

LETTERS FROM THE CORNER OFFICE, 2024



Foreword and Introduction

Hi friends!

Welcome to my corner of insights and reflections. One thing I firmly believe in is creating content that keeps on giving. When we pour our hearts and souls into creating something meaningful, it should continue delivering value in new and unexpected ways.

That's exactly what this collection represents. It's a carefully curated bundle of thoughts, musings, and yes, maybe a few chuckles, all designed to give you a fresh perspective on the whirlwind that was 2024. These letters were originally shared through our INBOX INSIGHTS newsletter, but now they've found a new home in this format, where you can revisit them anytime you need a dose of inspiration or practical guidance.

I want to take a moment to express my deepest gratitude to you – whether you're someone who occasionally drops by INBOX INSIGHTS, an active voice in our Analytics for Marketers community, or one of our trusted clients. Your presence, in whatever capacity, adds something special to our community, and I truly appreciate that. Here's to a 2025 filled with health, happiness, and achievements that make you proud.

Katie Robbert, CEO Trust Insights, Inc. December 2024

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January 03, 2024: Focus on the Process, Not the Outcomes

Ah, the new year. A fresh start for everyone, whether you asked for it or not. Metrics roll over, expectations are reset, and resolutions are made.

We often pressure ourselves to not only set big goals but also to achieve them. Dreaming big and being ambitious are admirable, but it's equally important to inject some reality into our aspirations.

Focus on the process, not just the outcomes.

It's easy to throw out numbers and claim them as your goals. Lose 20 pounds. Visit 20 countries. Adopt 20 dogs. However, these are merely numbers; they represent your desired outcomes. While it's crucial to understand your direction and aspirations, it's more important to know how you'll achieve them. So, focus on the process, not just the outcomes.

Take, for example, the goal of losing 20 pounds. That's a good start, but it's vital to build a plan around achieving this goal. What if you don't reach it? You might feel defeated and less inclined to try again. That's why focusing on the process is key.

You might wonder, "Isn't this just a KPI map?" Not exactly. A KPI (Key Performance Indicator) map breaks down the metrics that indicate whether you're on track to meet your goal. While a KPI map keeps you aligned with your goals, it often lacks context on how to improve those metrics. Let's say your goal is to lose 20 pounds by eating 1500 calories a day and working out four times a week. These metrics would be part of your KPI map (note: this is just an example, as I'm not a fitness expert).

However, focusing solely on numbers doesn't set you up for success. You still need to focus on the process. Start with the KPI of eating 1500 calories a day. What does that entail for you? How will you ensure adequate protein and nutrient intake? What adjustments are needed for days with more intense workouts? Establishing a detailed process will guide you toward your goal. Similarly, for working out four times a week, consider the type of exercise, necessary equipment, duration, and scheduling.

Now, think about your team and company. What ambitious goals have been set for

2024? Likely, they revolve around revenue. But how will you achieve this? Put the revenue target aside for a moment and concentrate on the process.

You might say, "We need to increase revenue by acquiring three new clients and upselling five existing ones." Excellent. Now, break it down into repeatable processes. What steps are needed to create awareness, attract prospects, and qualify them? Focusing on each step of your process will simplify reaching your goals.

Remember, it's only January. You have time to thoughtfully set up processes that will aid in achieving your goals. By documenting these processes and measuring progress, you can make necessary adjustments along the way.

What's next? Set your goals, translate them into KPIs, and then prioritize the process.

January 10, 2024: Why should you join a professional community?

Over winter break, I spent a lot of time reflecting and taking in information. Part of that was taking classes with the Peloton Community. If you don't belong to the Peloton Community, you might see it as a "cult". If you do belong, you know why you keep going back for more.

Part of what I get out of this community are things to think about. All the instructors have catchphrases. Many of them use their classes to share stories, drop wisdom, and provoke thought. Some of the quotes that have stuck with me are:

- It's not either/or, it's both/and
- Make modifications not excuses
- Progress over perfection
- Acknowledge the fear and do it anyway

I cannot say that in all the years I've been working out I've ever gotten so much out of a program. And a lot of it comes down to how strong the community is. I recently joined a team with Gini Dietrich (if you know how she rides, you know that I need your prayers). A few years ago, this isn't something I would have ever done. I've always been someone who thought I was better off doing it alone.

Until now.

The Peloton community got me thinking. Why is it so accepted to join a community in your personal life and seek out support? And why isn't true in the professional world? We build teams but then we silo them. We ask people to perform at their best, but we don't provide them a support system.

In fitness, you're encouraged to find a coach and an accountability partner (Gini is mine). The more people you have involved, the more successful you'll be. This is true both of team and individual sports. In the workplace, you're told to get your work done, stop distracting other people, and figure it out on your own.

Big, huge disclaimer - this is not true of all workplaces. There are many companies that have embraced community culture. For those that haven't, I'm talking to you. I've mostly worked at companies that want you to be a self-sufficient lone wolf. Everything else is a waste of time. When I look back at those experiences, I realize

how much I missed out on.

My goal today is to help you convince your company why prioritizing communities is a smart move in 2024.

Support, encouragement and accountability

Since the dawn of time, humans have been in search of their tribe. Modern day communities are no different. We inherently want to find our “people”. Groups with shared interests can support and encourage us. They can also offer accountability where we otherwise might not find it at our companies or on our teams.

Continual learning and diverse perspectives

One of the key advantages of joining a community is gaining access to individuals from diverse backgrounds. I grew up in a town where the majority of people shared similar characteristics and experiences as me. It wasn't until I went to college that I became aware of how limited my understanding of the world had been. Engaging with a diverse community allows you to pose questions that yield a wide range of perspectives. As members share their personal stories, you'll discover yourself learning from their unique experiences.

A few companies ago, I didn't realize how sheltered I was in the professional world. My ecosystem consisted of my coworkers, their experiences, and well...that was it. I spent a decade learning everything I knew about business from the same small group of people. When I left that company for a new role, my mind was blown. I felt like I knew nothing and I was so far behind everyone else. I wish I been a part of a professional community outside of my job. I wish I had known that communities existed. If I had, I would have been set up for more success when I moved on. I may have even been able to bring more back to my current role and not felt the need to leave.

Expanding your network

Joining a professional community has an obvious benefit. It allows you to expand your network. You have an opportunity to meet and connect with people outside of your normal circles. If you keep your circle small, you'll limit your opportunities and your learning will be narrow. Being a better professional, even a better person, means opening up your world and your mind.

Let's make 2024 the year of normalizing being a part of something bigger, asking for support, and learning from our peers. The motto of Peloton is “together we go far”.

What is your motto going to be?

Did you know that our [Generative AI for Marketers course](#) has its own dedicated community? You not only have access to our Analytics for Marketers community, but you also have a group dedicated just to you and the other students. This group gives you access to other who are learning about generative AI. You'll also have access to the instructors to help answer your questions.

[Register here!](#)

January 17, 2024: Creating an AI Task Force in Your Business

You don't need another meeting, another committee, and another task force. 99% of the time, committees get in the way of getting work done. They are poorly executed and rarely move things forward. And 100% of the time they start with good intentions and spiral out of control with personal agendas, too many members, and office politics.

Sounds fun, right? So why am I about to tell you that you need a new committee?

Because if you are implementing AI in your business, you need an AI task force.

If your business is on the smaller side, like less than 20 people, this won't really be applicable. You should have more control and transparency within your culture. As your company gets larger you have less sight into what's going on with teams, departments, and processes.

I like to say, "new tech, old problems". In the case of AI, this is true. Dropping a generative AI platform on top on your business isn't going to solve existing issues. IF anything, it's going to introduce new risks, vulnerabilities, and create more issues.

So, how do we fix this? With an AI task force.

I know. Another meeting, another committee. How we set ourselves up for success?

Clear Purpose and Goal

This is where you should start, before you assemble your super squad. It seems like a no brainer. What do we want to do with AI? Why are we bringing it into the company? How do we want to get there? Here's where it goes wrong. Setting a clear purpose and goal is like setting a New Year's resolution. It's great to make them but they are useless if you don't keep them. Part of setting the goals is determining how you're going to reach those goals. This is the work that you need to do before you start the AI task force. This could be an elaborate spreadsheet with milestones. More realistically, it's choosing someone whose sole purpose on the task force is to keep the task force on track. That's it. That is their whole role.

Diverse and Skilled Team Members

After setting your purpose and goals, getting the right people in the room is the next most important key to success. Start with the person who is going to keep the train on the track. This can be a project manager, an admin, or someone like me who is just incredibly bossy. Then you want to think about the voices that need to contribute. Depending on your goals with AI you will want as much representation of from your company as possible. Fair warning, this is where it gets unwieldy. For example, if you designate each department head a member of the task force you also need to have them designate their proxy. Just one. Not every single member of their team should show up to the task force. You want to create consistency and that means not changing out members all the time. To that, you want to make sure you don't just bring in the same cast of characters that sit on every other committee. Consider asking some team members that aren't decision makers but are in the weeds of the day to day. They will bring a fresh and relevant perspective.

Set Expectations and Accountability

Once you've decided who is on your task force, you need to lay down the law. Where a task force goes wrong is with good intentions. You set an agenda, you call a meeting, you talk about a bunch of things, and then the meeting ends. Members of the task force need to know what happens when the meeting ends and what they are responsible to do to make the initiative successful. I'll cover this in the next two sections.

