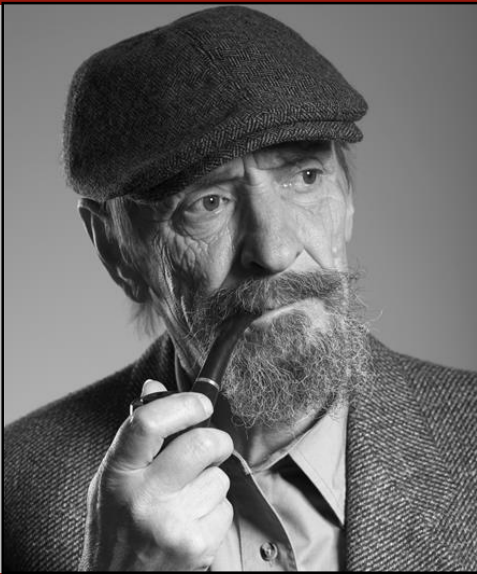


# Greysmoke's 11 Maxims

On Demand Generation Campaigns  
For the Business-to-Business Enterprise

A **Visual** Whitepaper by Greysmoke

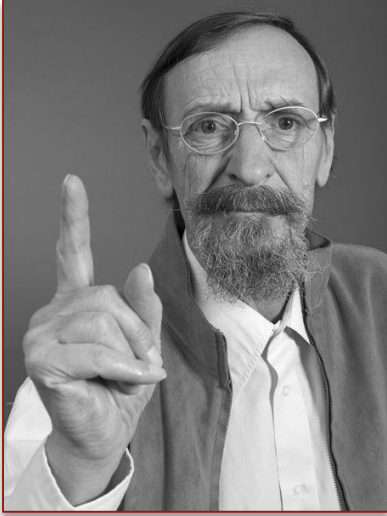


# Greysmoke's 11 Maxims

On Demand Generation Campaigns  
For the Business-to-Business Enterprise

This visual whitepaper draws upon more than 30 years of experience generating demand for business-to-business enterprises. But as the author is keenly aware, there's always something new to learn. Please share your feedback at [Greysmoke@Outlook.com](mailto:Greysmoke@Outlook.com).

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# Why 11 Maxims On B2B Demand Generation?

## It could have been 1100.

Campaigns are complex business processes that span systems, databases, creative processes, branding, messaging, marketing strategy, and a myriad of tactics associated with the marketing disciplines of public relations, social media, marketing communications, analyst relations, advertising, product marketing, graphic design, telemarketing, international business and project management. And, perhaps more than any other marketing discipline, demand generation requires close coordination with all available sales channels.

This visual whitepaper was created to highlight demand generation fundamentals that are, in the experience of the author, more likely to be underserved.

Your mileage may vary.

## Who Should Read the 11 Maxims?

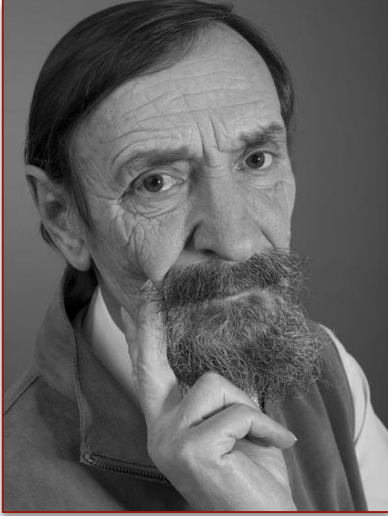
Campaigns are serious business. They're a critical part of creating revenue opportunities for an enterprise's sales resources.

If you're in marketing, sales or business development, this visual whitepaper will give you a peek at the complex considerations your campaign teams are dealing with.

If you're early in your campaign management career, I hope you will find information of value herein.

And, if you're a serious campaigner, use it to encourage your colleagues to better understand the importance and complexity of your campaigns.

Demand generation is not pretty.



# Greysmoke's 11 Maxims

*On Demand Generation Campaigns*

*For the Business-to-Business Enterprise*

|  |    |
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| 1. Know the Change.....                | 5  |
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| 3. Know the Fullness of Strategy ..... | 11 |
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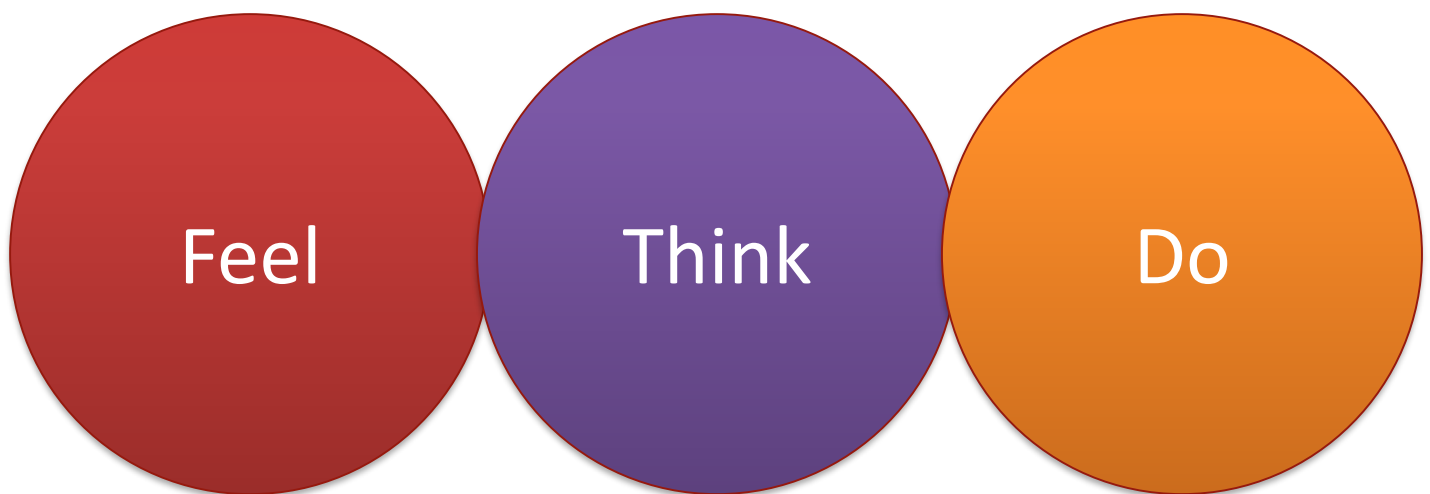
MAXIM

# 1

# Know the Change.

Campaigns speak to their target audiences for the purpose of changing the people in those audiences in some way.

At their most fundamental levels, campaigns can potentially address, and thereby change, only the three things illustrated below. Namely, what people...



