

DRIFT PRESS

CMO Secrets Revealed

13 Marketing Leaders Share Secrets That Will Change How You Market Today

2ND EDITION
**ALL NEW
CONTENT**



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Introduction

The best way to learn is by talking to people.

Scratch that — the best way to do *anything* is by talking to people.

Talk to customers. Talk to colleagues. Talk to people in your industry, including competitors. Find out what they care about, what they're struggling with, and what they're doing to get better.

Over the past couple years, we've been lucky enough to talk to some of the brightest minds in marketing. These are people who've literally written the book on brand and growth marketing, from data to storytelling and everything in between.

In this book, we're sharing the lessons we've learned from CMOs and marketing trailblazers featured as special guests on our podcasts. Within each chapter, we'll let you in on their marketing secrets — and share links to their full episodes for even more insights.

SECRET #1

Use Storytelling to Empower Sales with Mike Troiano



Mike Troiano



Partner, G20 Ventures

Great companies are built on the backs of great products, and great products are built on the backs of customers. Great marketers know this, but not every salesperson does.

Selling well requires two skills: empathy and persistence. Customers don't like salespeople for two reasons: salespeople don't understand their problems, and in

the words of [Mike Troiano](#), AKA the godfather of brand, “they don’t fucking listen.”

According to Mike, the most important thing marketing does is enhance the productivity of sales. And there’s no better way to do that than to empower the sales team with the tools and context needed to solve a customer’s problems.

We’re both big fans of Simon Sinek. And his idea of “[start with why](#)” has always been fundamental to the way I approach marketing and communication. With a salesperson, you have to give them the tools to understand the challenges their customers are dealing with. Then, give them a set of discovery questions that enable them to surface those challenges. [You have to] help them to walk the customer through the negative consequences of those technical challenges, and paint the positive business outcomes that would come from a better way. Once you’ve done that, then you can start to define: what are the technical requirements required to realize that rosy picture?

– Mike Troiano

During his conversation with us, Mike shared one of his favorite quotes from French writer Antoine de Saint-Exupéry: “If you want to build a ship, don’t drum up people to collect wood and don’t assign them tasks and work, but rather teach them to long for the endless immensity of the sea.”

In other words, if you want to change someone’s behavior, you have to change how they feel, not just how they think.

There are few ways to be effective in business that don’t involve influencing the behavior of other people. Good marketers are students of human response. Same with great product people and salespeople. A product is a response to a customer’s need.

Listen here:



SECRET #2

Spend More Time on Hiring with Vidya Peters



Vidya Peters

 CMO, Marqeta

Hiring takes time, resources, and money. So, it's natural to want to get it done quickly. But spending more time on hiring is a critical investment in your company. In fact, the ability to hire the right people at the right time is key to scaling your marketing team.

Vidya Peters, the CMO of industry-disruptor Marqeta – a global card issuing and payment processing company in the world's first open API platform – agrees. “Who you have on your team is 80% of the job. I think the lion's share of your time should be spent on hiring,” she says.

She has three questions she asks herself when choosing candidates:

1. Is this person smart and intellectually curious?

I don't mean smart in grades, but do they connect the dots? Do they ask you thoughtful questions? Not the standard questions that they wrote down, but do they truly care about the business? About the industry? About the problem you're solving? About the customer that you're serving? And are they able to make connections in a way that shows that they're really driven about finding the answer to that problem?

2. Have they stayed in one job for a while?

It's really important to me – and this could be controversial – that they haven't hopped jobs every couple of years. Here's why: You make certain bets and you put them down. And the actual payout for many of those bets happens from 18 to 36 months. So, when someone is leaving jobs every two years, the question for me is do they stay long enough to actually see their work through? That's an indication of grit to me.

Who you have on your team is 80% of the job. I think the lion's share of your time should be spent on hiring.