Transparent Communication

When you put together a task force in a company it naturally creates excitement and breeds curiosity. People want to know what's happening and how it is going to impact their day to day. When you're getting set up, and setting expectations, decided on your communication plan. This would include regular updates on progress, challenges, and changes in the initiative. Having a strong plan with transparent communication cuts down on feelings of insecurity and FOMO (fear of missing out). When there is a lack of communication, the number of people that start showing up at your task force meetings start to grow exponentially.

Measurement

Why do something if you can't measure it? This goes back to having a clear purpose and setting goals and expectation. Create a tracker that lets you know if you're moving toward success or not. Scheduling meetings and having conversations isn't enough. When I sat on a task force, one of the things I was responsible for was adding up how much each meeting cost. So if you have a room full of department

heads for an hour at a time and you're not moving toward your goal, you're wasting money. Money that you might not be able to get back. It is in your best interest to set yourself up for success by having a set of measures that track back to your overall purpose.

As I'm listing these things, they feel straightforward. They should be easy to execute. But they aren't. Planning takes time to do it right. When you have a technology like AI that people are eager to start using, they are going to skip steps and start pressing buttons. The hardest part of a task force is holding people back. Exercising patience and restraint will help ensure you're doing things the right way for long-term success.

Shameless plug: [if you need someone to get you set up for success or be a member of your AI task force, give us a shout.](#)

January 24, 2024: How to Make Google Analytics 4 Work for You

I've been asking around, and the overwhelming consensus is that everyone dislikes Google Analytics 4. Why? It doesn't feel like an upgrade from Universal Analytics. If anything, we feel like we lost functionality and data. Google did not give us a choice to opt into this system; they forced us into it. The other option on the table is to find a new system all together. Either way, there has been a lot of pain to get us here today.

So how do we make the best of a bad situation?

Embrace the Learning Curve

It's important to acknowledge that GA4 is not just an update but a complete overhaul. This means a steep learning curve is inevitable. Don't get discouraged. Instead, let's see if we find the opportunities for continual learning. Generative AI is dominating the news cycle and the marketing industry right now. What better time to double down on your technical and analytic skill sets?

Focus on Key Features

GA4 comes with a range of new features and metrics. Instead of trying to understand everything at once, focus on key features relevant to your business needs. This is a great opportunity to spin up some user stories. As a reminder, a user story is a simple sentence with three parts: "As a [persona], I [want to], so [that]". The "persona" is the user, the "want to" is the action, and the "that" is the outcome. A user story will help you focus what you want to do with the system so that you can focus on where you want to start.

Engage with the Community

You are not alone. There are a lot of people who are on the struggle bus with Google Analytics 4. There are just as many people who are thriving. Ok, maybe not as many, but they are out there! Seek out groups and communities on platforms like LinkedIn, Slack, and Discord. You'll quickly find people to commiserate with. While you're commiserating, you'll also be able to help each other learn the new system.

Provide Feedback to Google

Google made a lot of changes when they rolled out Google Analytics 4. It might also feel like they didn't take user feedback into consideration. So, providing feedback now might feel like it's going into a black hole, but it's worth a shot. If nothing else, it might be cathartic to tell them everything you dislike about the new platform.

Regularly Review and Adapt

Building habits is hard. But the more you do it, the better it will be. Take 5 minutes every morning to review your data. Set a goal for one week. Then do it again the next week. Then do it again. I cannot promise that the system will improve but I can promise that you will start to get more comfortable with it over time. You just have to stick with it.

Professional Training or Consultation

There are great resources out there to help you understand GA4. There are YouTube channels, newsletters, and endless content that will help you get set up. You can also take our Google Analytics 4 for Marketers course to help you get skilled up.

[Register here](#)

If you get fed up and just want someone to setup the system for you, we do that too!

[Reach out to us](#)

It might feel hopeless, but there is a light at the end of the Google Analytics 4 tunnel. If your company has elected to use it as your system of record, it's time to embrace it.

January 31, 2024: New Technology Doesn't Solve Old Problems

New technology doesn't solve old problems. It doesn't. If anything, it exacerbates existing issues by adding complexity or masking underlying problems. If you have problems with your purpose, people, process, platforms, or performance, the solution is not layering more tech on top.

We're seeing this play out in a lot of companies right now. Instead of digging into why a person or team is underperforming, they are getting replaced with AI. The team may not even be underperforming. Maybe the leadership team is the problem. So they replace everyone with some kind of tech.

This is not the solution. New technology doesn't solve old problems.

How can you determine what problems your company has? Use the 5P Framework to do a quick audit and see where you need to focus.

Lack of Purpose and Goals (Purpose):

What is the problem we're trying to solve? What is the question we're trying to answer? A lot of companies get so wrapped up in the "big idea" that they forget to tie it back to reality and break it down. If you're setting goals, make sure people know why. Does it align with your mission and objectives? Are those clear to everyone? Introducing new tech will only cause more confusion if your purpose isn't clear.

Lack of Communication (People):

Effective communication is important in any situation. However, in a business setting, it is essential. The larger your company is, the easier it will be for communication to break down. As a result, people rush around, make quick decisions, and forget to talk to one another. A breakdown in this area can lead to misunderstandings, inefficiencies, and a disjointed workforce. New tech can facilitate communication but can't resolve underlying issues like siloed departments or a lack of open dialogue.

Lack of Repeatability and Scale (Process):

Technology is most effective when it enhances well-thought-out, efficient processes. It's about creating a flow that technology can streamline and scale, not replace. When processes are poorly defined or outdated, it leads to inefficiency and confusion. Implementing new technology in an environment with weak processes can exacerbate these issues.

Lack of Governance (Platform):

What the heck is in the system? Who owns it? Who is maintaining it? Without proper governance, decision-making can become erratic and uncoordinated. If you're not clear about what information lives in your existing systems and how you're using them, new tech won't solve that problem.

Lack of Accountability (Performance):

Effective performance requires a clear understanding of individual and team responsibilities. You need to establish clear expectations and key performance indicators. When accountability is absent, how can you know your progress? Introducing new technology cannot instill a culture of accountability.

Regardless of how big or small you think the impact of new tech will be, you need to first be aware of existing organizational issues. Use the 5P Framework to run through each team and the company as a whole. Once you're feeling confident that you've addressed the major issues you can go ahead with your new tech.

February 07, 2024: Using Generative AI to Build Requirements

When I was a project manager overseeing developers, our biggest struggle was agreeing on the level of detail needed for requirements. It was a constant source of contention. As a PM, my goal was to make sure we knew all the moving pieces, potential pitfalls, and unlikely (but still possible) outcomes. The development team, along with many stakeholders, wanted to push buttons, move faster, and start building.

Because the team wanted to move faster, that was usually what happened. Requirements be damned!

To make a long story short, the team often found that development took longer and was less directional. The stakeholders would get frustrated that there was nothing to show for all the money and time invested, and I was unable to quote an end date.

When I started working with Chris, I ran into many of the same issues. He wanted to move fast, I wanted to create documentation. If you're wondering why I'm so keen on requirements and documentation it's simple. Taking the time upfront saves time later on. It allows for faster scalability, process development, and repeatability. You have a roadmap for what you're doing and can pinpoint where your code goes wrong more easily because you know what to expect.

Think about the home you live in. Whether it's a condo, apartment, house, or something else, you want a solid foundation. You'd hope that the team that built it spent a little more time on the planning and structure. You'd want assurances that the support beams were level and properly secured. This upfront work takes a little longer so that the rest of the building can fall into place. Everything else about building the house should be a repeatable process. Just like software development. Once the foundation is in place, you follow the plan and know what to expect.

You can, and should, use the 5P Framework to get your basics. As a reminder, the 5Ps are Purpose, People, Process, Platform, and Performance. Depending on what you're creating, you'll want to go deeper into each of those. This is where you can use generative AI to build requirements.

We tend to forget about the “chat” in ChatGPT. We approach the system like we need to have all the answers to get the desired output. However, we can use the system to help us figure out what we need.

I want to encourage you to chat more with your generative AI system. You can still structure your questions like prompts. A great resource is our [RACE Framework, you can get your free copy here.](#)

Some great questions to ask are:

What am I missing?

If I’m building a (insert thing) what are the risks I’m not thinking about?

What questions haven’t I asked?

Any other considerations that people forgot about when building (insert thing)

You can even go so far as to ask your generative AI system, “What questions should I be asking?”

We all have blind spots. This is why peer reviews and paired development are essential. Other people can catch what we miss. Starting with generative AI can save you some time before you bring your business requirements to the decision-makers.

February 14, 2024: The Problem with Using Jargon - Part 1

Jargon can make people feel less intelligent. Sometimes it's weaponized to keep people down. Many who use it struggle to communicate without it.

Being in business and tech, I run into this all the time, both on the giving and receiving end. This morning, I had an experience where someone from the financial industry mentioned a concept with which I wasn't too familiar. When I asked him to explain in more detail he immediately turned condescending and made me regret asking.

Jargon is occupation-specific shorthand language that can be hard for someone not on the inside to understand.

Some common examples:

- Circle-back - let's come back to this topic
- Level set - let's all get on the same page with the information
- Put a pin in it - now isn't the time to discuss but it's important to follow up on

When you get into different disciplines, the jargon becomes even more complex.

