven approach that has helped countless organizations achieve marketing success. It can be applied to a wide range of product marketing activities encompassing strategy and planning, customer and market research, go-to-market motions, creation of customer-facing content, and sales enablement. Whether you adopt the Callan Way in your own product marketing team or leverage the assistance of outside experts like Callan Consulting, applying this framework can help your company gain a competitive edge, improve your team's efforts, and ultimately help you drive more impactful results.

This paper is the first in a thought leadership content series describing the Callan Way. This inaugural paper introduces the Callan Way, provides context and background, and sets the stage

for the deeper-dive content to come. This paper is not intended to be an introduction to or a comprehensive "how to" guide for product marketing. Instead, it is intended to provide Chief Marketing Officers and VPs of product marketing with concrete advice and guidelines they can apply to their ongoing marketing efforts.

Introduction: What Is the Callan Way, and Why Did We Develop It?

Our Own Unique Approach to Product Marketing

Many sales and marketing disciplines have published approaches by established practitioners intended to provide guidelines for the best ways to succeed in the market. Think Challenger for enterprise sales or account-based marketing (ABM) for marketing to individual customer accounts.

While these approaches are helpful in providing best practices and guidelines for practitioners, Callan Consulting believes the industry would benefit from having a set of approaches for excellence in product marketing, something we haven't really come across in any formalized way in our decades of practicing in the market.

To address this gap, we recently developed the Callan Way, our own unique approach to marketing in general, and product marketing in particular, which has been honed over the three and a half decades that we've been practicing marketing and leading marketing teams. We developed the Callan Way to codify the best practices that we ourselves bring to our client engagements – both so that we can formalize its use for our own internal purposes and ensure that we continue to replicate these best practices in other client projects in the future, but also so that we can communicate them more broadly for the benefit of our clients and colleagues who are themselves practitioners.

In other words, we are publishing these practices, which we believe have made us successful product marketers in our own right, with the goal of sharing them with other practitioners to use and adopt in their own product marketing teams.

A Broad Set of Best Practices, Applied to Specific Product Marketing Use Cases

The Callan Way works on two levels:

1) At its broadest, the Callan Way is a general set of principles and guidelines that can be applied to nearly any marketing project or endeavor. These consist of seven key tenets that can be helpful for any marketing project, as well as a core methodology that can be used to guide larger/more strategic product marketing projects. We will go into greater depth on both later in this paper.
2) But more specifically, the Callan Way can be applied in a more targeted manner to a wide variety of use cases in product marketing. This white paper includes a list and brief discussion of many use cases where the Callan Way can be applied, and future thought leadership content from Callan Consulting will go into greater detail about individual use cases.

What's in This Paper?

This paper is the first in a thought leadership content series to be developed by Callan Consulting, all describing the Callan Way. This inaugural paper introduces the Callan Way and describes it at its highest level, providing context and background and setting the stage for deeper dive content to come that will describe how to apply the Callan Way to individual types of product marketing projects.

This paper is not intended to be an introduction to the concept of product marketing or a "how-to" guide covering every aspect of a product marketing function. Instead it is intended to provide helpful advice and guidelines targeted toward a marketing/product marketing leadership audience with experience in and a working familiarity with core marketing fundamentals. Our goal is to provide a set of best practices that we believe are the mark of the most successful organizations and that can be overlaid on existing product marketing programs and functions. We hope you will be able to take some or all of these best practices and apply them in your own organization, and that you find this paper to be valuable.

Product Marketing Is the Hub of Your Go-to-Market Team

Successfully taking products to market and maximizing their success once in it requires a team effort involving many aspects of the organization. Ranging from sales to service and support, to product management and engineering, many teams within your company need to be on the same page, driving toward the same goal, in order to succeed in the market. Furthermore the activities of each of these teams need to be orchestrated and directed with the needs, desires, and buying behavior of the customer in mind.

This is where product marketing comes in. For technology companies, product marketing is a critical function within the marketing organization whose purpose is several-fold:

1) **Understanding customers, needs, personas, and buying behaviors.** To succeed in the market requires an understanding of the market and customers, including their needs and dynamics. Product marketing is the primary function responsible for gathering this market intelligence and distributing it to the other key organizations in the company.
2) **Orchestrating the company's overall approach to the market.** It's not enough to have a clear understanding of the market and its needs; you must then select target market segments and identify a clear path to providing a differentiated value proposition in the market. Product marketing is the core team responsible for making these target market selections and identifying the company's path to addressing market needs in a compelling, differentiated manner.
3) **Communicating the product value proposition to the market.** Once a compelling, differentiated value proposition is identified, it falls on the product marketing team to communicate that value proposition to the market. Through product and company messaging told via a variety of channels, including website, collateral, sales demos, blogs and social media, case studies, and executive speaking opportunities, it ultimately falls on product marketing to tell the compelling customer value proposition story.
4) **Enabling the sales organization to succeed.** Finally, product marketing is often responsible for ensuring that the sales organization has the proper tools, knowledge, and training to be successful in competitive sales engagements. Through battlecards, playbooks, demo scripts, call decks, ROI tools, and FAQs, product marketing needs to provide the sales team with the means to ask appropriate discovery questions, communicate the company's product value proposition, and overcome objections.

To make all this happen, product marketing needs to work with every other team within the organization that has responsibility for some aspect of the company's go-to-market efforts. This includes the sales organization, revenue/field marketing, service and support, product management, senior executives, and the customers themselves (Figure 1).

Figure 1 – Product Marketing Sits at the Hub

Source: Callan Consulting, 2024

Not every company – especially smaller, earlier-stage companies – may have a named product marketing organization. That said, every company needs to address the issues and challenges that fit into product marketing teams' purviews. Sometimes these rest with other teams within marketing, sometimes within product management, or sometimes senior executives make these decisions. Regardless of where this function lives, though, the Callan Way applies to those teams that have the responsibility for the issues addressed by the product marketing role described here.

