

# Digital Marketing Newsletter

For Entrepreneurs, Small Businesses, and Professionals

**VMG**

Issue No 3 | July 1, 2019

## Talking to Matt Lehrman

**Matt Lehrman is a Strategist,  
Consultant and Speaker on topics of  
loyalty, customer engagement and  
audience development.**

He says “Do you know what it is to be at a theatre two minutes before the show begins and the lights come down and the stage lights up and the curtain go up? The sense of electricity and anticipation with the audience eager and hopeful about the journey that is about to unfold.”

**Matt Lehrman, Strategist and Speaker, says it's all about engagement in today's world. Matt's approach to loyalty and engagement is grounded in the concept of "audience development" - that within every job we hold, every role we play, and every responsibility we assume, there's an opportunity to build a community of support to help us accomplish our greatest objectives.**



**What do you mean by engagement and why do you say it is everything?**

**T**hat is a key question. Like a lot of people, I worked my way up in a career of sales and marketing. When people work in business, they spend a lot of time with sales and marketing challenges on their mind:

- ▶ How do we get new customers?
- ▶ How do we strengthen existing relationships?
- ▶ How do we get those people to come back?

If you are in a sales and marketing mindset, it is like playing the old Pacman video game. In the video game, Pacman runs around to gobble up as many points as possible, which is quite an indiscriminate way of pursuing points. Gobbling up as quickly as you can is what the sales and marketing mind set is all about.

I say engagement is everything because there is something about the connection we make with our customers, our supporters and/or friends. It is

not just about gobbling up relationships but it is about doing three things:

1. How do we attract and hold their attention?
2. How do we deliver and derive value?
3. How do we gain momentum with our relationships; that is, how do we ensure that the people with whom we do business will come back to us for more?

The combination of these three things - attention, value and momentum - is the key to what momentum is all about. If you are focused on these three things, then you are focused beyond just making a sale.

**Please describe your business.**

I do two things in my practice. I am a professional speaker and a management consultant.

**"Engagement is everything!"**

As a speaker, people hire me to give talks about the nature of engagement. I have created several frameworks – innovative ways of thinking about the nature of engagement that can be used like a checklist or protocol.

When you think about engagement, there are a few things you need to address like the world of difference in a business relationship between 'what

we give' vs. 'what they want'. My job is to connect these and help business leaders figure out how they can give people the kind of relationship they are seeking to achieve. That's my job as a professional speaker.

As a consultant, I am asked to assess and improve how companies and non-profit causes actually conduct their engagement. As a part of this, I speak with my clients' customers, look at their facility, analyse their sales and marketing processes and not just the selling parts; but every interaction they have with their customers. I then can come up with very specific recommendations about what the company can do to make those customer connections more engaging.

To give you a metaphor, it is the difference between having a couple of hooks that hold different things together vs. having a long sheet of Velcro that binds two things together. With engagement, we aspire to be like the Velcro; to create many small ways that add up to connect a customer to a company or a cause.

**How do organisations know that they are successful on the engagement bit? Is it measurable? There are already a bunch of metrics to track various types of engagement like blog posts comments, etc. Is there anything to track beyond that to know whether true engagement is happening?**

That is a great question. There are 4 ways to measure if a company or a cause is successfully engaging:

**1. The metrics with respect to the actual facts that can be measured:** number of sales, number of renewals, etc. I look to see if there is any strong patterns there. For companies that depend on repeat business, the question is what percent of the people who buy will continue to buy again. Is your company trending in an upward trajectory over a period of time?

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**2. The objectives of the company:** It is one thing to look backwards to analyze the trajectory and it is another to understand the growth objectives of the company, going forward. Is the engagement strategy strong enough to raise you to a particular level? Are you being purposeful about the way in which you proceed?

**3. What kind of recognition are we looking at?** If people are engaging with us and are excited by the work that we do or are gratified by the work that is going on, then we are going to look into social media and other places to understand if people are talking about us or acting as ambassadors by sharing the work that we do. Are we creating sharable moments that people want to put as a way they lead their lives.

We will look to check if they talk about a contract with you or if they would talk about the experience they had with you as exemplary. When we book new businesses, one

of the questions we need to ask is how they heard about us. It is a good sign if we see other customers recommending us to others as well.

**4. How do we and our customers feel?** I often interview my clients' customers and/or supporters to ask questions like what they like when they do business with this organisation. Or, why does supporting this organisation feel good to them? We want to know if we are making friends and helping people accomplish their goals. Are they happy as a result of our engagement?