In software development, we'd use phrases like:

- Swim lanes - different stages of work efforts
- Scrum - a planning meeting
- Sprint - a two-week development effort

In project management, the jargon includes:

- Bottlenecks - people or dependencies preventing tasks from moving forward
- Waterfall - a type of task completion where one task is reliant on the previous
- WBP - a work back plan where you create your timeline in reverse order from the end date

The point is that we all have our versions of short-hand language. It might save you some time but it could do big damage. What happens when we're over-reliant on jargon to communicate?

Creating Barriers to Understanding

Using jargon can create a culture and set a tone where users feel alienated. It's hard to feel confident participating when you're not sure what's going on. It can start to

feel like a members-only club and outsiders aren't sure how to get invited in.

Signals Exclusion or Elitism

Jargon can unintentionally make someone seem superior. When we feel like we aren't smart enough to hold a conversation with someone, there are lots of missed opportunities. Conversely, if we're using jargon that only a few people understand, we're excluding the majority of our audience.

Reducing Engagement

Are you using jargon in your content marketing? Short-hand and specialized language limit the audience's willingness to engage. If they don't understand what you're talking about, they'll skip over your content. Your competitors are happy to create content for your audience that isn't confusing. Don't let them steal away your people!

Negatively Affects Brand Trust

Overuse of jargon in your marketing can appear empty and soulless. There is no authority, no value provided. It's just a bunch of meaningless words. Your audience will lose confidence in your voice and may begin to distrust your opinions.

There are a lot of ways that we can make our audience feel "less than", even when we don't mean to. The overuse of jargon is one of those ways and is preventable. In Part 2 I'll give some tips if you're the one talking in jargon and how to get out of your own way.

February 21, 2024: The Problem with Using Jargon - Part 2

Last week, I outlined why being too heavily reliant on jargon can be problematic.

To recap:

- You can alienate your audience
- You create barriers to understanding
- You are reducing engagement
- You are negatively affecting brand trust

[You can read the whole post here](#)

So, how do we fix this problem?

For jargon users:

If you're guilty of using too much jargon, use this as a research opportunity. Talk to your people. This is your internal team and your external audience. Ask them where their comfort level is with specific language. Your job is to meet people where they are before expecting more.

If the language you're using isn't resonating, create content to educate. Develop helpful content that will help people of all levels understand the concepts. Give them context into the terms, when to use them, and examples.

This is also an opportunity for you to expand your vocabulary. If you're reliant on jargon to communicate, take a step back. Challenge yourself to write a post that doesn't use any jargon. Can you do it? It's a good exercise to help you hone your communication skills.

This will be an exercise in restraint and patience. What we find to be easy and simple, others may find to be challenging. Don't make assumptions about how quickly your audience is catching on. Make sure your content is continuously updated and accessible.

Lastly, check in frequently. As technology evolves, so does the language used to describe it. Make sure that as you're staying up to date, you're keeping those around you updated as well. Be sure to check in with your audience to ensure that the

content you're creating is helpful and not adding to the confusion.

If you're on the receiving end of jargon:

If the terminology you come across isn't familiar to you, this is your opportunity. It is not a reflection of your intelligence. Be shameless in asking for clarification and more context. The person speaking in jargon may not even realize that's what they are doing.

To meet the other person where they are, try paraphrasing what they are saying. For example, "I think what you're explaining is this, is that correct? If not, can you fill in the pieces for me?" It signals to the other person that you're paying attention and that you're invested in the conversation.

To that, it's also an opportunity to provide feedback. Once you have a grasp of the jargon, offer helpful suggestions to the content creator. Offer concrete suggestions, not just, "You should do this and that". Help them understand why it didn't land the first time. Chances are, they may only be aware of their perspective and could benefit from hearing yours.

We all want to be as clear as we can when communicating. Sometimes, we stumble and create barriers to understanding by incorporating too much jargon. Have someone take a second look at your content to make sure it's helpful and informative, not alienating. Continue to challenge yourself to reduce the use of jargon and ask for clarification when you do come across it. There are times when the use of jargon is acceptable. When using it, be sure to include context and definitions to make your content inclusive.

February 28, 2024: User Stories Deep Dive

If you're new to Trust Insights, welcome! User Stories are one of my favorite forms of communication. If you're not new, thanks for returning. You already know that my love language is user stories.

I realized, however, that I haven't done a deep dive into why user stories are so effective. Well, buckle up, that day has come.

First, to get us all on the same page, we use user stories to help define the 5Ps. The 5P Framework is Purpose, People, Process, Platform, and Performance.

A user story is a three-part sentence that tells you the audience, action, and outcome.

"As a [persona], I [want to], so [that]."

The "persona" represents the "people", the "want to" tells you the "process and platform", and the "that" defines the "purpose and performance".

But really, what is a user story?

"A User Story describes a feature or requirement that is to be implemented and is independent of a specific tool (i.e. JIRA, Rally, Trello, etc.). User stories are employed in various Agile frameworks including Scrum, Kanban, and Extreme Programming."

Source: https://tech.gsa.gov/guides/effective_user_stories/

Something I haven't discussed is the acceptance criteria for a user story. It's another framework! (I did not create this framework). The framework you can use is INVEST (Independent, negotiable, valuable, estimable, small, testable).

Source: https://tech.gsa.gov/guides/effective_user_stories/

What the heck does that mean? It means that when you are creating a user story, it should be the lowest possible point of your requirement. If you can take your user story and break it into smaller stories, you still have stories to write. It also needs to

demonstrate value. When I talk about user stories, the “so [that]” maps to the purpose and performance. Your outcome. It’s your “why”.

User stories in Agile development are well documented. Repurposing user stories in general business and marketing, not so much.

Why user stories?

I prefer user stories over other kinds of requirements because they are straightforward. It’s a simple sentence with a lot of flexibility. In Agile development, there are many rules governing how we create and execute user stories. In business, we don’t need the same rigidity. We can use them as a communication tool. We can use them to make sure we’re all on the same page about what we’re doing. We can use them when we aren’t sure if our actions align with our goals. We can use them when we want to make sure we’ve represented everyone’s needs.

How do we write effective user stories?

The first P is Purpose. This is your goal, your intention. What is the problem you’re trying to solve? What is the question you’re trying to answer? We often start with really big goals. When our goals are too big, it makes it hard to create a performance plan (the fifth P). Drafting high-level user stories can help break down your goal into manageable, measurable pieces.

“As a CEO, I want to create content around user stories, so that I can explain their value”

This is a good start, but it doesn’t tell me what I need to know. How do I define value? How do I know I’m explaining the concept correctly? Let’s keep going.

The second P in the 5P framework is People. Who are the people involved in your initiative? Who are the customers, the end users? Each of these people should have their own distinct user story. Each user story should speak to their needs and track back to your overall goal.

This is where a lot of teams get stuck. They don’t create enough representative user stories. They also forget to create user stories for their different audience members. You might think, “This person isn’t involved so they don’t need a user story.” To that I would say, create one anyway. You might realize that they have a role that you were not aware of. At the very least, you’ll have all your bases covered.

The third P in the 5P framework is Process. How are you going to write and collect user stories? I like to introduce the idea to my team and then let them create their own. It takes practice, or rather, a process. The more you use them, the easier it is to create them. Often when I'm talking with someone, I'll rephrase their statements as user stories. It's a good way to verify that you've understood what they are after.

User stories are also an effective way for you to work out what your process is for an initiative. The "want to" in the user story can start to help you understand what that is.

Let's look at the example above, "As a CEO, I want to create content around user stories, so that I can explain their value." That statement tells me that we're creating content. The first thing I would do with this information is look at our content creation process. Do we have a repeatable process or do we need to develop one?

The fourth P in the 5P framework is Platform. I always discourage people from listing the platform in the user story. Why? Because it can create an unconscious bias towards the solution. If you state, "I want to create content" your options for doing so are wide open. If you state, "I want to create content with generative AI" you narrow the kinds of solutions you can choose from. In the first statement, generative AI could be a solution, but it might not be. You don't want to limit yourself by stating the platform. The user story should inform you of the platform selection, not the other way around.

The last P in the 5P framework is Performance. How did you do? In the context of user stories, they should tell you what you need to know to move an initiative forward. They should inform you of your team and customer's needs, and what actions you need to take. I frame the performance section as "Did you answer the question asked?" and "Did you solve the problem?" In this case, did I successfully show the value of user stories to my audience? Hopefully, you'll tell me!

Tips and Best Practices

Keep your user stories concise and focused. They should always tie back to your goal. Make sure your user stories aren't complicated or use overly technical language. Anyone, regardless of their involvement, should be able to understand a user story. Use user stories to help with shared understanding. Lastly, iterate user stories as the initiative evolves and as you learn more information.

March 06, 2024: Using Generative AI to Build Your Ideal Customer Profile (ICP)

My brain is buzzing and my head is spinning.

Chris and I have been using Generative AI for the past two hours to build our Ideal Customer Profile (ICP). Why? Often we get asked, "Who is your ideal customer?" I realized that we always give a weak, vague answer. So, it was time to do better.

We have a large amount of data. This should come as no shock to anyone, given who we are and what we do for customers. The challenge has always been figuring out how to make sense of this data in an actionable way. Ironic, given what we do for our customers. But, our company is always the last priority. Something like "the cobblers kids have no shoes." Anyway, we finally set aside the time and went through the exercise.