The Callan Way Overview

The Callan Way is organized along three primary dimensions:

- **Seven tenets:** These tenets consist of a set of overall approaches and best practices that should be applied to any aspect of product marketing.
- **Methodology:** This is a broad-based, stepwise methodology that provides the template for conducting product marketing projects. It is particularly applicable for larger, more strategic product marketing projects.
- **Use cases:** The Callan Way can be applied to a wide range of use cases in product marketing. We list a number of them and group them into five primary categories.

Each of these three dimensions will be discussed in more detail below

The Seven Key Tenets of the Callan Way

The seven key tenets are the heart of the Callan Way. They consist of seven best practices that have emerged over the 35-plus years we have been practicing product marketing and that we have come to realize are the keys to success in our product marketing projects. The seven key tenets (Figure 2) are:

- Start with the end game in mind
- Get external input/talk to your customers

- Get internal input/buy-in
- Nail your product/market fit
- Tell the compelling story
- Go from general to specific
- Get the details right

Figure 2 – The Callan Way: Seven Key Tenets

GET THE DETAILS RIGHT

GO FROM GENERAL TO SPECIFIC

TELL THE COMPELLING STORY

NAIL YOUR PRODUCT/ MARKET FIT

GET INTERNAL INPUT/BUY-IN

GET EXTERNAL INPUT (TALK TO CUSTOMERS)

START WITH THE END GAME IN MIND

Source: Callan Consulting, 2024

Note that these tenets are arranged deliberately: moving from the most foundational items on the bottom (starting with the end game in mind), to the more tactical items on top (getting the details right). While each tenet is important, the more strategic, bigger-picture ones are those on the bottom. They are also the ones you are more likely to encounter at earlier stages of the project, while the ones on the top generally become more important later in the game.

Let's take a more detailed look at each tenet.

Start with the End Game in Mind

This is the first and most foundational tenet, the one that underpins everything else. It involves understanding and clearly articulating the project's objectives and building your plan accordingly. This is the tenet that we would single out as the most important of the seven.

The analogy we use is shooting an arrow at a target. If you understand where the target is and where the bullseye is within that target, then you can aim your arrows accordingly. While every arrow may not hit the center of the bullseye (i.e., every product marketing initiative may not achieve the core objectives), at least you are pointing in the right direction and directing your efforts

accordingly. You may not hit the bullseye every time, but you're going to hit it a lot more often than if you randomly spray your arrows in various directions.

This advice may seem simple, but Callan Consulting is constantly amazed at how frequently clients and colleagues of ours simply launch into plans of action without taking the time to ensure that they have a firm grasp of what they are trying to achieve. As a result, all too often their plans are poorly constructed and the activities associated with them go off in the wrong direction and prove to have been a waste of the company's resources.

Starting with the end game in mind is applicable for nearly any activity a product marketing team may come across. It can be applied to activities large and small, ranging from individual meetings to product marketing plans and campaigns, to your business goals and strategy, or even your career goals. Regardless of the task, it is always important to articulate the goals and objectives and then build your action plan accordingly.

Let's consider a few examples, starting at a small scale and then broadening it out:

- **Customer-facing white paper.** Let's suppose you're creating a piece of customer-facing content such as a long-form white paper. The best approach is to start out by understanding and getting agreement on the purpose of the paper, how it fits into your larger term initiatives, who the audience is, and what you want them to do once they have read it. Goals could range from increasing awareness of your company's offerings to establishing your company as a thought leader in its space, to getting the reader to take specific actions such as visiting your website or contacting a sales representative for more information. While this may sound obvious as you read this, we have certainly seen many pieces of collateral that are written without a clear objective. The result is content that is not written in a targeted, directed manner and that lacks a clear call to action, undermining its effectiveness in the company's broader marketing scheme.
- **Product and feature development.** Callan Consulting has come across multiple instances of clients that have developed and launched products into new market segments without sufficient market input or even a clear strategy of how the new features and offerings fit into their portfolio or will add value to their customers. We have even encountered companies that have made M&A acquisitions without a clear understanding of how the new products would fit into and enhance their overall value proposition. By starting with the overall objectives and goals of the organization and working backward, a strong product marketing organization can bring customer information to the table and help ensure the company is developing the right products.
- **Company's marketing goals.** Of course, the same best practice applies to your company's overall marketing efforts as well. Having a well thought out set of marketing goals and knowing how they play into the company's broader goals and strategy is critical to the success of a marketing organization. It will enable you to build more appropriate, targeted plans and to use your team's resources more effectively. Different companies can have different marketing goals, such as establishing and extending leadership in a particular segment, creating a new product category and becoming the recognized category leader, or becoming the market share leader within particular market segments. Your strategy may be to be an effective a fast-follower, yielding customers at a lower price, lower margin, and lower acquisition cost than your more-established competitors. Or it may be to enter new geographies or channels, or to launch new offerings that open new sources of revenue for your company.

> **_Applicable Even to Day-to-Day Meetings_**
>
> _We've been in far too many meetings where the meeting organizer shows up cold, without a clear meeting objective or agenda in mind. The resulting meeting can be very disorganized, an inordinate amount of time can be spent trying to establish the reason everyone is together, and things can quickly get off track. The far superior approach is for the meeting organizer to think through what the team needs to accomplish and to state the meeting's goals up front when the meeting is called, then use those stated goals to keep the meeting topics on track and ensure the meeting accomplishes what was intended._

Get External Input: Talk to Customers

The next tenet, and one that goes hand-in-hand with keeping the end game in mind, has to do with getting an outside-in view of the market. To do this, there is no substitute for talking with customers and potential customers. When we think about the most successful companies we have worked with, the one common denominator is their degree of customer focus, even customer obsession. Starting with the customer and their needs first, and always keeping it at the center, is one of the best ways to ensure that you're starting with the end game in mind.