Change

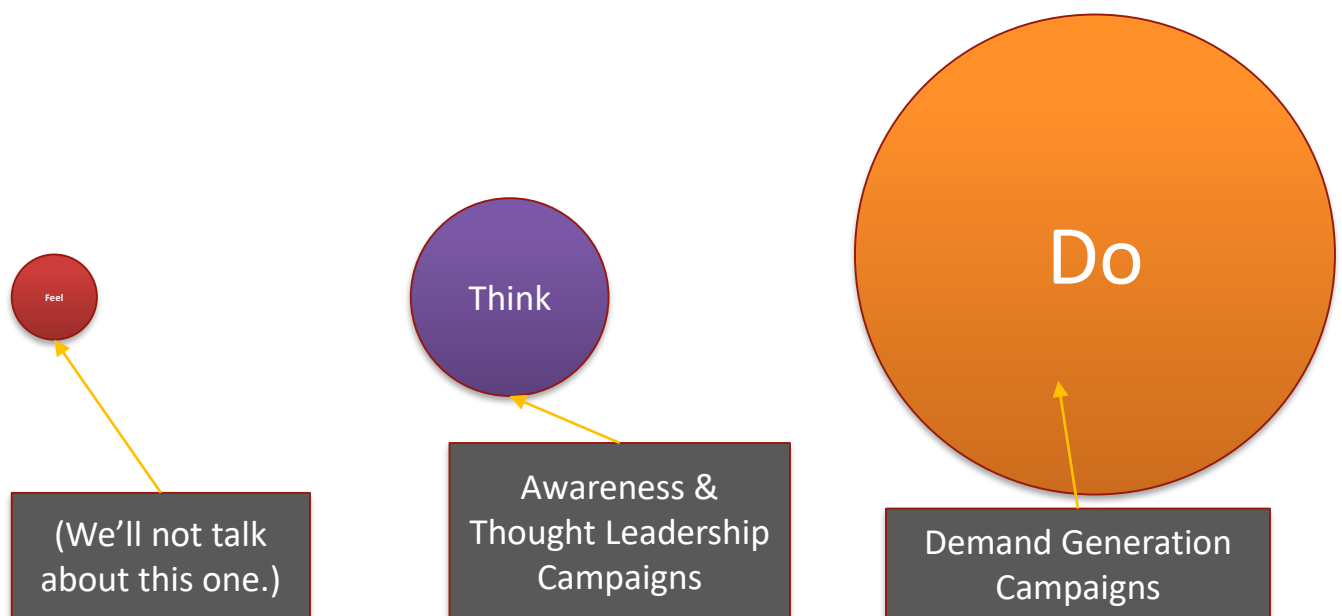


# Know the Change.

## The B2B reality: we're not comfortable with feelings.

This isn't a sign of social maladjustment. It's a reality stemming from the fact that our offerings are purchased through a complex sale involving many gatekeepers, influencers and decisionmakers throughout the marketing and selling cycle. Different roles require different messages, value propositions and campaign executions. And the challenge of addressing the feelings of such a crowd is too resource intensive to consider.

Skillful B2B marketers grasp the importance of influencing what our audiences think about our products and solutions, which is done through campaigns aimed at "awareness" and "thought leadership" goals. Doing so conditions a market and makes it more receptive to demand generation messages aimed at getting an audience to act.



**But here's another B2B reality:** few executives will approve budget for campaigns aimed at addressing what our audiences *think*. It's much, much easier to get funding for campaigns that address what audiences *do*. And that's why – for better and worse – demand generation campaigns dominate the B2B marketing landscape.



MAXIM

#2

## Chamber the Message.

**Chamber**, in the martial arts, means to prepare for an action by drawing a limb or weapon to a position where it may be charged with kinetic energy.

But how does one “chamber” a campaign message?





MAXIM

#2

# Chamber the Message.

## Brand

Your universal promise of value.  
It remains true regardless of what you sell or to whom.

## Product / Service / Solution

What is it? Why does it exist?  
What is it good for? Whom does it help?

## Features / Benefits

Here's what your product, service or solution does,  
and what makes it valuable to your buyers.

## Advantages / Differentiators

Here's how your product or solution changes the business lives of your buyers.  
And why it does so in a better or at least unique way, compared to your competitors.

## Proof Points

Don't take our word for it: here's proof. A customer story for example.

## Begin with your message architecture.

Already some of you are chuckling wryly, "Yeah, right." But you *must* have a rationalized, clearly communicated message architecture as a starting point for campaigning. If you don't, your campaign messages will be chaotic, poorly focused, and less effective.

If (when) your message architecture is defined, it should be presented in a tiered structure something like the boxes above. (There are many similar models. I won't tell you which one is best. But please pick one, endure the hard and often tedious work of building it, and demand that everyone stick with it.)

And if you really don't have one... please convey my concerns to the most senior executive in your marketing organization. Poor message alignment is a waster of time and money, and he or she must take action.

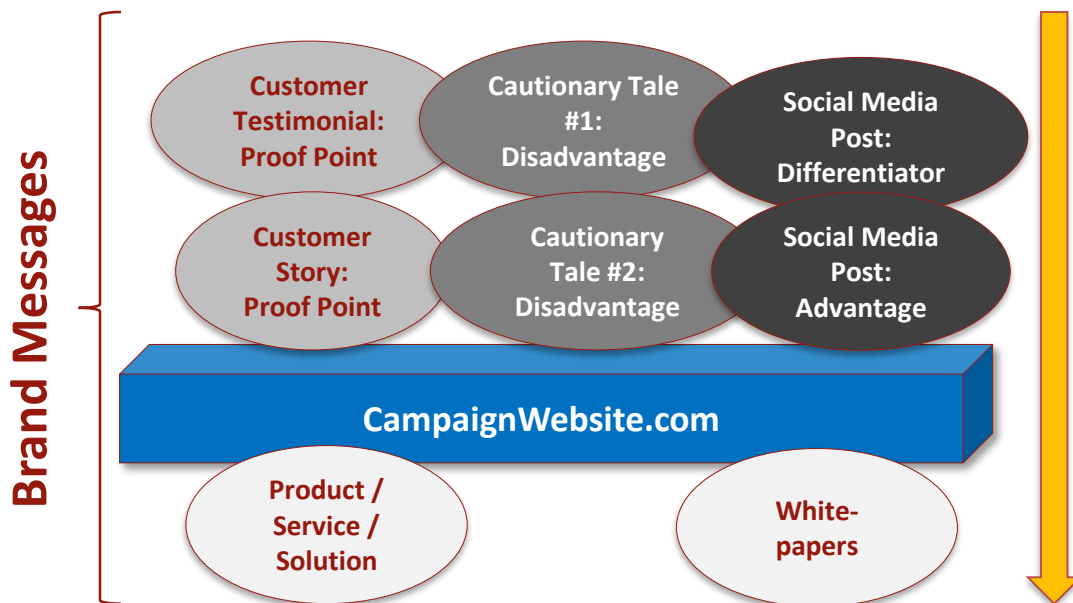
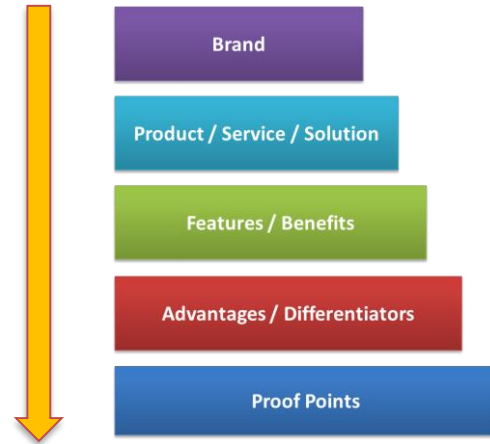




MAXIM  
#2

# Chamber the Message.

We think of message hierarchies from the top down. And indeed, the hierarchy must serve as the principal guide for campaign content creation.



But each individual tactic will certainly not express the entire hierarchy. And campaign communications will often lead with bottom-tier messages, around proof-points or advantages for example. They may even lead with “negatives,” such as messages designed to induce anxiety over business problems that are resolved by the offering. (Please never insist that messages always be “positive.”) Such messages are better suited to the campaign’s role of getting its audience to take an action.



MAXIM

#2

# Chamber the Message.

## **Don't over-exert your campaign or your audience!**

Brevity is a desirable attribute in campaigns, as in many other aspects of life. After all, you're not trying to do something as complex as selling; you're just asking for a response in exchange for an offer (see Maxim #6).

