



decision *triggers*
Moving Customers to Yes

How Advantage-Makers
Achieve Breakthrough Results
with Smaller Budgets





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Your marketing budget has been cut by 30%. Your revenue target has not. And your management team wants to see you either become part of the answer or part of the cost reduction. Thankfully, you haven't left your homework for the last minute. You begin with a solid idea to sell your newest product to 100 C-Level decision makers, driving a top-down enterprise adoption campaign. Experience tells you that campaigns of this sort average around a 2% return. But in this economic climate, average returns aren't enough. By thoroughly re-engineering your campaign using the best applications of Advantage-Making strategies and social psychology, your results come in at 33% – all in a disastrous economic environment, when customers aren't supposed to be buying.

Sound impossible? This isn't a business fable. The two of us, Stephen Denny and Dr. Steven Feinberg, filled the biggest whiteboard Quartet makes with a detailed analysis of how we could bring best practices in business psychology to bear on a difficult business problem, one as the business unit lead and the other as the influence strategist & business psychologist. In the process, we uncovered options that most people don't even know exist.

We can't fault marketers for failing to put these Advantage-Making practices to use when so few have been trained to think in this way. Dr. Feinberg's 25 years of research into the dynamics of what makes some leaders succeed in the face of constraints where their peers become stuck has led to his discovery of a core set of "invisibles" – the practices that successful leaders use to overcome obstacles that typically stall most managers. These practitioners – let's call them Advantage-Makers – leverage the hidden forces of time, interactions, perceptions and structures.¹ Advantage-Makers interact with the world differently. They strategically shift their position to leverage these invisibles. Anyone's successes – and failures – are due to more than just the surface issues of talent and know-how. The invisibles are usually the difference between winning and losing.

We didn't accept the conventional wisdom that our program should garner a 2% response rate. We thought our message was important enough to warrant a much larger response, if only we could get our message across effectively. We didn't accept the usual way of interacting with customers so we changed the game and achieved a 33% response rate. The invisible first step, therefore, is to question the givens.

Why is it so Hard to Get Your Message Heard?

To answer this question, put yourself in your target market's shoes for a moment. We're all busy, we're inundated with unsolicited messages, and our brains are hard wired for survival. Mental 'gate-keepers' stop what is perceived as unnecessary traffic. Our brains prefer efficiency. In the language of social psychology, we 'satisfice'², meaning we choose the first satisfactory solution that comes to mind and then we quickly move on. But this doesn't always work to our advantage.

How do we use this naturally occurring bit of neuropsychology to our advantage? While most marketers focus on winning at the logical conscious level, the real decisions are being made out of sight, deep in

¹ Dr. Steven Feinberg, "The Advantage-Makers: How Exceptional Leaders Win by Creating Opportunities Others Don't," Pearson Education, Inc., 2008.

² "Satisficing" is decision-making strategy first coined by Herbert Simon that describes how one quickly selects the first adequate answer deemed to be "good enough."



the emotional brain. The brain's 'gate-keepers' can become our allies when we know how to address them properly. When our brains receive properly delivered overtures they release dopamine, making us feel good. And we want more. And the gates open wide. Address them improperly and we trigger the danger response, with the amygdala firing off warning signals for self preservation. In general terms, we want our prospects' amygdalas working with us, not against us.

Let's look at an example of how Advantage-Making can be implemented in practice.

Advantage-Making in Practice:

Our challenge was to launch a new telecommunications device to C-level executives in Fortune 500 companies in the New York City metropolitan area. The first draft of our campaign relied on getting attention through a high-impact direct mail piece – in this case, a steel safe weighing in at about seventy pounds. We were reasonably confident we'd get our target's attention through creativity alone. Stepping back, however, we saw the first potential problem. Our C-level targets were highly resistant to marketing, had layers of protection around them, and viewed themselves as above "getting sold." Instead of being invited inside the walls, we were planning on a frontal assault. The script for the appointment setting telephone call hinged on the dangerous line, "hello... we want to deliver this BIG SAFE to your boss's office... when can we drop by?"

We realized that if we didn't change the way we managed this 'invisible' interaction, we could expect little more than the average response rate. Here's what we came up with.