– Vidya Peters, CMO at Marqeta

3. Can they prove their impact?

That's great that they're smart, that they're connecting the dots, that they're staying in the role long enough to actually see what's working and what's not. But were they successful? Did they get more responsibility? Can they talk to me about the impact they had, rather than just the activities that they ran?

If you want to disrupt an industry, an experienced team isn't enough. That's why choosing the right people is key. "If you are trying to solve an age-old problem in a whole new way, you can't bring the old solution-makers to the space," says Vidya. The right mindset and the right attitude are important factors. Everything else can be taught. It may take more time, but building your dream team is worth it.

Listen here:



Learn How to Hire and Inspire Marketing Teams

Discover what it takes to design, hire, and inspire high-performance marketing teams with tactical best practices and actionable templates in our book *Winning as a Marketing Leader*.

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SECRET #3

Listen First, Strategize Second with Katharine Mobley



Katharine Mobley

 CMO, First Advantage

So much of marketing is about storytelling. But an important part of any marketing strategy is listening, especially when you're new to a company.

Kat Mobley, the CMO of First Advantage, uses a “listen first, strategize second” approach whenever she first joins a company.

I tell everybody when I get there, ‘I’m going to be quiet. It’s going to make you a little unnerved for a while. Because I’m here to listen so that I can build a plan and implement it.’ So for six weeks I just listen to everybody – from all the key stakeholders in leadership to customer success, and sales. I want to learn about all the different challenges that we’ve had, and dig into all the data. Sitting and listening to people lets me build a better marketing plan more quickly.

– Kat Mobley

Starting with an internal approach allowed Kat to establish trust and get buy-in for her marketing vision, and build a case for what she wanted to do next. Once you’re well versed, you can turn your sights on external stakeholders.

Just make sure this period of quiet reflection is not just focused on the good, because so much can be learned from past mistakes and experiments.

As Kat says, you don’t know how to fix a brand until you find out what it’s done wrong previously – no matter how much marketing experience you have.

Listen here:



Align Marketers Around Strategies with Integrated Marketing Campaigns

Want to learn how companies like Drift and Asana run marketing? Check out *The Integrated Marketing Campaign Toolkit*.

[GET THE GUIDE](#)

SECRET #4

Give Your Team Their Time Back with Lynne Capozzi



Lynne Capozzi

 CMO, Acquia

Because marketing departments answer to everyone, it's easy for your team to get bogged down in meetings and details. But as a leader, you can give your team something priceless: uninterrupted time.

Early on, [Lynne Capozzi](#), the CMO of Acquia, created a ritual for her department that helps everyone align on goals, clear their plates, and say no to meetings that could be emails.

I call it marketing scrum week. I tell the company, ‘We are in marketing scrum week, we are heads down with the following list of tasks.’ I give my team permission not to attend meetings. First, we do planning during that week; Second, we put together a list of tasks that we want to complete, and we cheer each other on. It really energizes people because it gives them their time back. It also makes everyone sit in self-reflection and say, ‘Do I really need to be in that meeting going forward?’

– Lynne Capozzi

A ritual like this is a chance to not only sprint on your objectives, but demonstrate to employees that you want their best work – and you’ll clear pathways to get it.

Sometimes we have such big calendars in front of us, and we just autopilot through our calendars. Having that time to just really strategize and think about how you want to spend your time is equally as important.

Of course, setting the stage for your employees can’t come at the expense of other departments. This kind of exercise needs to be planned with company success in mind. For instance, Lynne knows the last month of the quarter is crucial for sales. So it’s not a good time for her team to go offline. She always chooses a week in the second month of the quarter to balance everyone’s needs.

But prioritizing that planning time and giving your employees a bit of breathing room can yield results that another week of meetings never could.

Listen here:



SECRET #5

Experiment All the Time with Carol Meyers



Carol Meyers



Partner, Glasswing Ventures

Marketing is always changing, and there are no silver bullets. What worked yesterday might not work tomorrow, and the thing you thought would never work in a million years – that might be the campaign you're telling your grandkids about years from now.