It continues to amaze us how little time many product marketing teams spend gathering customer and potential customer input when making key product launch, messaging, and positioning decisions. Doing this is effectively flying blind and hoping for the best. If starting with the end game in mind comes down to understanding where the center of your target is, the analogy for getting external input is conducting a careful scan to spot that target and identify the bullseye.

Getting external input can take a variety of forms. Some of the main ones include:

- **Qualitative customer and potential customer input.** The gold standard, for which there is no substitute, is to speak directly with customers and potential customer prospects. Doing this using qualitative methods such as focus groups, in-depth interviews, or newer techniques like online QualBoards will allow you to gather foundational knowledge necessary to succeed at targeting your ideal customers. Qualitative research, conducted by a skilled interviewer/moderator, can let you get beyond the "what" to understand the "how" and, most importantly, the "why." It's best to do qualitative research as your initial foray into understanding your customers, because it allows you to get the biggest picture input; ask more general, exploratory questions; go deeper on "aha" moments with on-the-fly probing follow-on questions; and test out questions to use in subsequent quantitative research. If you can only do one type of research to gain external/customer input and insights, qualitative research is the one to use.
- **Quantitative customer studies.** Even as qualitative input is the most foundational and probably the best single source of customer input, it still has its limits. It won't give you results with any degree of statistical significance, so you won't be able to say with a great deal of precision what percent of customers think or act a certain way. To get this type of input requires quantitative research – that is, quantitative surveys. These are typically delivered using a web-based methodology and consist of closed-ended questions asked in a highly structured way of many customers and potential customer prospects. For important/strategic decisions requiring a firm understanding of customer preferences, such as understanding specific customer needs when creating your new product roadmap or building the case for your thought leadership story, quantitative studies work well.
- **Talking to your channel and other partners.** It's possible to build a view of what's happening in the minds of customers via other means, such as talking to the people on the front lines with customers, which can include your sales channel and other partners. The advantage of this method is that it can be faster and cheaper than lining up customer

interviews or conducting a large-scale study, but the disadvantage is that views are filtered through your channel/partner reps, and those reps may not have a complete view of the questions you need to address. Their input may also be influenced by their own hot-button issues, which may crowd out other important customer issues. This form of research is recommended only for less-critical, quicker-turn questions and initiatives for which input needs to be gathered relatively quickly and on a limited budget, or where the initiative has to do with channel or partner marketing.

- **Secondary research.** Secondary research, or relying on published reports via online or other sources, can also play a role in gathering external input, but it also has its limits. If you are lucky, you may be able to tap into already-conducted research that addresses exactly what you are looking for, which could save you significant time and budget. Secondary research may enable you to obtain market sizing and forecast estimates that could otherwise be difficult or expensive for you to determine on your own. On the other hand, with secondary sources, you are limited to the research conducted by other parties, which may not exactly address the questions you need answers to. Typical sources of secondary research include industry analyst firms such as IDC, Gartner, or Forrester; tracking firms such as G2; consulting firms such as McKinsey or Deloitte; government-published data; or other data available via web search. Some secondary data may be obtainable free of charge, while other reports may be behind a gated firewall and can be relatively expensive. But most importantly, you should also be conscious of the source of the data and consider whether it may have any bias in it and/or how credible it likely is.

Gathering input can be done using in-house or outsourced resources. If the project is relatively small and tactical, and your in-house team has sufficient bandwidth, you may be able to simply interview a few customers directly, or run a quick and dirty survey to get some quantitative input. However, in our experience performing this type of research is usually better done using a professional research vendor for a variety of reasons. In-house teams are often so busy with the rest of their workloads that this ends up falling off the radar screen, and months can go by without results. While you can talk to your own internal customers, recruiting and speaking with non-customer decision makers is something you'll need to outsource anyway. And, most importantly, we find that most internal teams have a stake in the outcome of the interviews, with can subtly affect the way the interview is conducted. Using an impartial, third-party firm to perform the research ensures an unbiased, more reliable set of input.

> **Don't Make the Mistake of Speaking ONLY to Customers**
>
> *One key reason this tenet is labeled "Get External Input" and not "Talk to Customers" is that if you restrict yourself to getting input only from actual customers, you could be risking getting only part of the story. Suppose you are about to initiate a customer journey research project to understand how customers go about purchasing products or services like yours. You may risk running into what economists call the survivorship bias, in which you make the mistake of concentrating only on the customers that passed a selection process while ignoring those who did not. Said differently, your customers may be structurally different from the rest of the market. Because they purchased from you in a certain way, if you study only your customers it will appear that all customers in the market purchase that way.*
>
> *For example, let's say your company pursues a product-led growth strategy in which you allow customers to sign up for free trials then upgrade at the end of the trial, through the product itself. In this case, conducting a customer journey study in which you only looked at existing customers would reveal that all customers prefer a try-before-you-buy approach to purchasing products. But this may not be the case at all. It may be that only 30 percent of the market prefers a PLG approach (and you may have 80 percent of those customers), with the remaining 70 percent preferring to purchase directly from a vendor. In this case, your customer journey study would imply that your best approach would be to continue to pursue a PLG strategy, while in reality you could be running up against the limit of what that strategy will support and missing out on the lion's share of the potential growth opportunity.*

Get Internal Input and Buy-In

While it's critical to get external customer input to do a great job at product marketing, you shouldn't overlook the importance of getting input from your internal teams as well. There are three primary reasons why you should get input from your internal audiences:

- **Some teams are close to customers/have insights into customer needs.** Some internal teams, like your sales reps and/or customer service/success reps, may have direct lines into customers and their needs and challenges, and they may be in a good position to translate customer insights to the needs of your product marketing team. It may be faster and easier to line up conversations with your sales and customer service teams than to line up customers, and in fact it's often good to start by talking to internal customer-facing audiences prior to speaking with customers. This way, you can build a basic understanding of customer needs so that you can optimize the precious time you have speaking with customers.
- **Internal teams can provide strategic direction to your project.** You'll need to have clear communication with executives and decision makers who have some level of stakeholdership over your project. This could consist of product management, sales, finance, senior executives, service delivery teams, or development teams. They can help sharpen the goals and expectations for your project, provide key input and advice before you get started, and help steer your project as it gets underway.
- **It's critical to gain alignment and get your key stakeholders on the same page.** The third primary reason to speak with internal audiences is to get all your internal stakeholder audiences on the same page and align them with the task at hand. In our experience, if the product marketing team has five different sets of internal stakeholders, you will have five different points of view on the project. And while these stakeholders may believe they are in alignment around your initiative, chances are there may be several important gaps and blind spots. It is by far better to hash out, identify, and iron out these gaps at the outset of the project rather than at the later stages when you are, say, building out your deliverables and only then discover that the deliverables you're creating don't match some of your key constituents' expectations. This can be especially important in founder-led organizations or when you believe C-suite or senior management will want to chime in.

Note that while conversations with customer-facing internal audiences like sales and customer service teams are a good way to supplement the learnings you get from talking to customers and prospects, they are not a substitute for speaking with them directly. There are a number of reasons for this, including the fact that customers simply have deeper insights than your internal audiences, and sales and customer service teams may get fixated on whatever hot button issues they are currently wrestling with and other customer insights may be drowned out as a result.

> ***The Magic of Using Facilitated Workshops to Get Team Alignment***
>
> *When working with clients on large, strategic projects, we find there is no better way to build alignment than by conducting facilitated work sessions, be they physical or virtual, in which everyone gets together and talks through the project, aligning on goals, objectives, and path forward. We often come across clients who feel they are too busy, or it's too much work to get their key stakeholders in a room together, and far too many major product marketing projects get kicked off without appropriate stakeholder input.*
>
> *On the other hand, when we do work with clients that start a major project with a facilitated kickoff work session, they invariably find that it's time well invested. You may be aware of the rule of thumb that it takes 10 percent of the effort to fix a problem in the early stages of a process than it takes to fix it after the work is done. The same concept applies here. It's easier and far less disruptive to invest a bit of the team's time and energies into building alignment up front than to discover that teams are working at cross purposes further down the line, when the product is about to be launched, the content is about to be released, or the campaign is on its way to market.*

Nail Your Product/Market Fit

Understanding your customers' needs and ensuring that your company's offerings and go-to-market motions meet them is the most important role of marketing in general, and of product marketing in particular. You need to not only build a complete understanding of your customers' wants and needs, but also ensure that what you are offering and the means by which you offer it matches your customers' needs and preferred method of purchase.

It may be tempting to believe that the product/market fit decision is something that needs to be made once at a high level, and then it's done. In reality, however, the product/market fit conversation is an ongoing one, during which decisions need to be continually visited and tweaked. Technologies change, customer technology stacks change, and new needs emerge, all of which means companies need to constantly refresh their understanding of customers' wants and needs and ensure that they are delivering compelling, differentiated, value-added offerings.

Further, ensuring product/market fit is important to perform not only at the broadest level of the company's primary service offerings, but also on a more targeted, tactical basis in areas that permeate product marketing. A few examples of more tactical areas in which product marketing needs to focus on ensuring the right product/market fit include:

- **Company messaging and positioning.** This may seem like an obvious example, but we have seen too many companies who do a poor job of nailing their company messaging and positioning. When developing your overall company messaging, you need to first build a solid understanding of your target customer segments and what appeals to those customers. You need to tell your story in their language in a clear and compelling way that addresses their needs and feels comfortable to them. Unfortunately, too many technology vendors fall into the trap of speaking "to themselves," using their own internal shorthand, and the resulting

messaging and positioning comes out as gibberish to the very customers they are attempting to influence.

- **Individual pieces of customer-facing collateral such as white papers or web content.** Even if your overall company messaging and positioning successfully nails the product/market fit, you need to ensure that every piece of messaging and collateral also does. Writing compelling customer-facing content requires understanding needs for that particular piece, which may have different nuances from your company's overall messaging.
- **Sales enablement.** The need to nail the product/market fit goes beyond customer-facing content to internal-facing content as well. When developing content such as playbooks, battlecards, and first-call decks, you need to ensure that the material really communicates your offerings' ability to address your customers' needs. Since the sales reps are on the front line and are speaking with actual prospects in competitive sales situations, their materials need to be developed using a real-world understanding those needs, and must provide a clear, compelling description of how your offerings address them.

For this tenet, both product marketing and product management play a role. Product management is the function most responsible for influencing the product and its direction, and product management spends a great deal of energy understanding customers' wants and needs and building offerings that will meet those needs. But product marketing plays a vital role as well. Product marketing is the eyes and ears of the company, with the primary responsibility for understanding customer needs and feeding that understanding to other groups in the company, including product management. Product management is the internal consumer of this information, while product marketing is the team on the front lines listening to customers and conducting customer needs studies.