Phase #1: The Art of Strategic Shifting

We strategically shift when we move to a commanding vantage point so that we can see what others don't see. Instead of preparing for the frontal assault, we moved along side our target and strove to dovetail our request with our target's goals and objectives, taking them to a place where they knew they wanted to go. In short, we needed to strategically shift our perception of the campaign from, "Let us change how you do what you do" to "Good news! We make doing what you already do more productive."

On the surface, this shift in perception may seem obvious. But the fact is, unless you purposefully shift your perspective and use an Advantage-Maker lens, you may not realize that your carefully planned campaign might be perceived by your target as a zero-sum "us versus them" competition.

This shift in our strategic vision made us re-think several key elements of the campaign, starting with the initial introduction. We wouldn't achieve our objective if we rely on out-witting or overwhelming the first and often most trusted stakeholder in our equation: the decision maker's administrative assistant. Our approach shifted from "when can we drop it off?" to "let's do something together."

Here's our first lesson: Instead of falling victim to 'satisficing' in our campaign creative, which initially called for defeating the administrative assistant, we focused on how to best influence the administrative assistant's perception of us and our request. Here, we turned to the social psychology of persuasion to ethically influence and honestly present our case. This effort is based upon decades of research by many of the world's top social psychologists, including Dr. Robert Cialdini at Arizona State University.³ Building a relationship starts with the principle of **reciprocity**: when we are given

³ Dr. Robert Cialdini, "Influence: Science & Practice," 4th Ed. (Needham Heights, MA: Allyn & Bacon, 2001).



a gift, we feel a sense of obligation to return the favor. Here, we make the first overtures and set up the social contract.

Next, the **liking** principle says we prefer to do business with people who are cooperative. We have to build a relationship with our gatekeeper or we'll be standing outside the gates – we don't want the amygdala to react to fear.

Phase #2: The Difference Between “Me” and “We”

Now that we've shifted our campaign focus, how do we get the assistant on our side?

“Hello... I'd really like to get your advice on something – is now a good time to talk?”

“I'd like your advice,” and, “Is now a good time to talk?” are things seldom asked of assistants. This kind of respect is usually shown only to the executives they are sworn to protect.

“We've been good business partners of your company for years and would like to get a new idea in front of your boss... but we need your help...”

We're not trying to outflank them – we're collaborating. The natural reaction to this kind of statement is to **reciprocate**. If you gave me something, I will give you something.

Second, our conversation pulls the assistant into our camp, from asking for advice to recruiting them to join our efforts. We're showing cooperation and praise, which again signals **liking**. At this point, the dopamine is starting to flow.

The concept of 'we' is also important here. The assistant is now one of 'us,' which means 'we' are no longer 'them,' the ones to be kept outside the gates.

We use the principle of **consistency** here, which states that people feel social pressure to behave consistently with previously stated positions. Our script helped remind her that working with us would simply be consistent with her company's previously stated positions.

“... it's all in good fun, it's not embarrassing at all – no chicken suits, no singing telegrams – but we'd like to deliver a package to him. It's a very small safe. We'll give you the combination and let you see inside of it. It's got a product inside for him to look at – your IT people are already aware of it. “When can we drop by to see you?”

The **contrast phenomenon** tells us that we can manage how anyone perceives anything as long as we can control what they hear first. How big is a safe? It seems like an innocuous question, yet it reveals the Advantage-Maker's thinking that lies at the heart of the campaign. Compared to a chicken suit or a singing telegram, how embarrassing could an office visit be?

What about the choice of a safe in the first place? What characterizes the things we lock away in a safe? Value, exclusivity, rarity, and a host of other meanings signifying worth. The use of a safe to deliver our message triggers the social influence factor of **scarcity**, suggesting that rare or exclusive things are more valuable. We delivered a seventy pound metaphor to people who are in the business of judging worth. We also delivered something **vivid**. Who remembers the last envelope they received? But when a safe appears in your office and your assistant is waiting for you to open it up? That's rare and it sticks.



Phase 3: Helping People See What They Want to See

Our work thus far focused on maximizing the chances that the safe would be placed in the main target's office and our new friend, the assistant, would be prepared to argue our case. Consistency, after all, suggests that she wouldn't easily shrug us off after this much work. Now it's time to get our C-level executive on board.