These four things - the measures of achievement, pursuit of key objectives, the momentum created and the feel-good factor - is what I look for when assessing a company's level of engagement.

**Do engagements always lead to positive outcomes? Have you ever had the experience wherein the engagement was positive but it didn't lead to the expected outcomes?**



Well, I have a different take on this. If a company's only goal is to make sales, then I don't think they are in an engagement mind set. Engagement should be considered as its own virtue. Sometimes, the payoff for engagement will take longer than any sales cycle.

To quote an example, one of the frameworks that I teach is through a quadrant chart. Each quadrant represents different types of potential clients:

1. The top right corner of the chart is occupied by customers who have the highest level of awareness and the highest capacity to participate with you. I call those people Devoted. They are the ones who know you - they love you and the work that you do. When they have a need - you are the person they will call.
2. The lower right is occupied by those with high interest but lower capacity. I call them Oriented. The oriented people are in the market for what you're offering. They know that they need a particular service or product but they are not sure who to go to and so they are shopping around. They're looking, but so far undecided.
3. The lower left corner comprises of people with low interest and low capacity. The ones we often times write off because why would anybody go after somebody with low interest and capacity? I call them Asleep. I'm not saying they are bad people. I choose the word Asleep

simply to describe that the opportunity here is to wake them up. So we have to awaken them to the opportunities we offer them.

4. The upper left quadrant is what I call the quadrant of magic and wonder where all incredible things are possible. It consists of people with high capacity but low interest - they have the time and the money to do things but they are filling their needs in getting things done in some other way and I call them Uninspired. Our job is to inspire them. It is not enough to send them another post card or email and inform them. We have to actually inspire them, which means that we have to excite and enthrall them - that is, to enter their hearts and not just their heads.

When I focus on engagement, I look at the people who may be reading my clients' newsletter or people who they communicate with in some way or the other. I help my clients find ways to appeal to people in each of these different quadrants.

The devoted want depth. They should be connected at a very deep level with what's going on in your company. They would like to see pictures of people whom they have been dealing with. It is advisable to let them know about your people than just the regular stuff you do. They are devoted and they care. You have opportunity to connect with these people even more deeply.

For the oriented, the sales and marketing mentality kind of makes sense. If they are in the market and they are looking for services that you offer then you need to find some way to distinguish yourself from all the competition that is out there

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and you need to be visible. So, marketing and salesmanship is required in that space.

For the asleep, whom we usually give up on, you can make a difference if you think how to plant seeds in here for the future. How do we create relevance for someone on their terms from your business? Your job to awaken the asleep is not about what you write in your newsletters but what you would perhaps have guessed right for other people's newsletters. Or, how you get visibility in other places so that there are people out there saying things about you to people in their credible circle. That circle can comprise of people who are key to your business.

I'll be honest, Kartik about how I found out about your company. I found it from the book called The Four Day Work Week. Your company, among a few others was mentioned in it. But, until then I didn't know such a realm existed. It took a book to wake me up and make me realize that I could operate in this way too.

In the quadrant of the uninspired, the job isn't just to inform people. It is to inspire them to do something inspiring. It has to be something more than just another mailer or sending out another newsletter. You should think of extraordinary things that you can do or accomplish. For instance, amidst all the news about the fire at Notre Dame, I noticed that KLM has offered to contribute free airfare for everyone who is coming in to help with its restoration. Business leaders should be asking similar questions for how they can support worthwhile initiatives in their own communities.

You should think of what your company would say in response to such an act. This is important because you would require a thousand man hours

of support to this cause. Would that be an extraordinary contribution that raises visibility and may be introduce you to a whole bunch of people who never knew that they could have used your service for such an event. That's how you inspire people on a very large basis.

The issues doesn't have to be of that nature. There are a million possibilities of things that you could do. Only that in the quadrant of the uninspired, we have to find something out of the ordinary.

When I look at engagement, I make people aware of these quadrants and help develop strategies for people belonging to each of these quadrants. I know that a lot of companies operate on a lean finance without a lot of resources. So, it is hard to do everything at the same time. At least we need to have an idea of what needs to be done in each of these areas. In the course of the year we should be making efforts in each of these directions.

**Very informative! Matt, you mentioned that you are a professional speaker and a consultant. Which of these two activities take up most of your time?**

I guess speaking takes up more of my time because speaking also has travel built into it. I spend a fair amount of my time for that.