> ***Performing Market Opportunity Assessments (MOAs)***
>
> *The first step to ensuring that you have a good product/market fit is defining and understanding the market segment(s) your company serves. And one of the first steps to understanding customer segmentation is to perform a market opportunity assessment (MOA). The MOA leverages a combination of qualitative and quantitative research to understand the size and segmentation of different market segments and characterize customers in those segments, identifying ideal customer profiles (ICPs) and key personas within those customers. It also articulates the wants and needs and buying behavior within each of those segments.*
>
> *A good MOA will use a combination of available secondary data (for example, leveraging the market sizing, segmentation, and forecasting available from a firm such as IDC, Gartner, or Forrester), qualitative assessments of customers and their needs through primary qualitative research studies such as in-depth interviews, focus groups, or QualBoards, and, ideally, a quantitative understanding of customers' issues and challenges by segment, likely built through primary quantitative studies. The MOA will then identify and prioritize best-fit segments for your company and inform new/additional entries to your product to address identified market needs.*

Tell the Compelling Story

Once you understand your customers and their needs and have a good handle on your product/market fit, it's time to tell the customers your story. Central to the product marketing function is communicating product benefits to the market in a crisp, clear, compelling manner. This is often easier said than done, and it's easy for product marketing teams to get lost in a highly technical, complex story. Companies often like to add "just one more" bit of information to their overall story, which ends up bogging down the message and ends up confusing the customer. We

call this the Christmas Tree Effect; it's easy and tempting to keep adding just one more ornament to the tree – until the tree falls over under the weight.

To craft a compelling story, it must be:

- **Straightforward and clear.** Customers are busy and have limited attention spans, and they have a lot of content they are expected to digest and react to. One of the important aspects of a well-constructed, compelling story is to make it easy on your reader, to cut through the clutter and clearly articulate the bottom line that they need to know.
- **Well-structured.** This is a big problem with many companies' communication. One of the best ways to generate clear, compelling content is to apply a straightforward, understandable structure that the reader expects. A good content structure for a white paper, say, starts by laying out the background or context; articulating the problems, needs, or challenges the audience is facing; describing the company's product and its value proposition; providing proof points, hopefully including testimonials or the experience of other similar customers; and then applying a call to action.
- **Well written.** This may also sound obvious, but we run into far too many people who claim to be professional writers but struggle to produce top-notch, high-quality writing. Your content reflects your company; you need to ensure that it is written clearly, succinctly, with good grammar, and with appropriate tone and style.
- **For the audience.** Different audiences use different language and have different things in mind when it comes to your products or services. This could include different personas within an organization (CFOs will have a different point of view and must be spoken to differently from heads of manufacturing), or different segments (oil and gas companies have a different set of needs and regulations than healthcare companies). Your content must be developed with your audience, its needs, and the right way to speak to it in mind. And you may require different pieces of content for different audiences.
- **Witten with a purpose/call to action.** Every product marketing piece you create, almost without exception, should be written for a specific purpose and should drive the reader to some sort of call to action. A good piece of content will be unapologetic about its purpose and will articulate its call to action in a clear, straightforward manner. Depending on the content, the call to action could be as general as pointing the reader toward resources to learn more (which may be more appropriate for top-of-funnel content), or as specific as encouraging them to fill out a web form to and contact a sales rep (which might be more appropriate for mid-funnel content).

> *Storyboarding and Storytelling for Success*
>
> *Callan Consulting has been using the storyboarding technique for decades and considers it to be the foundation on which it builds its content framework. Applied to slides and sales decks in particular, storyboarding is a way to ensure both that each individual slide has a key takeaway and that this takeaway is told in a compelling way. When the slide titles (with each slide's takeaway) are read together, they tell a specific, compelling story from beginning to end. And while developed and used primarily with slides, storyboarding principles can be applied to long-form content such as white papers as well. We apply storyboarding and the related discipline of storytelling to every piece of content we create for our customers, and we always recommend our clients use these techniques to tell their stories in the most compelling way possible.*

Go from General to Specific

We are getting to some of the more tactical of the seven tenets, but even though this one is more tactical, it is nevertheless extremely important and is applicable in a broad number of contexts.

Whether you're operating at a big-picture, strategic level, like building an overall understanding of a new market segment, or at a very in-the-weeds level, like developing a piece of content or an interview guide, it's always better to start with the higher-level, general view and then get more specific.

A few examples include:

- **Target market understanding and selection.** Let's suppose you've had some success in the market selling your solution in a horizontally based manner. You decided to start going after key verticals, and you need to build a process to select the right verticals as quickly and efficiently as possible. In this case, we would recommend a phase-gate knockout selection process, starting with a broad-based understanding of many segments, based on a limited amount of research such as secondary research and internal gut-checks, to gain a more general sense and eliminate the least-likely segments with a minimal amount of work. Once you have identified the top, say, four or five segments, you can do a deeper dive into each, using primary research to get a more specific sense of their needs and fit with your company's differentiated value proposition.
- **Research techniques.** Almost without exception, Callan Consulting believes it's important to conduct any research project by starting with more general topics and questions and then moving on to more specific, granular questions. For this reason, we almost always recommend a quali-quant methodology, in which the qualitative phase allows you to ask general, open-ended questions to build a high-level picture of your customers and their requirements, and then the quantitative research phase helps you build a more granular understanding of what you learned during the qualitative research (see call-out).
- **Interviews and interview guides.** When you're talking to customers, conducting interviews, or doing any other information gathering, it is always best to start with your more general lines of inquiry and then get into more specific, tactical issues. Starting with the more general questions is more comfortable for your respondents, since they get to provide context before answering more granular questions. It also gives you the opportunity to gain important learnings, because starting with broad, open-ended questions can easily yield surprises and aha moments (that you can later dig into in your more specific follow-up questions).
- **Content development and delivery.** When creating content or telling a story, it's good to set the broader context first. This anchors your reader and sets them up to understand your argument. Then, having established that context, you are now in a position to get down to brass tacks.

Avoiding Research Blind Spots Using Quali/Quant Methodology

One of our favorite examples of the importance of applying the general to specific rule came when we performed a customer research study for an IT infrastructure management company. Our client wanted a survey to build a quantitative understanding of its customers and their IT infrastructure management needs, but working with us, they agreed to begin with a series of qualitative focus groups to build a more general understanding of customers' needs before launching into the quantitative survey.