What did we do? First, we create a user story. I was floundering around with too many places to start and needed to focus my attention. Chris asked for user story for this exercise.

This was first user story. Like me, it's a bit of a mess:

"As a CEO I need a better handle on the characteristics of our ideal customer. so that I know who we're looking for on LinkedIn and who we're trying to reach with our content. So we can speak to that person."

I went ahead and refined it to be more focused. This was the second draft that we worked off of:

"As the CEO, I need to better understand the data points of my ICP, so that I can create tailored content and services for them"

It's still a complex user story, but it hits all the marks. If we break it out into the 5P Framework, this is the data we know:

Purpose: To understand our ICP. To create tailored content and services for our

ICPs. Who is most likely to benefit from our services?

People: Me. This is where we should have created more user stories. I'm not the only one who will be executing the eventual plan. However, since we're a small company, I prioritize and delegate the action items.

Process: What I stated was "better understand" and "who we're looking for". This tells me that we need to create the ICP in such a way that the characteristics create a search query

Platform: I listed LinkedIn. You don't list your platforms in your user story. What you get is your instructions for what you'll need. To "better understand" our ICPs, we used a wide variety of platforms where the data lives. To have a well-rounded ICP, we need to bring in a lot more data. So we used LinkedIn, our CRM, our website, our contracts, and other documents we've created. We used Google Gemini to help us analyze and summarize the information.

Performance: If our purpose is to understand who our ICP is, that's what I'll measure our exercise on. (spoiler: we figured it out).

If I were grading the user story, I'd give it a solid B. It could be further refined, but it gave us enough direction to get started.

Next, we had to collect all the data from the Platforms we listed. I'll spare you the gory details of how we had to pull everything together. That's not the point of this post. After the two hours we spent pulling everything together and massaging it through Gemini, we had our ICP. I know have a better handle on company size, revenue, roles, and pain points. Knowing these factors will help me focus our efforts.

What I learned through this process was that Generative AI was not the star of the show. Sure, we got through the data faster than we would have doing it manually. However, there was a lot of iteration with the system. The initial results were always generic. The memory of the system was short term. The capacity to take in data has limitations.

The star of the show was us. Me and Chris. The humans. The brains of the operation with the institutional knowledge. The people who know the company so well that we

can reject generic results without hesitation. Not generative AI.

I say this because there is a lot of fear and insecurity that AI will take your job. There are hasty decisions to replace entire teams with generative AI. There is a large misunderstanding that generative AI will solve your problems. It won't. And it should not replace your entire team.

Had we not worked at it, iterated, pressed on, we would have had very mundane results. We would have had an ICP, but there would be nothing that differentiates this profile from the company down the street. What are the specific pain points of OUR customers? Are the services we offer aligned with those very specific pain points?

You are the star of the show. You are the valuable asset. You know your customers, your company, your outcomes. Generative AI can learn these things, but it will forget as soon as you tell it. Generative AI can come up with a marketing plan, but it will give you the same plan it gave the person before you. You are what makes generative AI successful.

Let me climb down off that soapbox and get back to the point. Well, that was the point. Generative AI made our process move a lot faster, but it didn't replace the hard work. We still went through the 5Ps. We still went through all our data. We still had to refine the outcomes. And now, we still have to do something with this information.

Now that I have an ICP, I can start taking action on creating custom content and services. I can focus my time. I can streamline the topics I write about in this newsletter. Hopefully, I can close more business. Fingers crossed.

March 13, 2024: Predictive Analytics for Your Customer Journey

In 2018, I stepped onto the stage for the very first time at INBOUND. I spoke to 1200 people about predictive analytics.

Six years later, it is still my favorite presentation. Not just because it was my first experience public speaking, but because the topic is still relevant.

In this talk, I covered:

The Data Analytics Hierarchy

- Descriptive
- Diagnostic
- Predictive
- Prescriptive
- Proactive

The Predictive Analytics Process

- Project
- Pull
- Prepare
- Pick
- Predict
- Plan

Using Predictive Analytics through each stage of the Customer Journey

- Awareness
- Consideration
- Evaluation
- Purchase
- Ownership
- Loyalty
- Evangelism

And caveats about Predictive Analytics

- Use judgment
- Expect the unexpected

- You can't plan for everything
- It's not a crystal ball

All in all, it was a solid presentation. Many times when we look back at earlier work it makes us cringe. The only thing cringy about the presentation is my lack of design skills. In 2024, that hasn't changed either. Despite that, I still feel really proud of the presentation. I wouldn't change the topic or the message. Because, even six years later, it's all still accurate. There are finer details that would need updating. Especially with generative AI being part of the conversation. Overall though, the message is still the same. You can use predictive analytics in each stage of your customer journey.

So, why isn't predictive analytics used more often in marketing tactics as of 2024?

This week, let's do a review of how to use predictive analytics with your customer journey.

First, what is your customer journey? At a high level, these are the stages that your customer goes through when making a decision. Your customer journey is as simple or as complex as you want it to be. A simple customer journey consists of four basic stages: Awareness, Consideration, Evaluation, and Purchase.

You may have noticed that a customer journey maps to your sales and marketing funnel, with awareness at the top and purchase at the bottom.

Where does predictive analytics fit in? Let's see, shall we?

Awareness:

This is the first stage of the customer journey. This is when people find out about you, visit your website, and check out your public content. Since this is the stage when people learn about you, you know the least about them too. Using publicly available data sets like Google Trends and keyword data from SEO tools is your best bet. This data, run through a time-series predictive analysis, can tell you what topics people care about and when. This will allow you to create your content calendar to align with the topics that are the highest searched tied to specific dates.

Consideration:

In this second stage, people are engaging a bit more with you and the content. They might be signing up for your newsletter or following you on social media. There are a

couple of data sources you could use to reach people at the right time. The first being Google Trends data and when people are searching for setting their “out of office”. This indicates that they won’t be checking their email. Trying to send them a campaign or offer will get lost. You can also use your newsletter subscriber data to understand the seasonality. Weeks when you predict a lower number of subscribers you can ramp up your marketing efforts.

Evaluation:

Your relationship with your potential customer is becoming more serious. You like them, they like you, and they want to get to the next stage, evaluation. They are ready to become a lead. You can look at your CRM data and the number of leads generated over time. Using predictive analytics you can project when your audience will move to evaluation.

Purchase:

This is the stage that tells you you’ve done your job well. This is when someone buys something, or takes the intended action. A good starting place for using predictive analytics is your revenue data. You can run an analysis to understand when you are more and less likely to make sales, and plan your campaigns around the highs and lows.

If you run these analyses, and then look at all the phases together, you’ll start to see the purchase patterns of your customer. You’ll also start to understand the typical life cycle and how long it takes to close a sale from awareness to purchase. And you did this all with marketing unsung hero, predictive analytics.

Now, I’m talking in broad strokes and at a high level. You’ll want to go through the 5P Framework, create your user stories, and then establish your data governance. However, once you’re set up, you can rerun a predictive analysis and adjust regularly as you gather outcomes.

I’m proud of 2018 Katie. She nailed it. I think I’m going to have to update her presentation and give it new life.

March 20, 2024: Highlighting Women For Women's History Month

It's Women's History Month. We get really excited about it at the start of March, and then it drops off. We get busy and we forget that it should be a month long event. Well, 365 days a year, but that's for another day.

There are so many women doing so many great things. I wanted to take a moment to highlight a few of them.

I asked our Analytics for Marketers Community who we should be paying attention to. These are the women they told me about:

- [Dr. Timnit Gebru](#): founder of Black in AI: does a TON in AI ethics.
- [Dr. Margaret Mitchell](#): Hugging Face: NLP and vision.
- [Dr. Raid Hadsell](#): Deepmind: Pioneer on LSTMs.
- [Dr. Fei-Fei Li](#): Stanford: She co-created ImageNet and is synonymous with cognitive computing.
- [Dr. Anima Anandkumar](#): Caltech and NVIDIA: Tensor-algebraic computing, she leads a ton of research on making GPUs work better, which is the hardware foundation of AI today.
- [Dr. Joy Buolamwini](#): MIT: She's a leading voice in gender and race bias research in AI.
- [Dr. Lilian Weng](#): OpenAI: She's one of the reasons you have ChatGPT at all.
- [Debbie Millman](#): Designer, Author, Illustrator, Educator, Brand Consultant, Host of the Webby-winning podcast 'Design Matters'.
- [Juliana Jackson](#): I write about Mobile Apps, Product & Experimentation.
- [Nancy Duarte](#): CEO and author of six best-selling books. For over 35 years, Duarte, Inc. has worked with the highest-performing brands and executives in the world.
- [Sadie St. Lawrence](#): Founder, HMC Institute | Founder, Women in Data | AI Instructor/Researcher | Podcast Host | Author
- [Susan Cain](#): #1 NY Times bestselling author, BITTERSWEET and QUIET. Unlikely award-winning speaker. Top 10 LinkedIn Influencer.
- [Julia Goldin](#): Global Chief Product & Marketing Officer at the LEGO Group. On a mission to inspire and develop the builders of tomorrow and give as many children as possible access to the developmental benefits – and endless fun – of the LEGO system in play.