Carol Meyers – a veteran of four IPOs – says the only thing evergreen in marketing is the need to know your customer. You have to understand them and what you have to offer them, and then you have to work like hell to find the right tactics to get that message out there.

It's important to always be **experimenting**. Don't worry about making mistakes. In Carol's experience, the big mistakes are less about what you did, and more about what you didn't do.

We try to do experiments all the time. Someone will propose something and my first reaction might be, 'Are you kidding me? That'll never work.' But I try to hold that in and suspend disbelief because I really don't know everything. And things I've done in the past that have worked don't always work at a new company and in a new market.

So I usually think about, well, okay, what's the biggest risk that could happen if we spend this money and it doesn't work? Probably nothing bad. So go ahead and try it, let's come back and talk about how it went. Sometimes people surprise me with things that I thought, there's no way that's going to work, and they work beautifully.

– Carol Meyers

Carol says that as a marketing leader there's nothing more important than hiring well. And a huge part of hiring well is finding people with urgency around their ideas.

Encourage your team to share their ideas and make sure they feel comfortable doing it. If they bring an idea to the table, ask them why they want to try it, why it's good for the market, and what the impact is going to be. Have a conversation about it and try to go deeper.

And if it sounds like an interesting idea – try it.

Listen here:



SECRET #6

People Have to Like You with Janine Pelosi



Janine Pelosi

 CMO, Zoom

Don't forget: you're selling to people. No matter who you are or what your product is, no matter whether your customer is a CEO or an IT manager or someone in marketing, these are real people. And people don't do business with people they don't like.

A lot of marketers get carried away trying to create the world's best brand. They get caught up in colors and positioning and messaging, and they lose sight of the

most important factor – people have to like your brand. If people like you, they'll buy from you, and they'll tell their friends about you. **Word of mouth** is incredibly powerful.

Janine Pelosi, the CMO of **Zoom**, is a maven of brand marketing. She talks about the importance of third-party validation. So much of Zoom's success has been built on word of mouth. In a world where every company is saying the same thing about their product, you need to get customers to like your brand so that they'll spread your message for you.

Early on at Zoom, we were going to be doing things differently. We're a little bit more old school. We want to bring our customers to the forefront. When I came here, I kept hearing, "Zoom, it just doesn't suck." So we ended up putting "Video conferencing that doesn't suck" on a bunch of billboards all over Silicon Valley, right? Up and down the 101, you're going to hear it on the radio, the sides of buses, you name it. And it really resonated with people.

Now, fast forward a couple of years, we kind of have the opposite. We have "Meet happy," which people just love, and that kind of came out of a very interesting political climate. There are just lots of hard things going on in the world, and we wanted a happy message. Bringing in a great, happy message at the end of the day, really resonated with folks.

– Janine Pelosi

Everybody has an experience with your brand. Every touchpoint, every tweet, every purchase, every moment. A customer's experience with your brand will dictate whether they keep using their product and whether they'll tell their friends or peers.

Word of mouth is still the best marketing strategy. And customer experience is the new demand generation. Make sure customers are happy. Because, as we'll explain in the next chapter – your business depends on it.

Listen here:



SECRET #7

Smart, Happy Customers Buy More with Sydney Sloan



Sydney Sloan



CMO, Salesloft

If you don't have customers, you don't have anything. That's why a customer-first business model will never steer you wrong. In this model, you're not just concerned about keeping your buyers happy. But keeping your existing customers smart and happy too. Both are vital to increasing your customer lifetime value and revenue.

Sydney Sloan, the CMO of SalesLoft has made this her mantra. She knows having a customer strategy that puts customers at the center is everything when it comes to marketing. Part of that strategy – creating smart customers – doesn't just serve your clients, it also keeps your team honest.