Our client's solutions relied on agents embedded in their customers' IT infrastructure to measure network throughput, identify bottlenecks, understand application uptime, determine mean time to repair, and create other system-health outputs, all of which were gathered up in dashboards and other sophisticated management tools. Had we gone straight to a quantitative study, our survey would have been chock full of specific questions about the importance of these sophisticated infrastructure management techniques and customers' use of them.

But beginning with qualitative focus groups gave us the opportunity to ask general questions first and listen – really listen – to the answers. We started by asking our room full of CIOs and other IT decision makers, "How do you track the health of your systems and your users' satisfaction with their application responsiveness?" Expecting to hear them launch into talk about management dashboards and sophisticated measurement tools and techniques, our client was surprised to hear that across the board, the CIOs relied primarily on the degree of traffic coming in to their IT help desk – the less squawking the better – as well as user satisfaction surveys. While they did use IT infrastructure management tools, the other two metrics were the primary ones they paid attention to.

Our client was thrilled to gain this insight. They realized they had been exercising tunnel-vision and had completely missed the forest for the trees. Not only did this revelation influence the shape of the quantitative research (in which we asked about monitoring the IT helpdesk and user satisfaction studies, which did, in fact, come in at the number 1 and number 2 methods of monitoring IT infrastructure health), but it completely changed their go-to-market messaging and positioning as well. Instead of coming to market with a story along the lines of "we have more IT management features/functions valued by customers" their messaging was that "relying on helpdesk complaints and user satisfaction surveys to assess your IT infrastructure's performance is a backward-looking approach and can leave you flat-footed; instead, use our sophisticated tools to discover and rectify issues before they become user-facing problems."

This was a higher-level, bigger-picture, and more compelling messaging than they would have come to market with otherwise, and their launch was more successful as a result. Had we not applied the general to specific research approach and asked the question in a general way with qualitative research, we would have missed this insight entirely, and the entire shape of their go-to-market motion would have suffered as a result.

Get the Details Right

This may be one of the most yawn-inducing of the seven tenets (admit it, you had to stifle a yawn), but it is nevertheless incredibly important. Details matter. They send a subtle signal about the professionalism of your organization and your solution. Sometimes details are the first thing that a customer/audience notices, and getting a single word wrong can stand out like a sore thumb. Your sales deck, for example, could have a wealth of high-quality content supporting a compelling story, but a huge misspelling on an opening slide title can send the signal that your organization is not ready for prime time and can undermine everything else in your story.

Here is a small subset of details to get right in your content and written deliverables:

- **Spelling.** Run your material through a spell check, and have a second set of eyes, preferably a professional proofreader, read and correct every piece before it goes out the door.
- **Grammar.** Be careful of subject-verb agreement, parallel construction, and all the other things you learned in high school grammar class. That professional proofreader should really earn her or his keep here.
- **Alignment.** In slides, make sure that all graphics are well aligned and that nothing "jumps around" from slide to slide.
- **Capitalization.** Choose a convention and adhere to it. Callan Consulting uses title case on its slides, as defined by the *Chicago Manual of Style,* but you can use AP, the *New York Times,* or any other convention, as long as you adhere to it.
- **Colors.** Think about how you're using colors in your materials, and establish conventions and stick to them. Colors convey meaning, so if you use that pastel orange to indicate a specific market segment on page 2 of your deck, you may want to use that same orange on later slides to reinforce to the reader that you are focusing on that segment.
- **Consistency.** It's not terribly important which conventions you use for slide titles, subheads, and bullets, but you should be consistent in how you apply them. If bullet points on some slides are capitalized but not on others, that undermines the professionalism of your content.

Some of the tactics you can use to get the details right include:

- **Use templates and guidelines.** One of the best things you can do is establish clear content guidelines and templates for your team to use. Having a content "shell" that provides a professional appearance can go a long way toward establishing a compelling look while reducing the burden on your content developers.
- **Benchmark competitively.** See what other companies and competitors do in situations like yours. And you don't have to limit yourself to direct competitors. Look at how leaders like McKinsey or Apple or the *New York Times* choose to convey their content. You may get some good ideas.
- **Staff well.** We cannot stress this one enough. It's hard to get the details right when you don't have a team of A-quality players creating it. A lot of getting the details right is stuff that goes without saying or you'll know it when you see it, and a high-quality team applying common sense should be able to address or eliminate 80 percent of the problem.
- **Have someone (else) perform proofreading.** No matter how many times your writer/content developer goes through and rereads his or her work, there are likely to be errors that will sneak by unnoticed. Having a second set of eyes perform a quality control pass, both for the core content and story but also to catch the little errors, will go a long way. And while it's important to have a professional proofreader look at materials to catch grammatical and spelling mistakes, it's also important to have a second subject matter expert review each piece for content catches and changes.
- **Leverage automated tools to make your team more efficient and effective.** From spellcheck to generative AI, marketers have a variety of tools at their disposal to help them not only generate superior content faster, but also ensure quality in the output. Make sure you are leveraging all the capabilities in your marketing stack to buttress your team's quality control efforts.

Marketing Blunders and Embarrassments

We decided to have a little fun and do some online research to find instances in which commercial companies – with professional writing and copy-editing teams – failed to get important details right before their messaging made it to market. A quick web scan yielded the following:
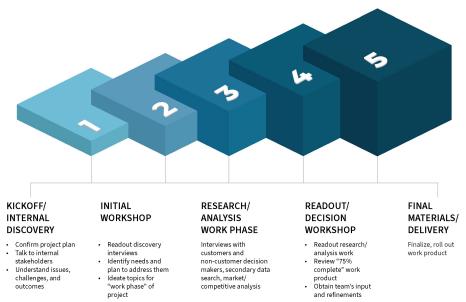
- Old Navy put out a shirt promoting the Michigan Wolverines with the message "Lets Go!! M Blue." We wonder how much ink they saved by sparing the apostrophe.
- H&M launched a shirt reading "Genious is one percent inspiration and ninety nine percent perspiration". What a genius tag line!
- Miller Genuine Draft sponsored a billboard with the tagline "A tasty contraditcion." Which doesn't sound like good diction to us.
- South Bend, Indiana, released a billboard campaign touting the "15 best things about our pubic schools." This one is probably left best without comment.
- Creative Kids Software had point-of-sale advertising reading "So Fun, They Won't Even Know Their Learning." I guess the marketing team should have spent more time on *their* learning.
- And the urban myth that was too good to be true: the Chevy Nova was rumored not to have good sales numbers when it was launched in Mexico thanks to its name. But as it turns out *nova* does not mean "doesn't go" (instead, you need to insert a space between *no* and *va*). In Spanish, *nova* means the same as it does in English. And the Chevy Nova? It actually sold well in both Mexico and Venezuela.