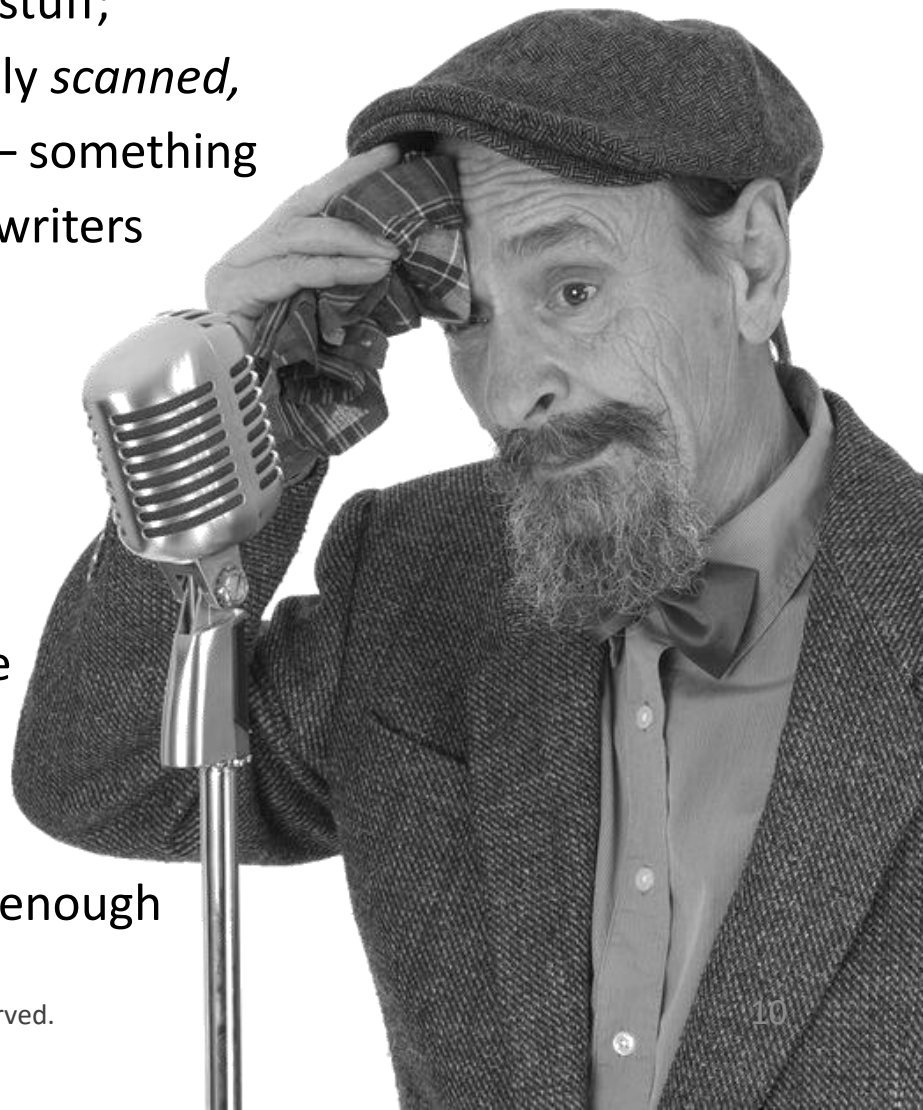
**Do** use copy sparingly

**Don't** imagine you're writing poetry (it's true: nobody reads this stuff; communications are routinely *scanned*, whether long copy or short – something the “old school” direct mail writers learned decades ago)

**Do** tell a simple story repeatedly, but use diverse communication channels

**Don't** make your audience jump through hoops before presenting an offer

Experience the joy of just enough





MAXIM  
#3

# Know the Fullness of Strategy.

**The best laid campaign plans will misfire if strategies aren't fully and accurately described in advance.** The last-minute scramble (all too familiar to campaign managers) to address missing or unapproved content can cause shattered deadlines, overrun budgets, and underperforming campaigns. Not to mention bruised egos and battered reputations.

Before campaign planning begins, these seven campaign strategy considerations must be developed, documented and approved. Please don't expect a campaign team to start without them.





# Know the Fullness of Strategy.

## Campaign Name & Offering

Getting everyone to agree on what to call a campaign can be crucial – let alone ensuring clarity about the product, service or solution the campaign is offering. Clearly describe your campaigns to all business stakeholders.

## Campaign Objectives

How many leads? How much opportunity revenue? How many meetings? How many contacts? Even “awareness campaigns” must have metrics. Set a specific target at the outset of every campaign so you’ll know when your campaigns are successful – and what campaign variables to improve.

## Sales Alignment

Sales alignment means ensuring that all stakeholders in Marketing and Sales understand the campaign’s objectives, and are prepared to take their respective actions. If your campaign is meant to produce leads, your sales team must understand objectives, timing, offers and message. Sales calls are also campaign tactics!

## Target Audience

The campaign target audience description must describe both (1) the organization and (2) individual roles within the organization. The description must provide enough information for a campaign contact list to be developed. (If your sales teams have assigned accounts, include a list of relevant accounts as well.)

## Traps for the Unwary.



Here’s an actual quote from a meeting to set campaign objectives:

“Oh, this will be an awareness campaign. We’ll have ‘soft’ objectives.”

***Awareness activities have metrics, too. Measure everything, or nothing will deliver measured value.***



MAXIM  
#3

# Know the Fullness of Strategy.

## Message Source

The description of the campaign offering must be developed and approved in advance. The burden of getting a campaign prepared for launch plus getting key collateral approved puts campaign timelines at serious risk. We've talked about message hierarchies. And product, service or solution collateral is often an excellent resource; but if none exist... what is the approved source for campaign content?

## Campaign Offers

Offers are the incentive given to target audience members for responding to your campaign. They include white papers, webcasts, discounts, and premiums. Every campaign communication must include an offer: it's one of the critical success factors in demand generation (more on this later.)

## Campaign Budget

It is crucial to define an approved budget during the strategy stage, as the campaign plan must determine which communication tactics or vehicles to use: and different tactics have different price tags.

## Traps for the Unwary.



Here's an actual quote from a meeting on campaign budgets:

**“We won't budget for this campaign. We'll do emails to our own database.”**

***Email almost never has the power to meet campaign objectives on its own. No budget means no value!***

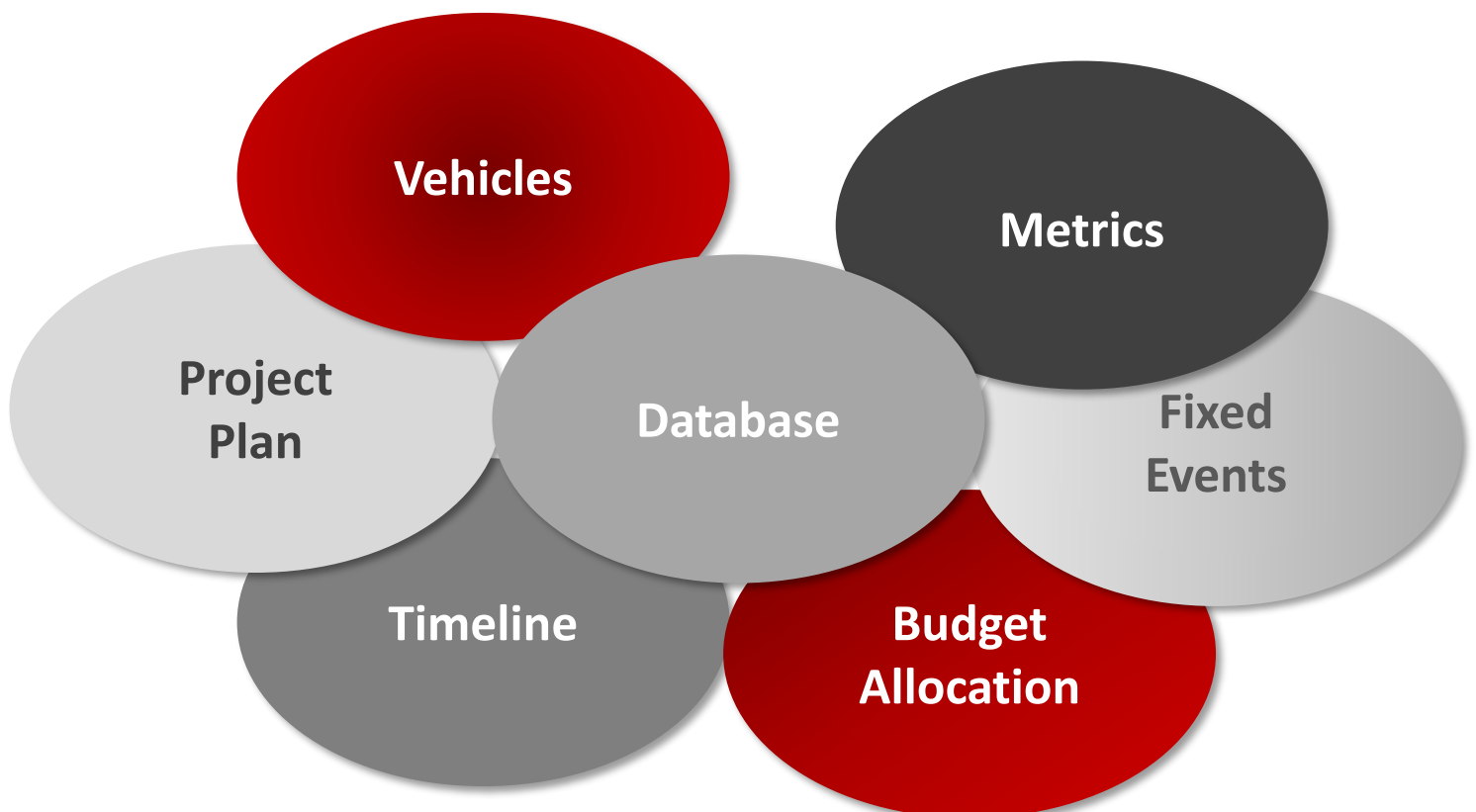


# Then, Know the Plan.

**Only after campaign strategies are defined, documented and approved, are you prepared to develop campaign plans.**

Campaigns can encompass a complex array of tactics, and can be aimed at vastly different objectives. But the basic campaign plan considerations described below will be valid for many.