The first thrust of our campaign lay in the vividness of the delivery and the framing. A safe is an ice breaker. Once this was in place, we moved on to the logical points of our campaign strategy. These hinged on the solution's productivity proof points, new legal requirements that made our product a timely solution, and the first-person experience of the target in evaluating the product.

Our productivity proof points were captured in a study that measured changes in incremental revenue per employee and decreases in the number of sick days taken over the test period. An ergonomic consultancy managed the study and a marketing research firm validated the conclusions. Our study showed that our solution increased productivity by 22%. And yet, even with a bullet proof study, we backed off:

"I can show you third party studies that prove how our product increases productivity and increases revenue... but I think you already get it... you know this works... but don't take our word for it. Cut this number in half. Cut it in half again. And again. I think it's reasonable that if I can prove a productivity improvement of 22%, you could at least agree to a lower number of 2%. What about 1%? Let's settle on this. What would an increase in productivity of 1% do for your company? What would the ROI be?"

The study itself, the presence of the ergonomic consultancy, and the added layer of the marketing research firm's audit all created a backdrop of **authority** and **source credibility** to our pitch: this isn't just us, it's the added weight of "them," and they have credentials.

Why retreat from our findings? Because our goal to not win an argument. Better to anticipate the push back and retreat yourself. Take them to a fallback position of your own choosing where "a reasonable person" would have to agree and win your argument there. The use of the strategic retreat counters the anticipated objection and defuses it before it blows up. This is a form of **authority** – when we argue against our own self-interest and acknowledge a weakness in own case, it builds credibility in the eyes of our target.

We followed with an overview of new legislation that made the program relevant:

"You may have read about the new law that affects you and your employees ... now, even if you think you're doing the right thing by advising your employees to avoid certain high risk actions, you, as their employer, are still at legal risk... and here are three cases where it happened... if you're like most C-level officers, this matters to you..."

By providing them 'hot off the press' information, we trigger the principle of **scarcity**: we value what we perceive to be rare or exclusive.

Another powerful element here is framing our argument in terms of what the target stands to lose, not gain. **Loss based framing**⁴ says that we feel losses more acutely than we do gains.

The brain lights up whenever we speak about others that are similar to ourselves. The C-level

⁴ "Judgment under Uncertainty: Heuristics and Biases," Amos Tversky; Daniel Kahneman, *Science, New Series*, Vol. 185, No. 4157. (Sep. 27, 1974), pp. 1124-1131.



officer's peer group is triggered with, "If you're like most (senior corporate officers who get paid to make good decisions), you'll see what we have presented is valid as they did..." This employs the principle of **source similarity** and **consensus**, which says that under subjective conditions of uncertainty, we look to similar others for guidance.

We ended with an invitation to personally set up the product in the executive's office:

"We're sure this makes good sense, but nothing works quite as well as trying it for yourself. We'll make an appointment to set it up so you can satisfy yourself that our product is as good as we say it is..."

First person experience always wins. Advantage-Makers make their valid arguments **vivid**. We need tactile reinforcement and need to feel that we have made the decision apart from "getting sold."

While our program showcased a number of Advantage-Making practices, the real story was its success. While most direct marketing efforts of this type garnered a response of 2% to 3%, we saw 33% of our efforts leading to a successful meeting. This program spearheaded a company-wide effort that became the company's enterprise marketing strategy to this day. We hand-delivered a seventy-pound closed steel container into the executive suites of companies that made up the alpha level of the US economy in New York City, one month after the World Trade Center was destroyed, when no one was supposed to be buying.

A Further Check:

Throughout the process, we relied on a specific, targeted set of influence strategies. But was it honest? Yes. Each touch point was researched so that we avoided anything that was a potential problem. We checked our CRM records to ensure that each target company was active in our system and had some degree of visible purchases – so when we said, "we've been happy suppliers to you for years," we meant it. We were prepared to quickly remove ourselves and the safe if we were asked to do so (in one instance, we did). And we sent senior sales people to the C-level executive's office to make sure the system worked perfectly and they received the experience we wanted them to have. This also began the relationship which we grew to implement our larger strategy.

What Do You Do Now?

If your take away is that we were successful because we made friends with the assistant, then we've understated the power of the "invisibles." The campaign worked because we played to the forces affecting the key players themselves as well as the structures that they live and work in. Using naturally available decision triggers allowed us to be invited inside the walls instead of having to overwhelm them.