Sources: https://blog.hubspot.com/marketing/spelling-grammar-mistakes
https://mascola.com/blog/intentional-spelling-errors-in-advertising/
https://www.impactplus.com/blog/15-big-brand-grammar-mistakes-marketing-advertisements
https://www.npr.org/2011/10/19/141473384/letters-the-myth-of-the-chevy-nova

The Callan Way Methodology

Callan Consulting has developed a five-stage methodology it applies to the majority of our product marketing projects, or at least the largest and most strategic projects (Figure 3).

Figure 3 – The Five-Stage Methodology

KICKOFF/ INTERNAL DISCOVERY	INITIAL WORKSHOP	RESEARCH/ ANALYSIS WORK PHASE	READOUT/ DECISION WORKSHOP	FINAL MATERIALS/ DELIVERY
• Confirm project plan • Talk to internal stakeholders • Understand issues, challenges, and outcomes	• Readout discovery interviews • Identify needs and plan to address them • Ideate topics for "work phase" of project	Interviews with customers and non-customer decision makers, secondary data search, market/ competitive analysis	• Readout research/ analysis work • Review "75% complete" work product • Obtain team's input and refinements	Finalize, roll out work product

Source: Callan Consulting, 2024

While this methodology is the one we use for our largest product marketing projects, it can be applied to any strategic product marketing initiative. This methodology consists of five stages:

- **Kickoff/internal discovery.** Any project should start with a kickoff, during which you should confirm and calibrate project objectives (helping ensure that you are starting with the end game in mind), walk through the tasks and timelines plan, and identify key action items and next steps. This is often followed by some sort of discovery phase, which could consist of internal subject-matter interviews, secondary research, or review of key company materials. This discovery will bring the team up to speed on the key issues and background necessary to conduct the project.

- **Initial workshop.** Workshops are one of the key ingredients of the Callan Consulting methodology; we consider them to be a secret sauce (see previous call-out). The initial workshop is typically used to bring all cross-functional stakeholders and influencers together to understand project objectives, identify research items or hypotheses, and otherwise make critical decisions regarding the project. Using a dispassionate, third-party facilitator instead of an internal stakeholder to facilitate the session ensures a level playing field among all participants and sets the team up for success. And including cross-functional representation among all key stakeholders not only lets you gather inputs from the broader team, but also allows you to build alignment within the key stakeholders.

- **Research/analysis/work phase.** Once the initial workshop is complete, the key work stream(s) of the project occur. The specific research, analysis, or work to be conducted at this point depends on the type of project and could include qualitative or quantitative research, materials development, market opportunity assessments, product launches, or just about any other product marketing activities. The work phase will be governed by a work plan that is identified and developed during the kickoff/workshop phases of the project, and ongoing stakeholder check-ins should continue to occur throughout.

- **Readout/decision workshop.** This is another oft-overlooked but critically important stage in the success of a product marketing project. Not many companies begin product marketing projects with an initial workshop, and even fewer conduct one at this later stage of the project. But we believe this second workshop is key to a project's success, and we also consider this second workshop to be part of what sets Callan Consulting apart. It's best to time this workshop somewhere around the three-quarter point of the research/analysis/work stage.

The goal of this workshop is to share draft learnings, findings, or outputs with internal stakeholders and give them an opportunity to review, discuss, and provide input. Doing this in a workshop in which all stakeholders participate has several advantages, not the least of which is that it enables stakeholders to hear and respond to each other's feedback, which can lead to a better set of inputs for the work team.

- **Final materials development/delivery.** Once the team has the input from the key stakeholders through the second workshop, it can incorporate them and develop the final deliverable or work product and then roll the results out to the key stakeholders. If the readout/decision workshop is facilitated well, using a third-party professional facilitator, there should be sufficient feedback at this point that the product marketing team can take that input and use it to create the final deliverable.

Leveraging Technology for Successful Remote Workshops

Callan Consulting has been leading executive workshops for decades and has found that there is no substitute for getting the stakeholders for a project in a room together to get on the same page and make key decisions. But the nature of those workshops has changed over time. While getting in a room used to mean convening in the same physical location, the remote-work culture brought about by the pandemic has led us to embrace remote workshops in many cases. Using virtual whiteboarding technology such as Miro, along with videoconferencing and screensharing capabilities from providers like Zoom, we have translated our workshop facilitation methodologies to work virtually, including blue-sky brainstorming, deep-dive analysis, option prioritization, and identification of action owners and next steps. While we still believe there's no substitute for getting stakeholders together face-to-face, we can also perform highly effective workshops remotely.

The Callan Way Can Be Applied to a Wide Range of Activities

Much of this paper discussed the Callan Way as a general set of tenets and a core methodology that can be applied across a broad range of activities. But one of the most important aspects of the principles captured in the Callan Way is that they can be applied not just as a general framework but to a broad range of specific marketing and product marketing activities.
A subset of these product marketing activities can be found in Figure 4.