- [Adriana Tica](#): No-BS, zero-hacks marketing strategy. I help people build & grow a future-proof sustainable business. | Here to make you think. | Marketing strategist, trend analyst, writer.
- [Afua Bruce](#): Author, The Tech That Comes Next | tech + strategy + impact | Executive Advisor | Board Member | Keynote Speaker
- [Amy Sample Ward](#): Author of The Tech That Comes Next: How changemakers, philanthropists, and technologists can build an equitable world
- [Safia Noble, Ph.D.](#): David O. Sears Presidential Endowed Chair of Social Sciences at UCLA; Professor of Gender Studies, African American Studies; MacArthur Fellow
- [Amy Sample at PBS](#): Vice President Business Intelligence at Public Broadcasting Service | Member, Chief | Director Emerita, Digital Analytics Association
- [Lisa Feldman Barrett, PhD](#): is among the top 0.1% most cited scientists in the world for her revolutionary research in psychology and neuroscience. Lisa Feldman Barrett's books about the brain and emotions are very interesting.
- [Vahbiz Cooper](#): Digital Marketing Dynamo: Mastermind Behind Creative Designs, Podcast Production, and Social Media Mastery

This is not an all inclusive list of great women doing great things but it's a great start if you want to know who to follow. Who would you add?

March 27, 2024: The 5P Framework - Where It Began

Last week I had the realization that a lot of us come to - just because I know something well doesn't mean everyone else does. I've been making assumptions about how well "everyone" else knows the 5P Framework. To give myself a gut check, I put up a quick poll on LinkedIn and got a few "I don't know what the 5P Framework is" responses.

Knowing this is super helpful. I ended up writing this piece and pinning it to my profile.

[You can read it here.](#)

The 5Ps are Purpose, People, Process, Platform, and Performance.

- **Purpose** - What is the question we're trying to answer? What is the problem we're trying to solve.
- **People** - Who should you involve? Who needs to know about this?
- **Process** - How will we answer this question, solve this problem?
- **Platform** - What tools do we need? What software will we use?
- **Performance** - How will we measure success? How do we know we solved the problem?

I created the 5P Framework as a reaction to digital transformation. Digital Transformation is "People, Process, Technology" with an emphasis on technology. I've been working long enough to have been through quite a few "transformations". To put it in perspective, when I started working with developers our technology was floppy disks and CD-ROM. Bringing our product "online" was a huge and painful step.

We struggled through this transition. The technology wasn't the problem, it was a natural step. The problem was with the approach. It was the people and the processes. We made the naive assumption that the user workflow would be the same online as it was from a CD-Rom. Spoiler - it wasn't. The web offered us new functionality not previously possible with the older technology. Instead of taking a step back to examine our decisions, we just kept developing and innovating. We lost sight of the end user and became too focused on the final product.

This is just one of many examples. There are times when a digital transformation effort goes well, but in those cases it's not usually referred to a digital

transformation. The phrase puts the wrong expectations on an initiative and creates a bias of “tech” first.

The consulting firm Capgemini, (in partnership with the MIT), coined the term “digital transformation” in 2011. They defined the phrase as: “the use of technology to radically improve performance or the reach of businesses.” ([source](#))

Here’s the problem. In theory, it makes sense. Your business needs to continue to evolve as tech changes. Your customers will expect it and your teams will be itching to skill up. In practice, it is technology first. When we choose a platform first, we have to retrofit our processes and people into it. There may be mismatches and lack of features. However, we’ve purchased or subscribed to the tech, so we feel obligated to make it work. It can be a burden on the company financially and burn out your teams to try to make it work.

When I talk about the 5P Framework, I often tell the story of how I tried to roll out MS Project with Sharepoint three different times at my old job. The technology was fine enough, but the company chose it without consideration of the people and processes. Looking back, it wasn’t the right solution. Since it was the technology they chose, they were determined to make it work. They were determined to have me make it work. It was a lot of time and energy put into an initiative that wasn’t set up for success.

This is why I created the 5P Framework. It puts people and processes first. It is also bookended by purpose and performance. I’m that annoying team member who always asks, “Why?”. It’s kind of like trying to fend off a toddler. I will keep asking “why” until I get a satisfactory answer. And then I will remember what you told me and want to know if that was the result. I know I’m not alone in this, I just happen to be painfully self aware.

If you are wanting to evolve your business with a digital transformation, know that it is a culture shift. It’s more than a transformation. It’s an overhaul. And it is not a small effort. You want to be clear on your purpose. You need to get your people on board. You need to understand how your processes will change. Then you can choose your platform. Lastly, you want to measure your performance.

April 03, 2024: How Good Is Your Data Governance?

Last week, Harvard Business Review asked the question, “Is your company’s data ready for Generative AI?”

Because I work with a variety of clients, I would say a resounding, “No!”

[You can read the full article here.](#)

You need at a minimum, decent data governance before you can use your data in a generative AI system.

Before we get into that, let’s all get on the same page about where generative AI fits into the Data Analytics Hierarchy.

Say, what?

You’ve never heard of the Data Analytics Hierarchy? That’s surprising. The name totally just rolls off the tongue.

For those that don’t know, the hierarchy consists of five stages: Descriptive, Diagnostic, Predictive, Prescriptive, and Proactive. Think of it like rungs of a ladder. You start on the bottom rung and climb your way up to the top.

This is what it looks like. Forgive me, I’m not a designer:

Data Analytics Hierarchy

Analytics Stage	Answers Question	Associated Technology
Proactive	Can a machine do it for me?	Deep Learning
Prescriptive	What should we do?	Machine Learning
Predictive	What will happen?	Statistical
Diagnostic	Why did it happen?	Qualitative
Descriptive	What happened?	Quantitative

Hierarchy of analytics

Here's why I say that your company's data is not ready for generative AI. Most companies, whether they recognize it or not, are still at the bottom of the hierarchy. They cannot confidently say, "What happened?". If they can say what happened, they need to determine if they can also say, "Why did it happen?". Generative AI doesn't enter the chat until the at least the third rung.

"But I've used generative AI to analyze my data!"

Using generative AI to make sense of your data is not the same as having solid data governance.

I get it. This is the not-as-fun stuff. Think of it like eating your vegetables so you can have dessert. Data governance is Brussels sprouts. You either love them or hate them. Either way, they are really, really good for you and you're better off if you eat them.

(Stops to dig around in the produce drawer of the fridge for a snack)

Back to the point. If you don't have good data governance, you won't have good data analysis. How do you set up good data governance? I'm so glad you asked!

The 5P Framework!

- What is the **Purpose** of collecting and using the data?

- Who are the **People** responsible for and that have access to the data?
- What is the **Process** for collecting, cleaning, and maintaining the data?
- What are the **Platforms** use for data collect, storage, and analysis?
- What is the **Performance** of the data? Are we confident in it?

Think about your Google Analytics 4 data as an example. I've heard numerous complaints from users that the data is different from Universal Analytics and they don't believe the numbers. If this is the case, why are they still trying to make decisions from it? Generative AI won't help. You have to get to the root of the issue, and that's your data governance.

Once you have a solid foundation, the rest should come "easily". I put that in quotes because maintaining and analyzing your data for insights isn't easy. If you have repeatable processes in place and people who can maintain your systems, you can ensure data quality.

The moral of the story is eat your vegetables.

Well, the real moral of the story is to have a strong data foundation through your governance. When you have that piece in place, you can keep moving up the hierarchy and confidently bring generative AI into your company.

Quick plug - if you want help with your data governance, [we can do that. Give us a shout!](#)

Is your company's data ready for generative AI?

April 10, 2024: Making the 5P Framework More Flexible

Staring at the blank page before you, open up the dirty window...

I don't know about you, but where I live the sun is finally out and the weather is actually nice.

I'm totally distracted. The nice weather is temporary. It's going to rain in the next day or so (again). While we have the sunshine I want to soak up as much of it as I can which means I am not focused on sharing valuable information.

Here's where my brain is at today; let's see what we can do.

I keep thinking I could write about my recent changes to the 5P Framework. I adapted and created the 5P Framework from Digital Transformation (DT or DX). DT is People, Process, and Technology. The challenge with DT is that it's platform first, people last.

The 5P Framework is Purpose, People, Process, Platform, and Performance. The emphasis is on people, bookended with purpose and performance.

And then it struck me, that's wrong.

Well, it's not wrong so much as it's not always right.

In an ideal scenario, you would always put people first and choose the platform last. But that's limiting the 5P Framework to net new situations. My goal with the 5P Framework was to make it a flexible decision tool. The framework will help you get organized, define a meaningful purpose, and measure your outcomes.

However, if I'm over here insisting that you always put people first, I'm missing the mark. Let me explain.

The 5P Framework is going to help new AND existing situations where you already have a platform. Someone chose it. The team inherited it. However it came about, you're locked into a platform.

So, now what?

In the very likely event that you already have a platform, I want you to feel confident using the 5Ps.

When I talk about setting your purpose, I encourage you to keep the platform out of it. Now we know that many times, you are trying to figure out what to do with the hunk of junk that landed on your to-do list. Now, your purpose should include the platform.

For example, this would be my purpose statement:

“As the CEO, I need to figure out how to get the data out of my existing CRM, so that I can make decisions with the data.”

Because I have the platform, I need to focus heavily on process development and who to involve. The first thing you would want to do is to walk through the 5Ps as if you did not have the platform. This will give you your base set of requirements.

The revised purpose statement would be:

“As the CEO, I need reliable, daily reporting about my customers, so that I can make tactical marketing decisions”

From here, I'll list out the decisions I need to make. I'll engage the people who will help build reports and take action on the data. I'll define my performance and measure of success.