Our sense of urgency doesn't constitute urgency for our customers to buy. You have to educate your customer. You have to educate them on all of the programs that you put in place. And that means partnering with the training organization or targeting admins on how to get them certified or improve end-user adoption of a platform. You can't just implement, onboard, and walk away. It has to be an ongoing relationship.

– Sydney Sloan

And one of the best ways to plan for that ongoing relationship – creating happy customers – is mapping out a customer journey that extends past purchase. Sydney's favorite place to start is the first 90 days.

I'm a big fan of customer journeys. And I believe marketing should understand our prospects and customers more than anyone else in the business. This means you have to think of your existing customers differently than your prospects. In both cases, we identify personas. [With buyers] we know who we're targeting to try and make them a customer. You have to do the same thing with your existing customers. In the onboarding phase, the people that actually bought the product are probably not your primary contacts moving forward. So you also need to create personas and roles for those existing customers.

Once you win someone's business, change your mindset: you're not marketing to them anymore, you're communicating and listening. Sydney is a big fan of peer review sites where you can read valuable input straight from your customers. There you can figure out what your customers like, and what they wish your product did better.

And because you educated your customers, and communicated to them long after they purchased, you've earned yourself a loyal base that will continue to buy, and help you improve. Making customers smart and happy will validate that they chose the right partner.

Listen here:



The State of B2B Buyer and Customer Experience

Drift and CustomerGauge surveyed 100+ B2B businesses on the state of buyer and customer experience. Discover where you stand and get best practices here.

[READ THE REPORT](#)

SECRET #8

Feedback is the Secret Sauce with Leela Srinivasan



Leela Srinivasan

 CMO, Momentive

Talking to customers is important – but so is listening. The better understanding you have of your customer's world, the better decisions you can make around just about everything.

Think about the last decision you made around messaging. Who wrote the copy? Did you know if it would resonate with customers? What if you could validate it with customer feedback? What if the copy itself came directly from customer feedback?

[Leela Srinivasan](#), CMO of Momentive, gave us a master class in customer feedback. She says marketing is all about your proximity to customers. She encourages marketers to think of customer feedback as the ultimate data enrichment.

Use customer feedback to inform your biggest messaging decisions. Leverage customer feedback for surprise and delight. Listen closely for specific details – that’s how to surprise and delight later on. Turn customer feedback into attention-getting, lead-generating content. Use customer feedback to make better decisions around pricing and packaging.

I’ve used customer feedback as an important input into how we’re thinking about packaging and pricing. This includes designing packages from scratch, based on an individual’s willingness to pay for certain features, to running qualitative research with decision-makers. And having them react in real-time to different price points, using Van Westendorp and all these other conventions to make sure we have as much input as possible in that final price. You can really shoot yourself in the foot if you go-to-market with something that doesn’t have the features people will pay for, or that it is priced incorrectly.

– Leela Srinivasan

Input from customers can help you make better marketing decisions across the board. It can help you create what Leela calls a “virtuous customer acquisition cycle” and amass a following of devoted fans.

Even the smartest marketers in the world can’t do it on their own. You need to listen to your customers and use their feedback to workshop your ideas. At a minimum, they’ll tell you what is and isn’t working. And on a good day, they’ll be the ones making decisions for you and giving you great ideas.

Listen here:



SECRET #9

Don't Overcomplicate with Technology with Brian Kardon



Brian Kardon

 CMO, InVision

A lot of marketers get carried away with tools and technology. It's tempting to want to integrate and create the world's **best MarTech stack**. And it's true that a good tech stack can do amazing things not just your marketing team, but everyone in the company.

But there are downsides to overusing technology. One is that it can overshadow “real” skills and create blind spots in your company. Another is that tools and software aren't used the same way by everyone.

Brian Kardon, CMO at InVision and former CMO at Fuze, talked to us about the importance of not overcomplicating with technology, especially when it comes to sales enablement. Remember that the average BDR is often a kid straight out of school. You can give them the world's most advanced dashboard – with every metric under the sun – but chances are they won't know half of what they're looking at.