Honestly, I love speaking and being invited as a speaker. I love sparking up these kinds of conversations. The substance that I have to teach is also an opportunity to be inspiring and help people - that never gets old.

I love watching people realize that there is more opportunity for strategy in the good work that they are already doing.

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## How did you get interested in this space?

I spent most of my career in sales and marketing and 20 years of that in the marketing of arts and cultural activities. I worked for a performing arts venue and a museum. I was the marketing Director for the Scottsdale Center for the Performing Arts and the Scottsdale Museum of Contemporary Art.

That experience led me to found a non-profit organization aimed at raising visibility of arts and cultural organizations, all over the State of Arizona. I ran that organization for about 12 years. When I left that organization, I told myself that I love this work but I would like to do this on a national level and I wanted to teach. A lot of the skills that I have learned came out of the non-profit sector and out of the performing arts community specifically.

That aspect is important because when I think about the perfect moment of engagement - what everyone aspires to achieve, this is the experience:

Do you know what it is to be at a theatre two minutes before the show begins and the lights come down and the stage lights up and the curtain go up? The sense of electricity and anticipation with the audience eager and hopeful about the journey that is about to unfold.

Working in the performing arts, I got to be backstage as well. Two minutes before the curtain goes up, the performers backstage jump up and down, stretch and get their energy level up. All of that happens so that at the moment when the show starts and the theatre goes dark; when the stage gets bright, they can give it their best shot. That, to me, is a perfect moment of engagement.

When the customer is ready and focused and eager is the perfect moment of engagement.

I look at companies and I see lots of moments of engagement. The opportunities of engagement happens when someone makes a phone call, when they receive a newsletter in the mail, when they go online to place an order or for information. We should be looking for sourcing those moments of connection. And during those moments, we need to understand how we can appear trusting, eager and welcoming as if they were an audience watching the opening of a show.

My background in arts and theatre positions me to look at the moment of engagement and advise that these are principles that are apply here as well.

## Beautifully said! Can building engagement be systematically taught and practiced across the company? Or does it lapse in a brief moment after the initial interest?

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I love your question. Building engagement requires real strategy and diligence – let us not underestimate that. It is not obvious whose responsibility it becomes whether your company is large or small. If a company says that we like engagement and we are inspired and that they we are delegating

it to their Marketing Director and change the Director's title to Director of Marketing and Engagement, it's a waste of effort. If they think that they can delegate it, frankly I don't think they are set up for success.

Sales and marketing is something you can delegate but engagement has to be a commitment that everybody in the company has to make. One of the things that I do when I work as a consultant is look at a company and seek to understand everyone's responsibility for engagement, no matter what their job is.

How do we put in place the corporate values around engagement and how do we put in place the engagement procedures and discipline it so that as new people come on board those expectations are clearly laid out?

One of the slides I put up while speaking is one on Candyland - popular board game in the US. I then ask if my audience can be as linear in their engagement processes as if they were playing Candy Land; as if they were taking their customers from beginning to end and each colour-coded square represented something that they wanted their customers to feel.

To quote an example, to map out a customer's journey map - what happens when a customer calls you? Let us just say that when they call, they reach a live person and the live person says that they are not sure who our customer needs to talk to and asks time to find out. After a while this person gets back and advises whom they need to speak to and transfers the call. The call transfer ends up with the customer listening to that person's voicemail to leave a message. So, the customer leaves a message asking for their call to be reverted. These are the kind of linear steps that happens commonly in a business.

Now, let us analyse how would we, as the customer feel at each of these stages of engagement?

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We call in eager and ready and are put on hold – chances are we feel patient. We are told that we are being transferred - we feel hopeful. But, and with the voicemail, we would feel disappointed. We are eager to talk to a person and end up just leaving a message. Then, we wait. Now, depending on our need, we can have a range of emotions during the waiting period.

There are customers who expect to get a call in 5 mins, some in an hour or two and some don't mind waiting for 24 hours.

**Very interesting and insightful, Matt. I am going back with a lot of takeaways from this conversation. I am definitely going to get back and check how my phone systems work.**

In today's world of global business, sometimes people may have to wait for hours before they get a response, given the time zones we deal with. An auto message and a dedicated mailbox for emergency mails can make a lot of difference in terms of reassurance. This is key to engagement. ■

*Excerpts of a conversation with Kartik Isvarmurti, Managing Editor.*

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