And please note: for each campaign plan, there must be one campaign manager who “owns” the plan. The campaign manager maintains that plan from start to finish.







MAXIM

#4

# Then, Know the Plan.

## Project Plan

Campaigns must be managed in terms of deliverables, assignments, timing and status. For every campaign plan, there must be a single campaign plan owner. Establish a standardized project planning tool for your organization, and use it consistently to provide visibility and comprehension among all business stakeholders.

## Timeline

As you develop the campaign timeline, look at campaign execution through the eyes of your target audience. What communications will they receive? When? How often? Unless campaigns contain sustained awareness funding, your audience's ability to retain your messages must be concentrated within weeks: a few months at most; not a sprinkling of tactics throughout the year.

## Vehicles

This is a big and complex topic, so here are just two of the most basic vehicle considerations.

Integrated communications – the coordinated delivery of a common message through different tactics – are far more powerful than one-vehicle tactics. Avoid “one off” campaigns as a uniform waste of resources.

There are passive tactics and active tactics. Web content is passive; it relies on active tactics, such as email, to “push” a message. Allocate as much of your campaign budget as possible to active tactics.

## Traps for the Unwary.



**Conventional  
Wisdom Homily #1**

“Postal mail is a waste of time and money. We’ll just do digital.”

***Align vehicles with your database!  
If you only have permission to email 20% of your audience, what is your plan for reaching the other 80%?***



# Then, Know the Plan.

## Database (or List)

As you compile the contact list, you'll often begin with your company's own database, supplementing it as needed with external contacts. Many online tactics will be exposed to individuals who are not in your company's database; so ensure that you have a good mechanism for capturing new contacts and integrating them into your database. New contacts are a key source of campaign value.

## Metrics

What data are you going to capture throughout the campaign? How and when will that data be gathered and reported? Different campaign vehicles generate different data; but you must have a process for gathering and analyzing data from each vehicle. Basic metrics include email click-through rates, bit.ly tracking, website impressions, web form conversion rates, and many others.

## Budget Allocation

You determined the total budget during the campaign strategy phase; now your campaign plan must detail how that budget will be allocated across campaign tactics throughout the life of the campaign.

## Fixed Events

If a fixed event such as an industry trade show is to be included, this is a critical timeline driver. You may be able to shift dates for launching email and web content, but dates for a 3rd party event aren't likely to change.

## Traps for the Unwary.



### Conventional Wisdom Homily #2

“Don't scan everybody at that trade show. I only want good quality prospects.”

*New contacts are a key source of value. And anyone at the exhibit hall can be of value someday. Scan them all and sort them out in a spreadsheet later.*

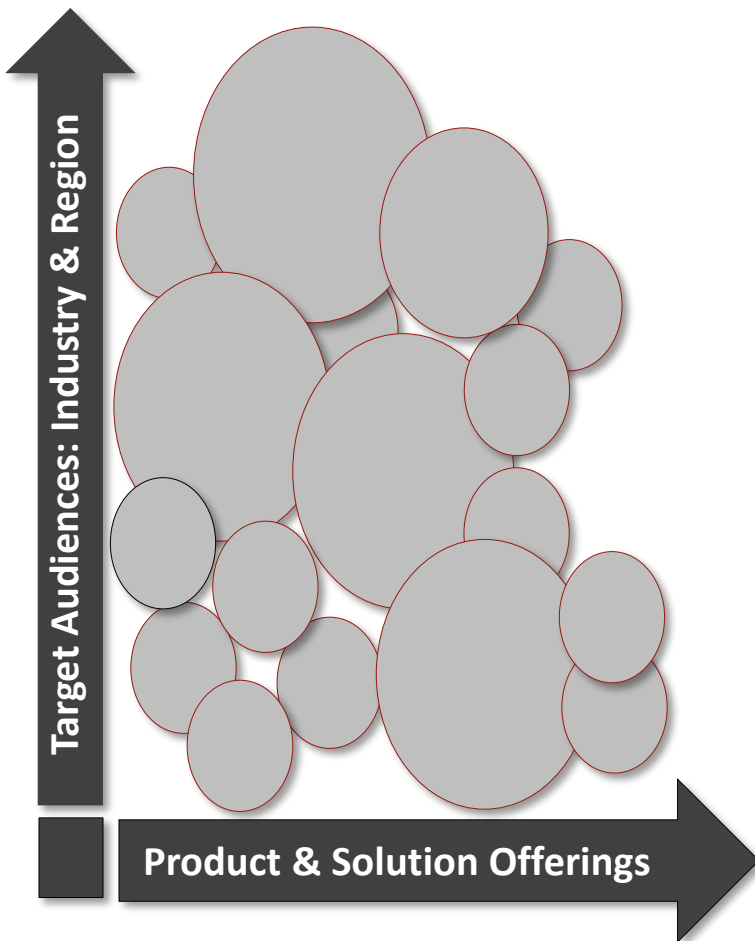




MAXIM

#5

# Be Where Less is More.



Marketing & Sales teams that initiate campaigns are often aligned by product, solution or business unit. As a result, campaign schemas in the aggregate can look like this picture: dominated by many individual campaigns designed to achieve product-, solution- or business unit-specific objectives.

**Regional and vertical marketing teams are often better aligned with customers.**

Sadly, in many cases the roles and resources of regions and verticals are designed to localize or adapt existing campaigns, rather than to create campaigns.

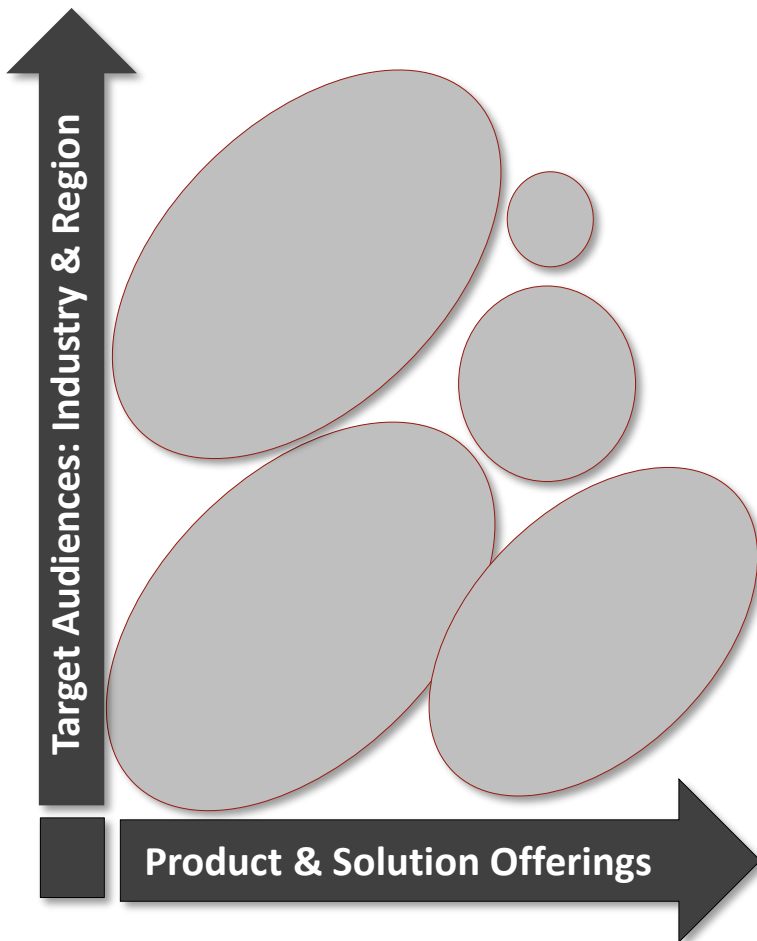
Please ensure that regional and vertical marketing & sales teams are granted loud voices as campaign strategies are being defined. They can most certainly help.



MAXIM

#5

# Be Where Less is More.



Campaigns rely heavily upon **progressive iteration**: the improvement of content and tactics through ongoing testing and repetition. This means that campaigns are more likely to be successful when they are fewer in number, but encompass more audience touch cycles. It simply gives the campaign many more points at which customer behavior can be noted, analyzed and used as a basis for optimization.