Once I have those requirements, I can do a gap analysis. How many of my requirements can my existing platform satisfy? If there is a large gap between what I need and what the platform can do, I have some big decisions to make. Is it worth starting over with a new platform? Can I add onto the existing platform to get it more closely aligned with the needs?

All this to say, I wasn't using the 5P Framework in a flexible way. I was too rigid with the order of people, process, and platform. They should not be dependencies like in waterfall where you have to complete one before moving onto the next step. You can reorder them. You can define them in parallel. Provided you end up with each P

having its set of definitions, how you get there is less important.

I'm still refining the details, but the core use is still the same. You start by defining your purpose, you walk through people, process, and platform, and you measure your performance. The difference will be how you approach understanding people, process, and platform.

Hey! Look at that! I managed to focus long enough to share what's going on.

Ok, back to soaking up the sun.

...let the sun illuminate the words that you could not find...

April 17, 2024: Prompt Engineering Life Cycle

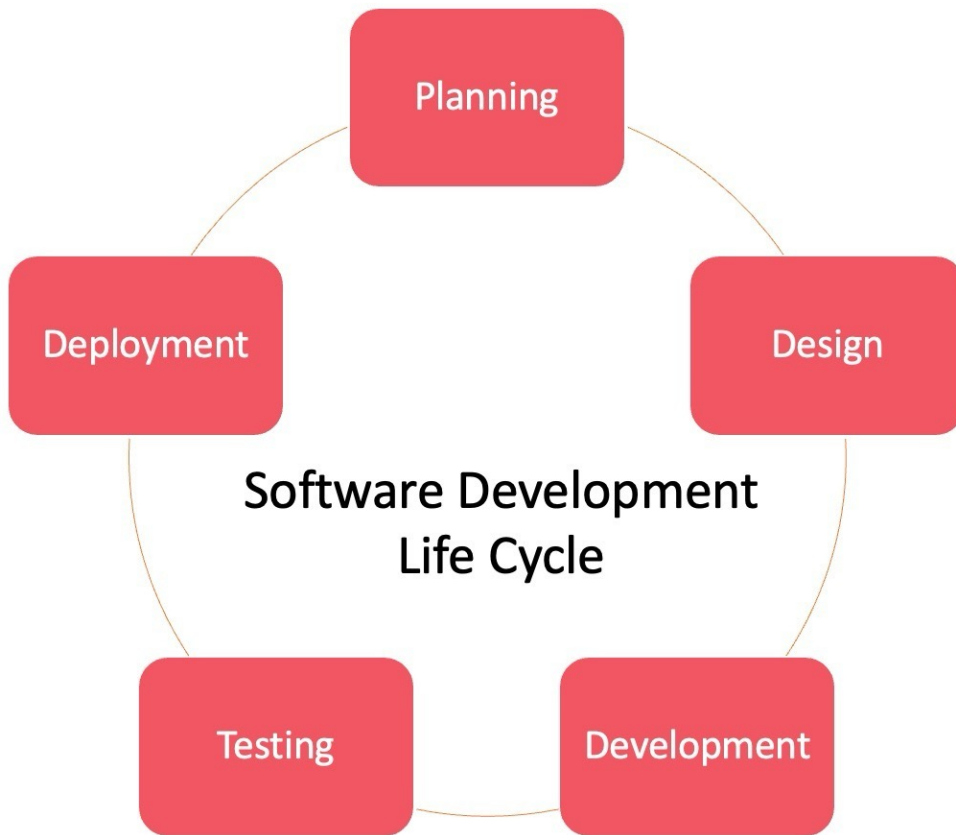
This week, Chris asked if I could speak about how prompt engineering fits into the software development life cycle (SDLC). It's an interesting question to tackle. This either assumes that prompt engineering is a type of development, or you can use the SDLC for non-technical tasks.

Either way, let's see what happens.

For context, the software development life cycle (SDLC) was created in the 1960's to help break down complex business systems. The purpose, at the time, was for systems development that required data and analysis. As programming evolved, the life cycle also evolved and became the framework we know today.

Every company has their own version of the SDLC, but at the core, the phases are roughly the same. Every basic SDLC has Planning, Design, Development, Testing, and Deployment.

At a high level, it should look something like this:



The tasks that go into prompt engineering are very similar to the SDLC. Let's map the steps.

First, you need a plan. What are you going to do? What is your purpose? For this step I would recommend using the 5P Framework. The 5Ps are Purpose, People, Process, Platform, and Performance. This framework will allow you to efficiently gather your requirements. You'll know if you need supplemental data or buy-in from other stakeholders. You'll choose your technology and have a measurable outcome. It will make the development of your prompt go more quickly.

Next, you need to design and develop your prompt. You'll outline your instructions for a generative AI system. This is where a framework like RACE is useful. RACE is Role, Action, Context, and Execution. This framework will walk you through the steps to construct your prompt, making sure you have the necessary information.

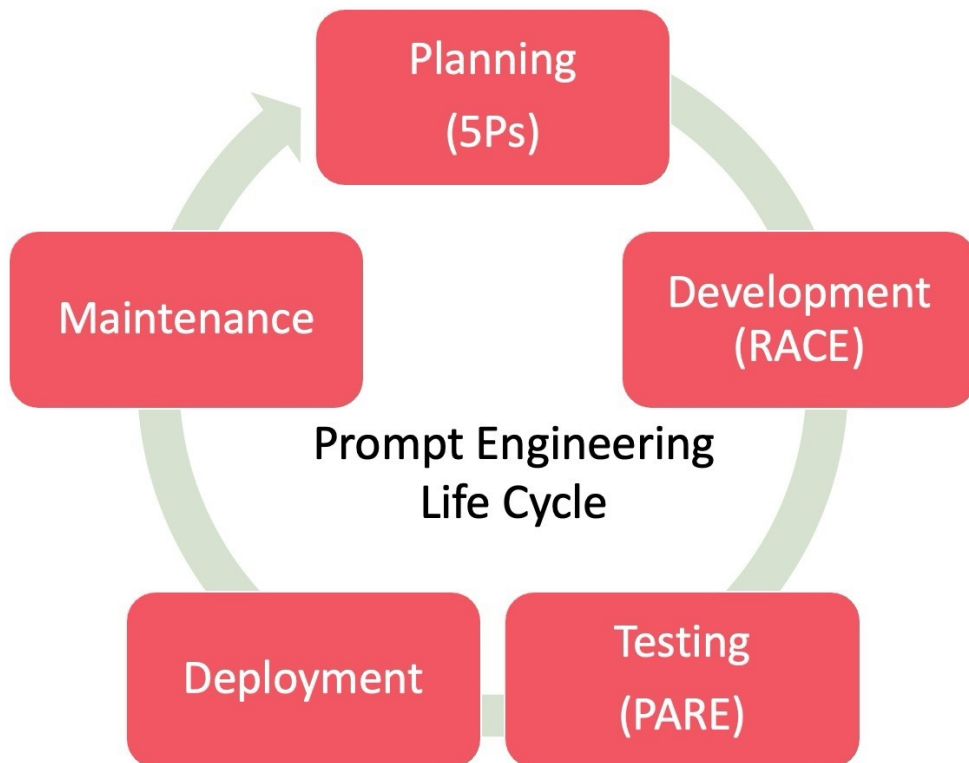
[You can grab a copy of the RACE Framework here](#)

Once you've developed your prompt you need to test the results. This is where you would use the next framework, PARE. PARE is Prime, Augment, Refresh, and Evaluate. You would use this framework to refine your outcome. You do this by asking questions and poking holes in your initial prompt. When you're engineering a prompt, you want to spend most of your time in this phase. The RACE Framework is a good start, but it's the questions that you ask the system that will get you the best results. Remember, these generative AI systems will only do what you ask and nothing more.

[You can grab a copy of the PARE Framework here](#)

If you're satisfied with your results, you can deploy it. Here, you'd save your work into your prompt library for future use. As you have new information or your goals change, you'll want to update, or maintain your prompts. At a minimum, review your prompts quarterly, or more frequently if they are heavily used.

When you put it all together, it looks something like this:



Not too different visually. The steps are the same. The take away here is that you can rely on existing frameworks that you're comfortable using to get good results. Prompt Engineering is similar to development in that you need a plan that you can test and refine. Thankfully, there are many frameworks that can help you get the best outcome.

April 24, 2024: The Downside of Short Cuts

There are no short cuts in life.

That's a lie.

There are plenty of short cuts. The question a short cut raises when presented is whether or not you should take it.

Taylor Swift's trainer has commented that she worked out six days a week and her routine would make most people sit down and cry. When she performs 3.5 hours three nights in a row, she makes it look effortless. She did not take any short cuts.

Stephen King writes for 4 hours a day, every single day. He has written over 70 books and sold over 400 million of those books world wide. His name is synonymous with horror. He did not take any short cuts.

Simone Biles trains up to 7 hours a day six days a week. She has 37 World and Olympic medals. She is the most decorated gymnast in history. She did not take any short cuts.

Why am I telling you this? Because you (and I) need to manage our expectations when it comes to success.

You cannot sneeze without some one mentioning generative AI. There are lots of real (and fake) experts out there claiming that they have the magic solution, the short cuts. Here are 5 tips, 10 prompts, 30 steps, to master generative AI today!