Brian takes time to sit down with BDRs while they work. Not in a controlling way – he just wants to observe what tools they use and how they prioritize the instructions given. He says it's important to simplify things as much as possible.

I just want to watch and see how you sit. And I realized that they're not prioritizing things properly. They're being pulled in a billion directions from the salespeople that they report to. We had about a 3:1 ratio at Fuze, one BDR for three sales reps. The sales reps say to focus on these accounts, and they're being distracted all the time. The priorities are always changing. So BDRs needed a true north. So most of my time now is spent on the integration between sales and marketing – not on the technology. In fact, I find most CMOs have put in too much marketing technology that they're not using.

– Brian Kardon

A technology audit can help you understand which tools are being used and which ones haven't been touched in months. Efficiency should be the goal of every CMO, so try to do this a few times a year and determine what's necessary.

In some cases, if a tool is underutilized, it might not be that it's unnecessary – it might be that it just wasn't deployed properly or at the right time. The “choke point” – as Brian describes it is – usually the sales team. They can only handle so many new things. Be conscious of that fact as you build your tech stack, and make sure you're not overcomplicating with technology.

Listen here:



SECRET #10

Become a Product Expert with Carol Carpenter



Carol Carpenter

 CMO, VMware

How deep does your product knowledge go? As a marketer, it's not enough to be an expert in storytelling and SEO – you have to become an expert in what you're selling. If you work in tech and SaaS especially, you should know the details almost as well as an engineer.

Carol Carpenter is the CMO of VMware, and formerly a product manager at Apple. She quickly learned that, in the tech world, credibility comes from comprehension. The more she learned about a product, the more effectively – and passionately – she could sell it. bring to customers.

You have to have some affinity and passion for the actual products and services. You have to care and you have to have enough interest. My advice to marketers is, while it's amazing to be an expert in demand gen, in content syndication, in social media, what will really makes you a superhero is a deeper understanding of what [your] products actually do and the value they bring to customers.

– Carol Carpenter

Getting to know your product and services on that deeper level takes some legwork. If the questions aren't directly related to your job, don't expect the answers to come to you.

The DNA of the company is so steeped in engineering that there are only a few ways to gain credibility. You can have incredible market knowledge, you can have deep customer insight, and hopefully a little bit of product acumen. If you can marry all of that, you can influence and make change happen.

If you have the right information, you can educate your customers and the industry. Having both inbound and outbound experience gives you a more holistic view of what you're selling – and better plan a strategy moving forward.

Listen here:



SECRET #11

Product Marketing is a Job for Humans with Dan Rogers



Dan Rogers



President, GTM Operations, Rubrik

Good product marketing is hugely important. It's how product and marketing teams learn to understand their customers and speak to them on their level. And yet, as **Dan Rogers** points out, it's easy to tell when an enterprise company doesn't have good product marketing.

The biggest red flag? When marketing starts sounding a lot less...human.

Good product marketers are experts in human connection. They're pros at taking technical ideas and turning them into messaging. They understand customer experience and know how customers speak and want to be spoken to.

Product marketers should be integrated into the development process early on. They should be deeply embedded so that they understand the product roadmap and know what customers want. They act as a bridge between product and marketing – and your customers.

I think a product marketer's job, number one, is how does the decision-maker talk? What do they care about? Who are they? And spending time with them. And really, no product marketing can be inside-out, it all has to be outside-in. You'll find the words in the customers' mouths.

– Dan Rogers

ServiceNow, where I was formerly CMO, has an amazing ADR organization. They singularly have a gift to express in a minute what others take 10 minutes to express. They learn – it's almost like water going down the river, it kind of figures out the way between the rocks. The ADRs learn that very quickly. This is the way between the rocks. And if I could only say 20 words, what are the most effective 20 words I could say?

Let your product marketers get to know the customer and build that bridge. The more you can enter into the world of the buyer and the things they're struggling with, the better.