For maximum impact, consider beginning your campaign planning with audiences first, rather than organizational units such as product or solution teams. (But doing so is quite difficult if your campaign team is aligned solely by product or solution, rather than by region or vertical industry.)



MAXIM  
#5

# Be Where Less is More.

**Your customer sees her relationship with your company like this:**



**But your company may see it like this:**



**Which means your campaigns can look to your customer like this:**



Your customer should never have to think about your organizational structure. Her relationship with your company should be governed by your company's brand.

Campaigns must engage in one dialog per customer, per brand. That dialog can certainly introduce multiple *topics*, but you mustn't permit the helter-skelter pelting of disconnected messages at your customers. This may require coordination across multiple product or solution offering groups, to the extent they're focused on a common set of targets (and this is often much easier spoken about than done).



MAXIM  
#6

# Know thy Ammunition.

## There is no silver bullet.



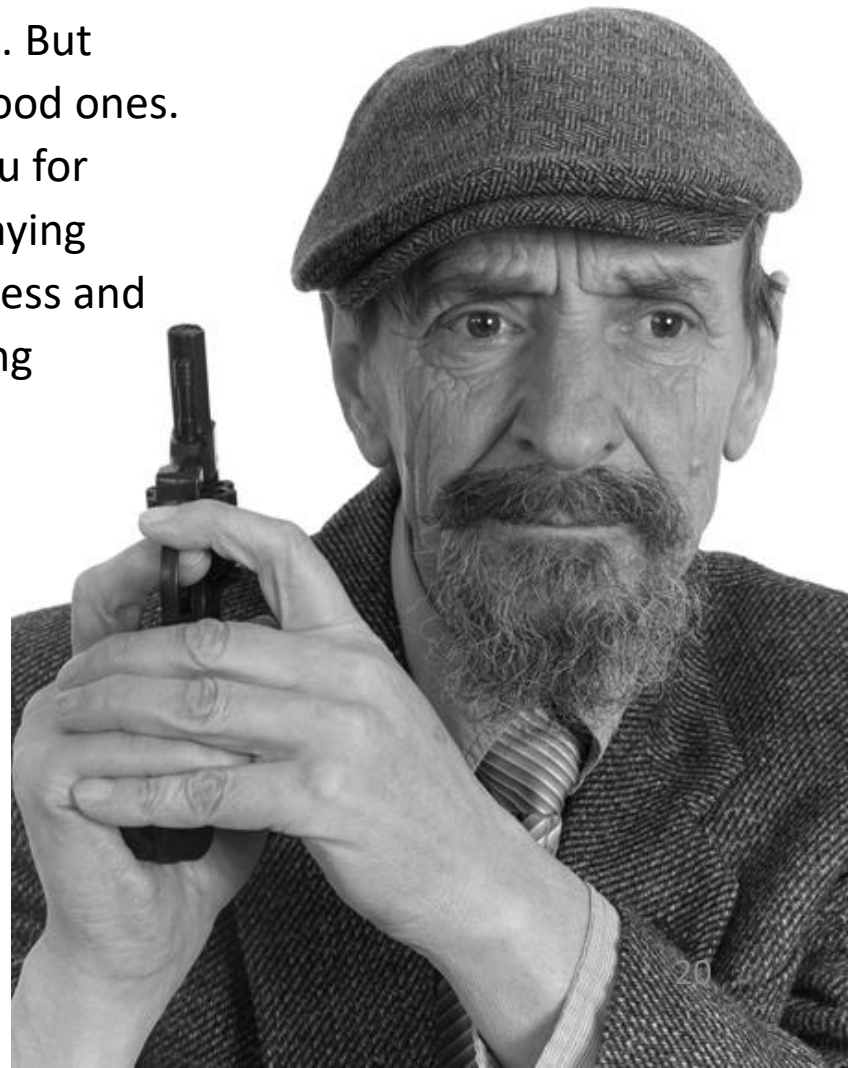
Time and again, executives search for that perfect tactic with which, by fiat, they will direct hapless campaign managers to overburden their plans. Yes, this campaigner has heard it all before....

*Seminars!* Let's invite everyone to a seminar series. I want face-time with every prospect on the planet!

*It's Social Media, stupid!* Tweet, post, link and pin this campaign like there's no tomorrow!

In fact, there is no perfect tactic. But there is a growing array of quite good ones. Use as many as are available to you for reaching your target audiences, paying especial care to the mix of awareness and demand tactics, as well as achieving proper database alignment.

Over decades, one thing has never changed: campaigns that rely on a measured mix of tactics perform consistently better than those that don't.

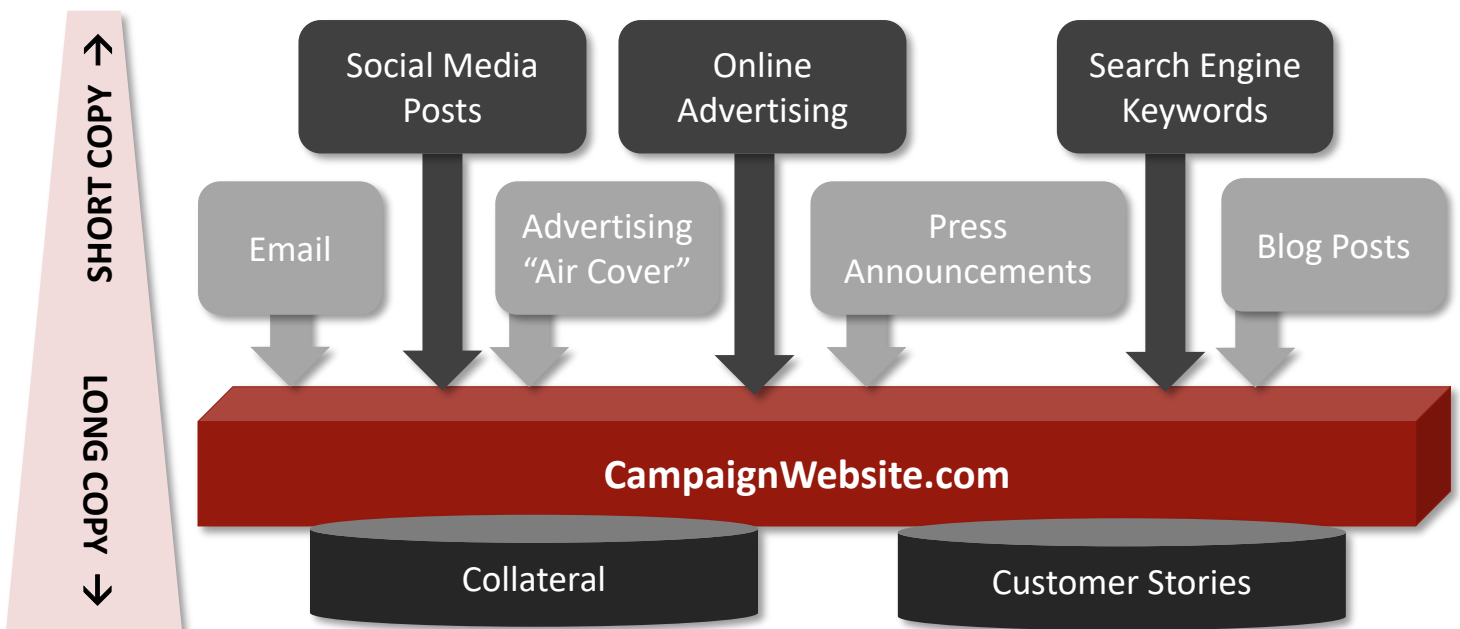




MAXIM  
#6

# Know thy Ammunition.

This model describes some commonly-used tactics (there are many others), with some indication of their inter-relationships. Those on the top tier are actively driving communications to the campaign website. Those on the lower tier are residing passively on the website (or are linked from the company website). The funnel to the left indicates the relative investment of content for each tactic.



A key factor driving campaign complexity is the need for the campaign manager to understand the unique art and science behind each tactic and communication vehicle. Which ones better influence thoughts vs. actions? How are they measured and what are the key performance indicators of each? And – most importantly – how do multiple tactics support each other throughout the campaign lifecycle? Experienced campaigners understand this complexity and deal with it as second nature. Avoid the temptation to focus on one or two “favorites.” Your campaigns will suffer.