Figure 4 – Applicable Use Cases

STRATEGY/ PLANNING	RESEARCH	GO-TO-MARKET	CUSTOMER-FACING MATERIALS	SALES ENABLEMENT
• Market strategy and plan development • Market sizing/ segmentation • Product market/fit assessments • Ideal customer profile/personas development • Marketing audit • Planning workshop facilitation	• Quantitative surveys • Focus groups • In-depth interviews • QualBoards • Discrete choice studies **Applicable to:** • Thought leadership research • Pricing and packaging • Customer journey mapping • Voice of customer • Customer win/loss	• Messaging platform development • Product launch planning and execution • Growth marketing • ROI content • Competitive analysis • User group management • Pricing and packaging • Lead generation • PR/AR	• Collateral • Web content • First-call decks • White papers • Case studies • eBooks/infobriefs • Brochures/datasheets • Blog entries • ROI materials • Thought leadership content • Social media • Customer/company videos	• Sales master plans • SDR team stand-up and enablement • Account based marketing (ABM) • Playbooks • Battlecards • Sales training • Ongoing planning/support • Compensation,

Source: Callan Consulting, 2024

Broadly speaking, Callan Consulting breaks these use cases into five major areas:

- **Strategy and planning.** The Callan Way can be applied to many different activities necessary for marketing teams to understand their market segments and develop plans to address them. This includes market strategy and plan development, market sizing/segmentation, product market fit assessments, ideal customer profiles and persona development, marketing audits, and planning workshops.
- **Research.** The Callan Way is particularly well-suited to guiding teams as they conduct research projects, whether to better understand customers and their needs through win/loss studies, customer journey mapping, or voice of customer research; to understanding pricing and packaging options; and to building thought leadership research. It can be applied to quantitative surveys, focus groups, in-depth interviews, QualBoards, and discrete choice studies.
- **Go-to-market motions.** Product marketing teams need to perform a broad range of activities to support their company's go-to-market motions, including messaging platform development, product launch planning and execution, growth marketing, ROI analysis and content, competitive analysis, user group management, pricing and packaging, lead generation, and PR/AR activities. The Callan Way can help maximize success across all of these activities.
- **Customer-facing materials.** Developing customer-facing content is a core responsibility of any product marketing team, and the Callan Way is particularly well suited to developing compelling content. Content types can range from company or product collateral to web content, first-call decks, white papers, case studies, eBooks or infobriefs, brochures/datasheets, blog entries, ROI materials, thought leadership content, social media, or customer/company videos. It can be applied to any content a company needs to successfully tell its story.
- **Sales enablement.** In addition to customer-facing content, product marketing is often on the hook to develop internally facing tools and to train sales and business development teams to succeed in competitive sales engagements. The Callan Way can be useful when developing sales master plans, enabling SDR teams, building playbooks and battlecards, coordinating sales and marketing with integrated ABM campaigns, performing sales training, providing ongoing sales planning and support, or planning for sales compensation and territories.

Where Do You Go from Here?

To summarize, the Callan Way consists of seven key tenets and a core methodology that can be applied to bring best practices into nearly any product marketing engagement. We have honed and refined these best practices over the decades that we've been performing product marketing, and we are making the Callan Way public to educate other product marketing practitioners and encourage them to use the methodology to improve their own practices.

Long-time product marketing practitioners reading this paper may resonate with many of the concepts here, and many may even feel that they have implemented or are at least working toward implementing some or all of the ideas we have presented. While that may be the case for some product marketing teams, Callan Consulting has supported many dozens, even hundreds, of product marketing organizations over our nearly 25 years of existence, and we have seen far too many marketing organizations where the day-to-day reality falls short of the ideal. We have seen countless organizations that have struggled with at least one, if not the majority of the seven tenets, and that fail to implement a consistent methodology for their strategic projects. We have seen product marketing organizations stumble again and again. We know because we are often called in to clean up the mess.

As you digest this material and consider how you can apply it to your organization, we recommend you think about the following:

- **Set and communicate expectations.** Give this document to your team to read. Bring it up in your team meetings, and let your team know that you expect them to begin implementing these best practices. Set them as part of your team's OKRs or MBOs. Give brown bags where you talk through how to apply the best practices, and give your team an opportunity to think through means and methods of applying them.
- **Reinforce and verify.** Expertise is gained through repetition, not in a single training session. Let your team know that you expect them to follow these guidelines and that you are checking their work and verifying it. Review the status with individual team members and recognize them when they implement the Callan Way best practices; coach your team to implement them when they do not.
- **Get expert help.** Whether from Callan Consulting or another outside agency, resources featuring tried and tested product marketing best practices are available. You can implement these resources, either to provide direct training to your teams (we will be happy to lead such sessions) or by having your team work with outside agencies to learn their best practices. Working with firms that understand product marketing and the tenets of the Callan Way can help ensure that you not only apply those best practices to individual projects, but also transfer those best practices into your marketing team.

At Callan Consulting, we love product marketing. It's what we do, day in and day out, and it's how we've built our careers. We like to think that we have some helpful perspective to add to the mix, and we hope that some of this material is helpful to you in your marketing practice. But we also stand ready to help implement these best practices for teams who require a little help. So whether you decide to apply the Callan Way directly to your product marketing efforts, or you would prefer to have us help apply it to your next marketing project, we are excited to help make a difference in your marketing efforts.

About Callan Consulting

Callan Consulting has been offering executive-level marketing consulting services to technology companies since 2000. Our team brings decades of technology marketing experience and has successfully completed thousands of strategic marketing projects to help our clients achieve their go-to-market goals.

We provide a broad range of services, including marketing strategy, customer research, marketing materials development, ROI modeling, and even fractional CMO assistance, where we provide strategic marketing leadership on a part-time, temporary basis. We are also committed to giving back to the world, dedicating a portion of our time to work on social impact initiatives, with a particular focus on Sub-Saharan Africa.