Here's the thing. Generative AI is software. And like any new software, there is a learning curve. Some will climb that hill faster than others. With generative AI, there are a vast number of use cases. Because of that, there are a lot of moving pieces to learn and master.

We like to pick on Chris Penn and say that he tinkers all day and night with generative AI. The truth is, he is! He's putting in the time, the hours, the practice. He's honing his skills. He's turning over every rock that generative AI puts down. When you ask him just about anything about generative AI he knows the answer.

I, on the other hand, never stop trying to understand people. I'm constantly alert to how people act. I am researching behaviors. I am learning about body language. I am finding new ways to solve old communication problems. If I really think about it, it might be why I'm so obsessed with true crime. I'm trying to understand human nature. The more I understand, the more effective I can be at my job.

When we step on stage to give a talk about AI, marketing, or something else, know that we've been working on it for months. We're building, refining, practicing, practicing more, and then recording. The goal is to step on stage and deliver a high value experience. What happens if the slides don't work? No problem. The mics aren't functional? Not an issue. We've rehearsed these scenarios so that if they happen, we're ready.

Imagine if Taylor Swift decided to step on stage without putting on all the hours she did at the gym ahead of her tour. Could she put on a show? Sure. Would it be great? Maybe the first time. But she would not have the stamina to do it over and over every night and deliver a spectacular experience. She wouldn't be able to recover between shows. She would let her fans down.

The point is that to really master something, like generative AI, there are no short cuts. If you take the hundreds of short cuts that people are offering, you're missing out on actually learning the system. You'll scrape the surface, but never really understand how it works.

This kind of discipline is a quality you want in a subject matter expert. If you're looking to bring someone into your business, to collaborate with your team, you want the best. You want someone who lives and breathes the tools. You want someone who hasn't taken short cuts.

[If you're looking for someone to help your team get up to speed on generative AI, give us a shout!](#)

May 01, 2024: Helpful, Honest, Harmless

Are you using Generative AI?

That sounds like the start of a sales pitch, doesn't it?

It's not. I promise.

I genuinely want to know if you're using Generative AI. Not only do I want to know, but I want to know if you understand how the system you're using decides what responses to give you.

I'm not going to get into technical details, that's not why you're here. There are academic papers and other articles that get into the weeds. For context, at a high level, the guiding principles for how companies, like OpenAI and Anthropic, are training Large Language Models (LLM) are HHH. HHH stands for Helpful, Honest, and Harmless.

Sounds good, right? Who wouldn't want to use a system that is helpful, honest, and harmless?

Well, let's not get ahead of ourselves.

There isn't one singular definition of helpful.

There isn't one singular definition of honest.

There isn't one singular definition of harmless.

You see where I'm going with this.

Generative AI is a great tool to integrate into your workflow. There are a lot of reasons why marketers would want to optimize their efficiencies. But this is where I am going to encourage you to read the fine print. The thing that we all say we do, but don't.

Ok, I'm actually going to ask you to do more than just that. Before you sign up for a

generative AI tool to integrate into your workflow, I want you to go through a simple exercise. The goal is to determine what you will and won't accept from a Large Language Model.

I'd like you to start by outlining your company values. When we think about helpful, honest, and harmless you should be able to tie those into what your company stands for.

As an example, here are the values that we outlined for Trust Insights:

- We reject deception and secrecy. We are transparent and honest.
- We reject laziness and stupidity. We are committed and smart.
- We reject obfuscation and bullshit. We are clear and direct.
- We reject discrimination and bias. We are fair and just.
- We reject ego and selfishness. We are humble and generous.
- We reject pigheadedness and willful ignorance. We are cooperative and aware.
- We reject gloomy and dramatic. We are cheerful and agreeable.
- We reject thoughtless acceptance of the status quo. We do better.

When I go through the exercise of selecting a piece of software, like generative AI, I want to have those values front and center. Why? Because the way that the model is trained may not align with your values. For instance, what I think is fair and just, may not resonate with you.

No, this is not normally a step you need to take when assessing software vendors. You want to take this extra step because of how companies are training the models. Unless you're getting into the code (which they won't share with you) you don't know what the companies consider helpful, honest, or harmless. You have to do your due diligence and make those judgments for yourself.

Once you have a shared understanding of your value, go ahead and read the fine print, also know as the terms and conditions. Make sure you know what you're signing up for and that you're comfortable with the software. Generative AI is rapidly evolving. So quickly that most of us feel like we can't keep up, let alone know exactly what it entails.

This is an important time in our industry to be skeptical and questioning. Someone who isn't you is deciding what is helpful. Someone who isn't you is deciding what is honest. Someone who isn't you is deciding what is harmless. You can't control that.

But you can control whether or not to use their software.

Our friends over at the [Marketing AI Institute](#) are doing a lot of work trying to understand and educate on this topic. Be sure to follow them to stay up to date as well as following our content.

May 08, 2024: Do I Still Need to Be Data-Driven?

Why are we obsessed with being data-driven? Does it matter? Does it actually give us a competitive advantage? Where does AI fit in?

Being “data-driven” is just another way to say informed decision. Can you ignore the data? Yes, many people do when the data doesn’t tell them what they want to hear. But should you at least listen? Also, yes.

Let me caveat that by saying, if you want to use your data with AI, you have to be data-driven.

Why aren’t more companies data-driven?

The benefits of being truly data-driven are clear. You know exactly what is happening. Good or bad. With that comes a lot of hard work. Collecting data is the easy part. Easy in that you can turn the systems on. Collecting the right data means requirements gathering, data governance, and maintenance. Three phrases that no team wants to hear. They might as well be curse words.

Requirements Gathering

Believe it or not, gathering requirements doesn’t have to be a long, drawn-out process. I’ve been on projects where the requirements gathering took months. This is an opportunity to use the 5P Framework with generative AI.

The 5P Framework is Purpose, People, Process, Platform, and Performance.

Start by defining your purpose and performance. What problems are you trying to solve with a CRM? What business processes do you want to improve? What insights do you need from the data? What are the outcomes you want to see?

Next, determine which people you are involving. You’ll want to figure out who owns the data, who analyzes it, who uses it, and who maintains it. In some companies, this is all the same person. In other companies, these tasks are spread out over multiple departments.

Since you already know your platform, you can start to use generative AI for the

process. You could start by asking generative AI to give you a template for data requirements. If you already have one, you can load that into the system.

Continue building your prompt by feeding the system the information you have from the 5P exercise. This will help the system put together the requirements that you need to consider.

I did this as a very simple test. I told Google Gemini that I did not have a requirements template. I also told Gemini that I was the only person in my company and what my goals for using a CRM would be. What I got back was essentially a questionnaire that I could fill out to serve as my requirements. The system asked questions about my sales cycle, what functionality I had to have, and gave me some practical considerations. The whole thing took about ten minutes.

Data Governance

This is where a lot of teams fall short with their data. I asked Google Gemini why data governance is so hard? This is what it told me:

Successful data governance necessitates:

- *Strong Executive Leadership: Getting top-down buy-in is necessary for the cultural shift and resources.*
- *Start small, scale up: Pilot projects on focused use cases help establish processes and get early wins.*
- *Invest in the right tools and people: Automated processes and skilled data stewards streamline effort.*
- *Emphasize education: Ongoing training for all employees builds data-driven culture in the long term.*

It's a solid answer. In my experience, the first two points are really where things fall apart. Good data governance is, in fact, part of a company's culture. It means following protocols and creating documentation. Basically, the things that most people really don't want to do. Without support and accountability from the top, it generally doesn't get done. The other issue, starting small, is true for a lot of initiatives. AI, for example, is also a culture shift. To find success with integration of data governance (or AI), companies need to pilot and test. It's changing process, training people, and ensuring compliance.

In regards to being data-driven, a lack of data-governance goes hand-in-hand with a lack of trustworthy data. If you're considering using generative AI to help with your

analysis tasks, you might want to evaluate your governance plan.

Maintenance

Data collection and data analysis are not one-and-done tasks. They are processes that you need to have running consistently. Once you set up a new data collection system, like a CRM, you have to maintain it. As your business changes, so should your data collection. As your team changes, so should your data collection. As your customers change, so should your data collection. Even if you review your data systems once a year, you're doing more than a lot of companies. I would personally recommend at least once a quarter.

So, do you really need to be data-driven? To make thoughtful decisions and use new tools like generative AI, yes.

If you want help becoming more data-driven, [you know how to reach me.](#)

May 15, 2024: Finding Your “Why” and Managing Expectations

Expectations are a funny thing. The ones we put on ourselves, and the ones that others put on us. It’s easy to fall into the trap of what we’re expected to do.

If you will, please indulge me for a moment, and then I’ll get to the point.

Last weekend, I celebrated my birthday. Every year, on my birthday, I make a wish for myself. This wish is an intention, something to help me keep growing. My wish for myself is to stop creating false expectations. To stop trying to meet the expectations of others. This was a result of a conversation with someone who said that what I was doing wasn’t enough. I wasn’t enough; I wasn’t meeting the expectations that they had put on me. When I was younger, I would be spiraling, trying to figure out how to fix the situation. How to be more. How to do more. As an adult with a pretty good head on my shoulders, I know that I am doing enough. That the person who feels like I’m not enough is their expectation, not mine. And I don’t have to meet it.

Thanks for that; I wanted to give some context.