MAXIM  
#6

# Know thy Ammunition.

**This represents the anatomy of a campaign communication, including the extremely important “offer” component.**

Often, business people refer to “offers” and “calls to action” interchangeably. In fact, they’re two very different things, as this anatomy illustrates.

## Brand

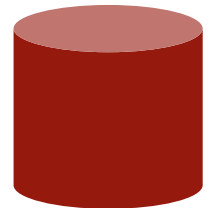
This is who we are.

Hello! It’s us.

## Offering

This is what our company wants to sell.

**This product  
can save  
you money!**



## Offer

This is an incentive to encourage audience response.

**Save 20%**

## Call to Action

This is the action that we want the audience to take.

[Click here](#) to tell us you’re interested



MAXIM  
#7

# No Offer. No Campaign.

Every demand generation campaign communication must include an offer plus a call to action. (You might make exceptions to this for brief “teaser” or “save the date” communications.)







MAXIM  
#7

# No Offer. No Campaign.

“Do you really expect me to believe that someone’s going to buy my \$1.5 million solution because I offer them a free T-shirt? Don’t be absurd. I have no budget for trinkets & trash or gewgaws & gimcracks!”



**Offers are not  
gimmicks.**

***They’re  
transactions.***

Your campaign isn’t trying to sell your product. It’s purpose is to identify qualified individuals and bargain for their attention so you can get the agreement of some to enter a complex sales process. To do so, the campaign must ask your audience members for something of irreplaceable value: their time.

To *earn* their time, give them an incentive – the campaign offer.

But align the value of that offer to the value of the campaign “ask.”

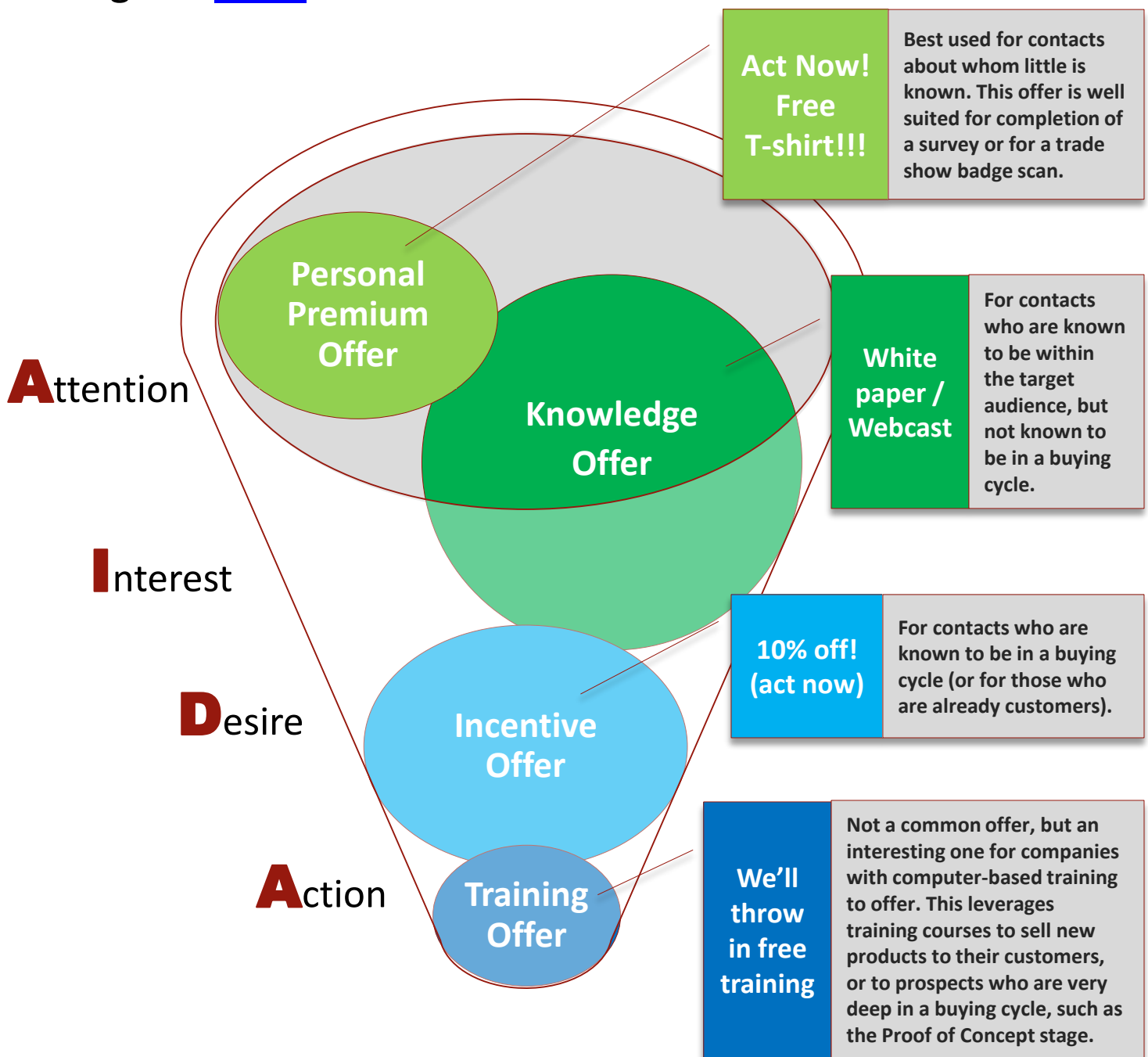




MAXIM  
#7

# No Offer. No Campaign.

There are different types of offers, with each type suited to different points in the buying cycle, as illustrated below using the [AIDA](#) model.





MAXIM  
#8

# Hear the Audience.

**So... you've responded to my campaign, have you?**



Responses are often hard to come by. When individuals in your target audiences do respond to your campaigns, be sure you are prepared to swiftly take suitable action.

**I'm interested.  
Let's talk further.**



Immediately hand these contacts over to Sales and – once they're validated – remove them from your campaign database so they do not receive future messages. They are now involved in a selling process, which means Sales must control future messages to them.

**Maybe some day.  
But not right now.**



You must have a nurture resource – and tele-channels (telemarketing) are ideal for this purpose. Marketing automation systems can also provide digitally managed nurturing. If your target audiences are small, favor tele-channels.

**Cease your communications at once!**



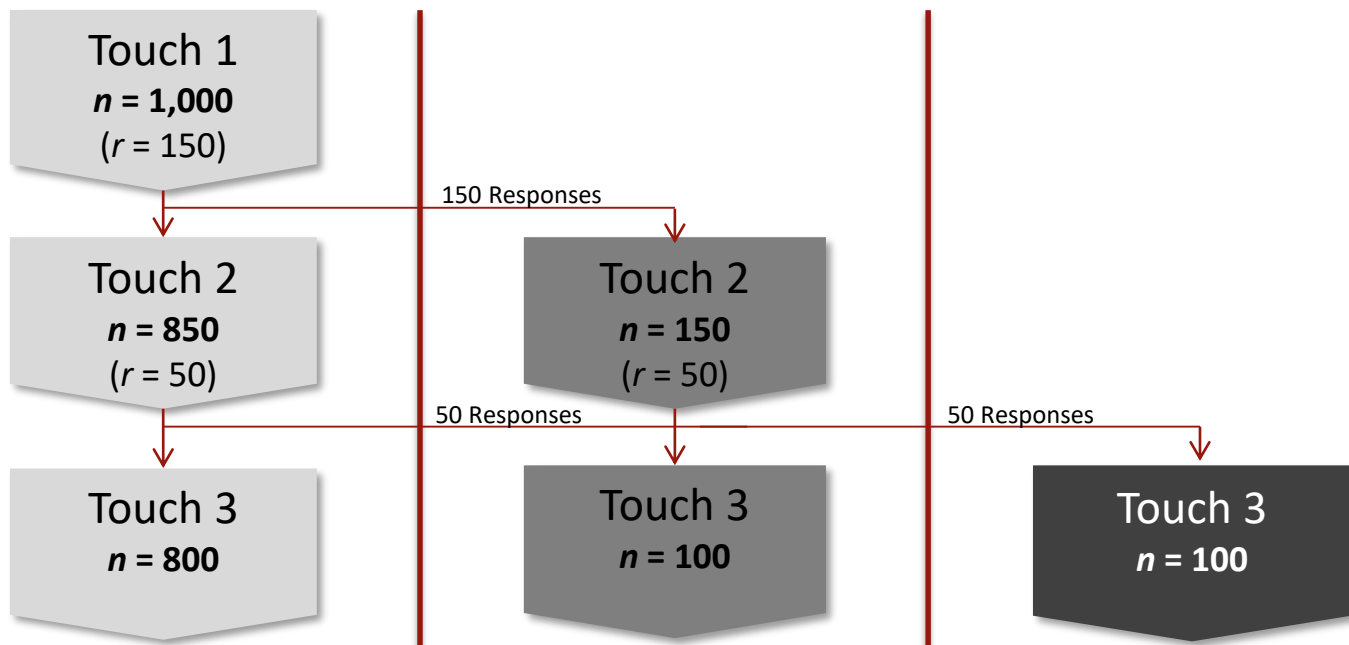
Unsubscribe the contact, and monitor these responses for both campaign optimization and database erosion. Database contacts are expensive to acquire and often are lost forever once they've unsubscribed.