How do you put this to work? Here are five things to think about:

1. Start with an Advantage-Maker mind-set. Ask yourself what you could be missing. How can you change the game to create higher quality results faster?
2. Focus on shifting interactions. Advantage-Makers are keenly aware of skillfully leveraging personal interactions.



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3. The social effects of persuasion are hard-wired into our DNA. The dopamine response and amygdala are always ready to respond to social influences. We also used 7 decision triggers of social psychology: contrast, reciprocity, liking, scarcity, consistency, source similarity and authority. With the proper application of the social psychology of influence, you can trigger the “Yes” response more often. Small influences have huge consequences.
4. Use contrast to frame your request. Who says a 70 lb. safe is big? The contrast phenomenon tells us that we can strongly influence how anyone perceives anything – so long as we control what they hear first. Show your customer the right comparisons and help them understand your value.
5. Peel back the layers of your programs and see how each touch point can be re-engineered to maximize your program’s success. Finishing well means taking your program apart and ensuring that nothing is left to resolve itself. Ask yourself “OK, so what happens next?” What happens after we leave? What happens after they’ve got a week’s worth of experience under their belts? What happens when they hire new people?

Going Forward:

In this economic and business climate, no one can afford average results. Incremental sales won’t come from incremental budget allocations. They will need to come from breakthrough thinking. What’s more important is that everyone is looking for ways to achieve this breakthrough: the CEO wants greater efficiency and growth, the CFO wants the best possible returns for scarce resources being allocated, and the CMO wants to know that a dollar spent in one medium will return more to the company than a dollar spent elsewhere.

Things have changed – in our companies and in our economic climate – and we can’t rely on doing things the way we used to and expect the results to be like they were. The art of strategic shifting that Advantage-Makers use shows the power of changing your vantage point to see the invisibles that others miss.

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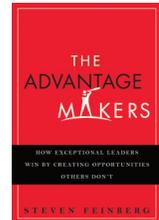
For over 30 years, Feinberg has applied the study of human behavior to advantage-making. Advising senior executives on influence, customer engagement, leadership, team, and organizational issues, with an emphasis on advantage-making: how to shift the odds in your favor to maximize opportunities.

As President of Steven Feinberg, Inc., he has designed programs that have increased leaders individual influence, turned around ailing organizations, teams, and leaders in tough spots to generate millions in profitability. His client list ranges from Fortune 500 firms to Entrepreneurial Start-Ups, including Wells Fargo, Visa, Symantec, Sun Microsystems, Plantronics, Cadence, HBO & Co., BEA Systems, Synopsys, NVidia, Pac Bell, Xilinx, Affymax, FirstRain, Satmatix etc.

For twenty-five years, Steven has taught courses on leadership and organizational effectiveness in the University of San Francisco's Department of Organizational Behavior and Leadership, and is a guest lecturer at Cal Poly and Stanford. Steven gives keynote speeches on the Secret Code of the Great Advantage-Makers, including speaking at the ANA Annual Conference for Masters of Marketing. He has spoken and taught influence programs internationally.

He graduated magna cum laude from the State University of New York at Buffalo, received an MSW from Tulane University, and holds a PhD from the Professional School of Psychology, San Francisco, CA.

For Steven, "getting influence right" means acting as an Advantage-Maker.



Stephen Denny

Denny helps clients define their brand positioning, develop robust messaging strategies, drive demand and fully engage their channels. Prior to consulting, Denny spent over twenty years as a senior manager at some of the premier brands in the technology world, including Sony, OnStar, Iomega and Plantronics. Denny has deep experience in both B2B and B2C marketing and has been recognized as a highly creative, "out of the box" strategist.



Denny also teaches a two-day seminar on Marketing Innovation – the Principles of Persuasion Workshop, based on the research of Dr. Robert Cialdini, to corporate clients who need to apply the social psychology of influence and persuasion to their internal cultures and external communications.

Denny has lived and worked in the US and Japan, holds multiple patents, has lectured at top graduate schools and industry forums, and has an MBA from the Wharton School. He is a frequent contributing editor to *The Daily Fix* and *Marketing Profs*, the *CMO Council's Marketing Magnified*, and *Chief Marketer*. He also authors the marketing blog, *Note to CMO*.