Listen here:



Understanding the Role of Product Marketing

Product marketing is one of the most misunderstood marketing professions out there. Learn more about this role and their importance to your business.

[READ THE BLOG](#)

SECRET #12

Messaging is Everything with Scott Holden

**Scott Holden**

CMO, ThoughtSpot

No matter what you're selling, the right messaging wins customers. Messaging brings your products and services to life. It differentiates you from your competition.

Scott Holden is the CMO of ThoughtSpot, a leader in search and AI-driven analytics. He considers himself a “messaging freak.” To him, no matter how big or

small a message is, it all adds up to represent your brand – so you have to get it right every time.

The question, ‘What's the message?’ doesn't just apply to a product launch or a new feature, it applies to everything. You have to be thinking about every little piece. With every ounce of real estate, every word you're putting out into the universe as a marketer, there's a message behind it. As a marketer today, you have to obsess over your differentiation and your story. And there's nothing more important than getting that right and making sure that it sticks out relative to your competition.

– Scott Holden

Scott urges marketers not to get comfortable with what they know. At the same time, chasing trends might help you ride a wave, but it needs to serve your message to be effective. When everything is in service of the message, your work always serves the brand.

By chasing trends, businesses end up confusing their buyers. I would encourage people to stay the course, particularly if you do the good work in the beginning to nail it. You always want to be refining, but don't feel the need to jump on the newest bandwagon, especially if it's not core to who you are. The temptation is always there, but you have to be true to why you're great and why you're different.

Getting clear on your message from the start will make it easier to decide what moves to make. This is also some of the most fun and creative work you can do as a marketer, so don't rush through it. Do it right, and have fun.

Listen here:



SECRET #13

It All Comes Back to Storytelling with Andy Raskin



Andy Raskin



Strategic Narrative Advisor

All great marketing begins and ends with great **storytelling**. Stories are how you captivate your audience and get your message across. They're what stick in customers' minds when they make buying decisions, and when they use your product and tell their friends.

Andy Raskin, the storytelling genius behind “**The Greatest Sales Deck I’ve Ever Seen**,” says to start each story with a big, undeniable change happening in the world. Make it impossible to turn away from – if you look away, you risk falling behind.

The next step is laying out the stakes. Show that there will be winners and losers. Show that there are already winners and losers, and that the winners are adapting – if you don’t adapt now, you’re on the road to losing.

Then, tease the promised land. Show customers the path, and show them what’s getting in the way of that. Show them the obstacles. It’s important that the promised land isn’t easy to get to. It has to be hard, because otherwise why would your customers need you?

Now we have their attention, they see the stakes, and the next thing they want to know is, “Well, what’s it going to take to win? What does it take to be one of these winners?” All of this has a real analog and movie structure, that’s where I learned about all this stuff. I was pitching a company and it was going really badly until I found this screenwriting book. You think about all the great movies — Star Wars, of course, is a good one because a lot of people have seen it — in that movie, it’s destroying the Death Star. In other movies, it’s something else.

Can you do what I call “tease the promised land,” meaning, give a glimpse of it. This functions as both a gold state for the customer, but also a commitment from the company like, “This is what we’re going to get you to.” In this way, I really see this as the mission statement, but it’s the mission statement from the customer’s point of view versus some kind of self-centered thing.

– Andy Raskin

Once you’ve teased the promised land, summarize the obstacles and show customers how you can help them overcome them. Then show examples and give proof.

The evidence is important — it's how you prove to customers that you can help make the story come true. The best evidence is stories about customers you've already gotten to the promised land. But don't call them case studies. Find a more exciting way to use those stories.

Good storytelling isn't about selling solutions or trying to be the "best." It's about selling a sense of belonging to a group of believers who believe in the story you're telling.

Listen here:



Final Thoughts

This is only a fraction of the insights we've gained from talking to CMOs and marketing leaders over the past couple of years. For more insights, check out the Drift Podcast Network.