# Hear the Audience.

**And it's not just about leads.** A mature campaign will interact with its audience, shifting its execution path as the audience responds to achieve maximum impact.

In this example of a three-touch campaign, target audience members who accept an offer at each touch point are moved to different “swim lanes” where they receive different campaign touches and offers.



$n$  = size of contact list  
 $r$  = number of responses

*Not shown in this example: audience members who qualify into a buying cycle at any point should be removed from the campaign.*



# Go Where Uplifting Begins

**If you believe creative content is the most important part of a campaign, you're only 85% wrong.**

Campaigns offer many variables for analysis and, therefore, many opportunities for optimization when they underperform. But where do you begin?

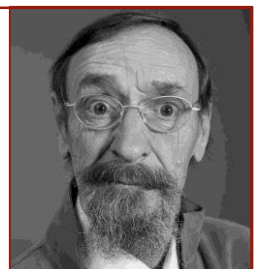
Decisions about campaign improvements should be governed by their **Performance Uplift Potential**, as shown in the chart above. When campaign performance needs improving, turn your attention first to variables with the greatest potential for positive impact on performance.

This chart provides guidance on where to begin making performance improvements: begin optimizing with the list of people in the campaign's target audience. When campaigns underperform, it is often tempting to address creative first – because it can be easier and more engaging to address. But you must only do so after validating first the target list, then the offer, and the vehicle performance.

| Primary Campaign Variables | Performance Uplift Potential |
|----------------------------|------------------------------|
| List                       | 35%                          |
| Offer                      | 30%                          |
| Vehicle                    | 20%                          |
| Creative                   | 15%                          |

Different versions of this model have been published, each with slightly different presentation. Use this to guide decisions about where to begin when improving campaign performance.

*If a campaign fails and no one is there to measure it, did it ever really fail?*





## How to optimize?

This is a vastly complex topic, but here are a few thoughts, beginning with **the Campaign Database**.

If your campaign underperforms, look at your response data. If you've sent email, what are the bounce rates and unsubscribes? High bounce rates imply a poor quality list. Unsubscribe rates (anything above .05% is high) indicate that your list did not find your content to be relevant – an indication you're not reaching the right contacts.

A quick test, if you have telemarketing resources available, is to pull a random sample from the list and begin calling them. Your telemarketers can tell you quickly whether the list is good or bad.

**Vehicle testing** begins with a comparison of response to different vehicles. Do you have enough of your target audience in your list to yield an acceptable result?

| Primary Campaign Variables | Performance Uplift Potential |
|----------------------------|------------------------------|
| List                       | 35%                          |
| Offer                      | 30%                          |
| Vehicle                    | 20%                          |
| Creative                   | 15%                          |

Campaign **offer and creative variables** can be tested via simple A/B splits as I describe on the following pages for Maxim #10.



## Is it better to be efficient or effective?

Both, of course. But address each in its proper turn.

Your campaign's first priority is to achieve its business objectives. And achieving target performance against efficiency metrics – such as cost-per-lead (CPL) – is not a business objective. CPL is simply an optimization metric designed to guide campaigns towards greater cost efficiency.

Avoid the CPL trap! Don't optimize campaigns until they've demonstrated that they're nicely on track towards achieving your goals.

And don't optimize a broken campaign: that is, a campaign that isn't remotely on track for success. Either overhaul it, or discard it.



*“I beseech thee!  
Send cheaper leads!”*



MAXIM  
# 10

# The Campaign Is Master

**Campaigns are complex and time-consuming, so please never forgo the opportunity to learn from them.**

An A/B split is one of the simplest ways to learn from campaign execution. By splitting your database into randomly distributed Control, A and B groups as shown below, you can perform quick and simple tests for subject lines, messages, creative design, and the all-important offer. (But don't test too many variables at once!) Testing is easy – especially when it's done as a matter of course. But it requires patience and discipline.



***Beware the direction:***

“Let's hit 'em all!  
There's no time for that  
extravagant testing.  
Our entire company's  
future depends on you  
launching that email  
NOW!” \*

Campaign Database  
 $n = 10,000$

Control  
 $n = 1,000$

Group A  
 $n = 4,500$

Group B  
 $n = 4,500$

\*This statement, if meant literally, is generally a good sign that it's time to look for a new company.

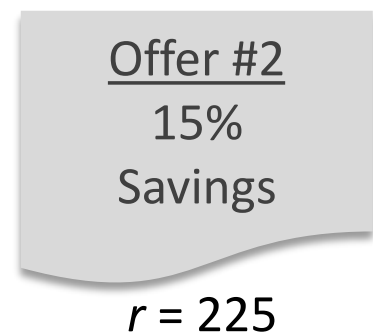
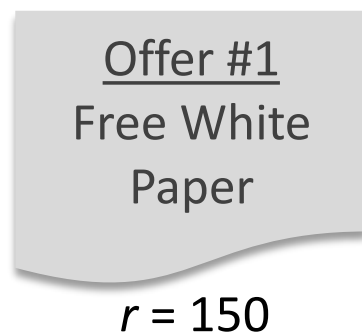
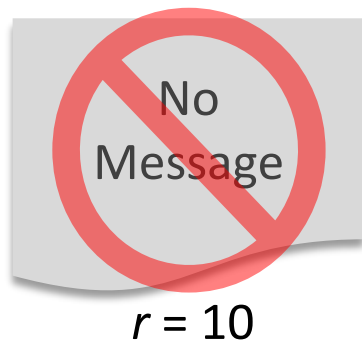
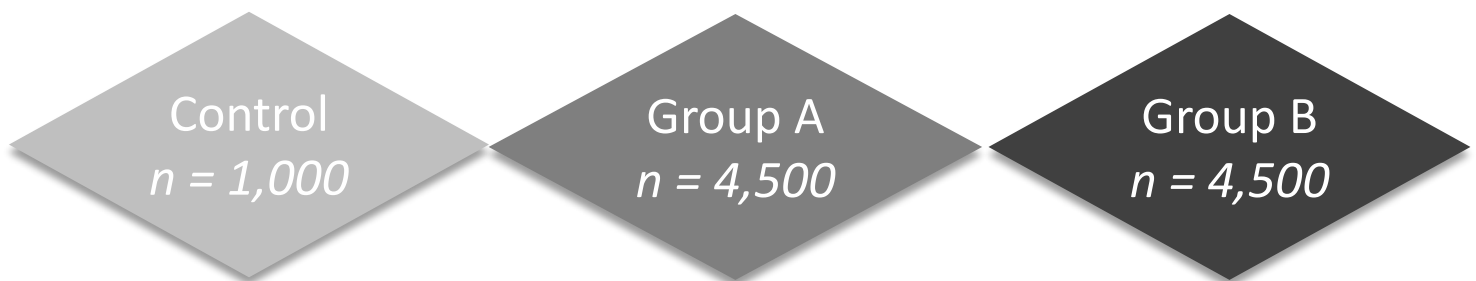




MAXIM  
# 10

# The Campaign Is Master

In this example of a simple A/B split, we learn that Offer #2, a 15% discount, has generated a 5% response vs. 3% for Offer #1. This is a significant performance difference that should certainly affect future campaign tactics.







MAXIM

# 11

# Be the Campaign.

## Yes, it is certainly time for your campaigns to socialize.

Prior to the advent of social media, it was neither scalable nor efficient for campaigns to focus on influencing *individual* members of their target audiences. Hence, campaign tactics were aimed at individuals only to the extent that they matched the personae of the buyer.



The first step in changing this model was the advent of direct marketing over 50 years ago. Then, at least, marketers had a means of addressing their audience members by name and, over time, with additional database-resident personal information.

Today, social media tactics allow campaigners to address individuals without a database. With social media sites and systems, we can track individuals, influence them across multiple vectors, and engage them in person-to-person (not just company-to-person) dialogs.

This is uniquely powerful. But it means that social media are deconstructing traditional B2B dialogs, altering forever the fundamentals of campaigns in ways that even this grizzled campaigner cannot imagine.

But for now, social media tactics can directly generate leads for the B2B enterprise. For your next webinar, for example, ask your fellow employees to post an update to their LinkedIn audiences, linking to a campaign landing page. This simple, no-cost tactic can drive immediate, tangible results.



MAXIM

# 11

# Be the Campaign.

## And don't stop there.

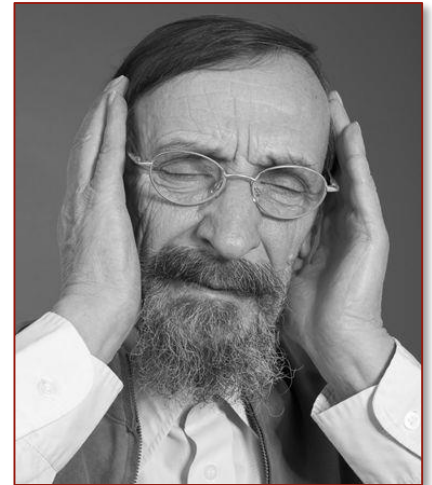
For eons, many have slaved invisibly behind the scenes to craft, build, launch and execute campaigns. Now these unheralded heroes of commerce can and must emerge from their cubicles.

If you are proud of your campaigns, *speak* of that pride.

If you love your campaigns, you must *share* that love.

And now you can.

I encourage you to become a regular promoter of your campaigns (and, by doing so, of your career) by engaging your personal network through social media.



*be the campaign*  
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*be the campaign*  
*be the campaign*  
*be the campaign*



MAXIM

# 11

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## Why should you bother?

After all, you say, my network consists of other marketers, lots of headhunters and people I know from work. They're hardly in my target audience.

**Good campaigners are rarer than you think.**

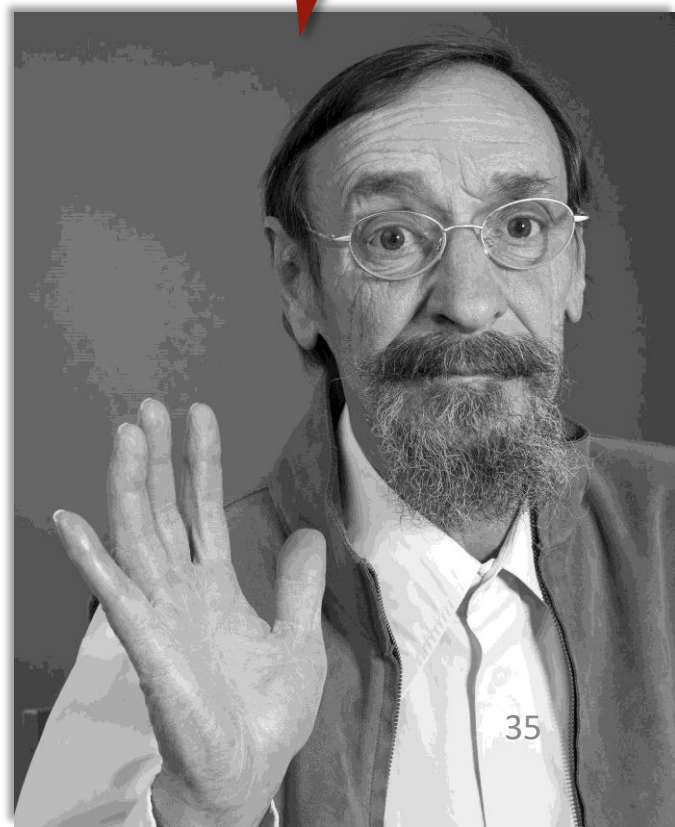
**And much in demand.**

If you, too, are a campaigner, do your career and our profession a favor. Raise your profile. Go public with your achievements and your campaigns. Tell the world what you labor so long and hard to produce. Someone will be watching.

And even if no one else does, I assure you ... Greysmoke cares.

### Hey Network!

Sorry I've been so quiet lately, but I've been crunching like mad. I just launched this killer new campaign. Please check it out and tell me what you think.



# About Greysmoke.

**Greysmoke is an icon in the world of business-to-business marketing.**

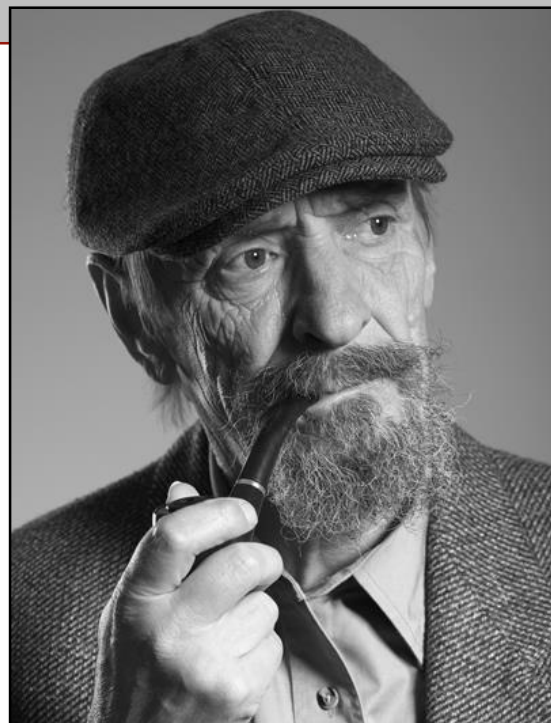
Literally. He's a symbol, not a real person.

Greysmoke is the more outspoken persona of a real marketing professional with a deep background and long-running career in the marketing of technology products, services and solutions.

Greysmoke's alter-ego has held leadership roles encompassing global demand generation, regional marketing, marketing communications, creative services, marketing information systems, database marketing and marketing intelligence.

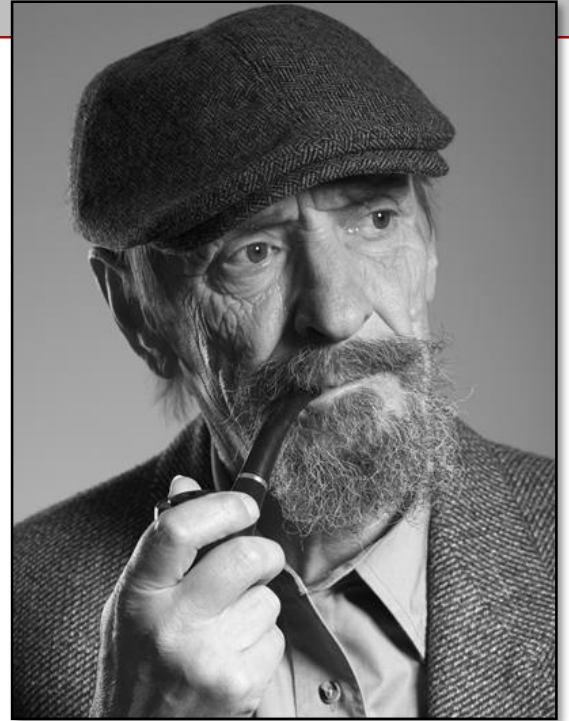
With experience from industry leaders as well as emerging, turnaround and revitalized companies, he has dealt with the needs of business-to-business organizations at many scales and stages of maturity.

The photograph isn't the "real" Greysmoke, it's a royalty-free image. However, the real Greysmoke loves your feedback. Contact him at [Greysmoke@Outlook.com](mailto:Greysmoke@Outlook.com). Or pay him a visit at [About.Me/Greysmoke](http://About.Me/Greysmoke).



Greysmoke wishes to acknowledge his everlasting indebtedness to the numerous corporate colleagues, agency professionals, strategy consultants and others who have helped him, through hard-earned experience, to formulate the 11 maxims presented here. The list of such wonderful people is far too lengthy to recreate.

Greysmoke thanks you all.



**“Because campaigns are cool.”**

— Greysmoke