The point being, we, as humans, are under constant pressure to live up to expectations that have been put on us. Whether we put them there or someone else did, we feel like we’re constantly failing. We’re falling behind. There is pressure to keep grinding and do more.

Look at what’s happening with generative AI right now. The expectation is that if you’re not a power user, you’re behind.

But who is setting that expectation? Is it the narrative we’re telling ourselves? Are we feeling this pressure from our peers and competitors?

Generative AI is still dominating the conversation. It’s hard to escape. Generative AI has infiltrated just about every aspect of our lives. Does that mean that we have to take part?

Are we doing enough?

There is no right answer here. This is where expectations enter the conversation. There are two sets of expectations to pay attention to. Those that we put on ourselves, and those that others put on us.

You cannot control the expectations that others put on you. Sorry if that's not what you wanted to hear. But you can't.

You can, however, control your own expectations. My good friend Donna Mostrom, a content writer, said, "So many people ask if I'm using AI for my writing. And yes, I am, but I don't use it to write for me. Because it doesn't fit my 'why'."

Donna points out that using generative AI does not fit her "why". She asked herself, "Why am I using generative AI? What is the benefit?" She concluded that it was not the right solution to her problem. So, the expectations of using generative AI are coming from others, not her.

If you want to do something, like use generative AI, make sure you know why. This is true of any action you take in business and in life. A good place to start is the Trust Insights 5P Framework. This will help you understand your "why" and set expectations that you are in control of.

The 5Ps are Purpose, People, Process, Platform, and Performance. In this instance, finding your "why", you want to spend the most time detailing out your purpose. Start with questions such as:

- What is the problem I'm trying to solve?
- What is the question I'm trying to answer?
- Is this even something I want to do?

Start here. Do your answers speak to your needs, or the needs of someone else?

When generative AI first became publicly available, a lot of my clients said, "We have to use it!" But there was no clear "why". When I asked more questions, the responses I received were all similar in theme. They wanted to stay competitive. They didn't want to fall behind. They wanted to do what everyone else was doing. They felt that they would be expected to use it.

These responses are a good start, but they are not specific enough. This is the trap of false expectations. Dig deeper. If you want to stay competitive, what problem are you trying to solve? Are you losing clients? Is your revenue declining? If you don't want to fall behind, what is the problem you're trying to solve? Are your processes

outdated? Does your team lack specific skills? If you are expected to use it, what problem are you being asked to solve?

Here's my big caveat - you will always have expectations from others. If you work in a company or on a team where you are serving the needs of the business, you have expectations put on you. That's normal. My point with this post is to remind you that you have some say in how deep you want to go.

Generative AI is the shiny object of the moment. The problem is that we already have so much on our plates; it feels like one more thing to do. Sure, it could help us find efficiencies and take some tasks away. But there is still a learning curve and onboarding that needs to happen.

This is why I want you to find your "why". This is why I want you to understand where the expectations are coming from. AI is a great tool and a solid solution for many companies. However, it's not going to be for everyone. It can also be a distraction. It can be a waste of resources and overcomplicate processes that were fine.

Challenge your expectations of why you're using generative AI. Ask more questions of those who want you to integrate it. The tools are changing so rapidly; it's easy to get swept away with the hype.

Start with your "why". Is it a why you feel comfortable with? Is it a why you can build a process around? Is it a why you have the people for? Is it a why you can measure? Use the 5P Framework to help get at those answers. At the end of the day, all you can do is manage expectations.

May 22, 2024: Measuring ROI in 2024

I thought I'd try an experiment this week. We've spent time internally building custom models for various purposes. I was curious how close to a polished post I could get by using a couple of them together. Here's what I did:

We've built our Ideal Customer Profile model, which includes data around pain points and goals. I asked that model to give me a list of topics our ICP would want to read more about. After some iterating, the strongest topic measuring ROI. Great, now I know what content to put together.

Next, I took that topic and opened up KatieGPT. This is the custom model we've built a few months ago based on my knowledge and content. KatieGPT is my digital doppelganger. I asked KatieGPT to write a post about measuring ROI in 2024 using the 5P Framework.

My question to you is: how did the systems do? If I hadn't told you that I didn't write this, would you know? I'd love your feedback.

Here are the AI-written results:

Measuring ROI in 2024: A Practical Guide Using the 5P Framework

Introduction

As we navigate the complexities of marketing in 2024, understanding your return on investment (ROI) is crucial. With new tools, privacy regulations, and evolving consumer behaviors, the 5P framework—Purpose, People, Process, Platform, and Performance—provides a structured approach to effectively measure and optimize your ROI.

Purpose: Define Your Goals

Start with a clear understanding of what you aim to achieve. Your goals will guide which metrics to track and how to measure success. Consider:

- **Sales Growth:** Target metrics like revenue, average order value, and conversion rates. For example, set a goal to increase online sales by 20% over

the next quarter.

- **Website Traffic:** Focus on page views, unique visitors, and bounce rates. You might aim to boost website traffic by 30% through improved SEO and content marketing strategies.
- **Customer Engagement:** Measure social media interactions, email open rates, and time on site. Set a goal to increase social media engagement by 25% through targeted campaigns and interactive content.

Clearly defining these goals ensures everyone is on the same page and that the metrics you track are aligned with your business objectives.

People: Identify Key Stakeholders

Identify who needs to be involved in your ROI measurement process. Include team members from different departments to ensure comprehensive data collection and analysis. Collaboration is key:

- **Marketing Team:** For campaign insights and execution. They can provide data on campaign performance and audience behavior.
- **Sales Team:** To correlate marketing efforts with sales outcomes. They offer insights on how marketing leads convert into sales.
- **Data Analysts:** To manage data collection, integration, and analysis. They can ensure the accuracy and relevance of the data being used.
- **IT and Compliance:** To ensure data privacy and security. They ensure all data collection practices comply with the latest regulations and standards.

Engaging all relevant stakeholders from the beginning ensures a holistic approach and that all perspectives are considered in the ROI measurement process.

Process: Establish Robust Tracking Systems

Implement processes that enable accurate data tracking across all marketing channels. This includes:

- **Multi-Channel Tracking:** Integrate data from Google Analytics 4 (GA4), CRM systems, social media analytics, and email marketing tools. For instance, set up GA4 to track user interactions on your website and use a CRM to track lead progression.
- **Data Governance:** Ensure data integrity and compliance with privacy regulations. Establish protocols for data handling, storage, and sharing to prevent data breaches and maintain user trust.
- **Regular Audits:** Conduct frequent reviews to keep your data and processes

up to date. Schedule quarterly audits to check the accuracy of your data and the effectiveness of your processes.

A well-established process ensures consistency and reliability in your data, which is critical for accurate ROI measurement.

Platform: Choose the Right Tools

Select platforms and tools that will help you gather, analyze, and visualize data effectively. Key considerations include:

- **Google Analytics 4 (GA4):** For comprehensive web and app tracking. Use GA4 to track user behavior, conversion paths, and attribution.
- **CRM Systems:** For tracking customer interactions and sales data. Tools like Salesforce or HubSpot can help manage and analyze customer data.
- **Social Media Analytics:** To measure engagement and performance on social platforms. Use tools like Hootsuite or Sprout Social to track social media metrics.
- **Marketing Automation Tools:** For tracking email campaigns and customer journeys. Platforms like Mailchimp or Marketo can automate and analyze email marketing efforts.

Choosing the right tools ensures that you've got the necessary capabilities to track, analyze, and report on your marketing activities.

Performance: Measure and Optimize

Focus on performance metrics that align with your goals and provide actionable insights:

- **ROI Calculation:** Use the formula $(\text{Net Profit} / \text{Cost of Investment}) \times 100$ to determine your return. For example, if your campaign generated \$50,000 in revenue with a \$10,000 investment, your ROI would be 400%.
- **Predictive Analytics:** Employ machine learning tools to forecast trends and optimize future campaigns. Tools like IBM Watson or Google Cloud AI can help predict customer behavior and campaign outcomes.
- **Marketing Mix Modeling (MMM):** Analyze how different marketing channels contribute to overall performance. MMM can help identify which channels are most effective and where to allocate your budget for maximum impact.

Applying the 5P Framework to Measure ROI

4. **Purpose:** Set specific goals such as increasing online sales by 20% over the next quarter, improving website traffic by 30%, and boosting social media

engagement by 25%.

5. **People:** Involve your marketing, sales, data analytics, and IT teams to ensure all aspects of your campaign are tracked and analyzed. Ensure each team understands their role and the importance of their contributions.
6. **Process:** Establish robust tracking systems to monitor user interactions from the first touchpoint to the final sale. Conduct regular audits to ensure data accuracy and compliance.
7. **Platform:** Utilize GA4 to track web traffic, your CRM to monitor sales data, and social media analytics tools to measure engagement. Ensure seamless integration across these platforms for a comprehensive view.
8. **Performance:** Calculate your ROI using the $(\text{Net Profit} / \text{Cost of Investment}) \times 100$ formula. Use predictive analytics to forecast future performance and adjust strategies accordingly. Leverage MMM to optimize your marketing mix.

Conclusion

Using the 5P framework—Purpose, People, Process, Platform, and Performance—you can effectively measure and optimize your ROI in 2024. This structured approach ensures that all aspects of your marketing efforts are aligned, tracked, and analyzed, providing you with actionable insights to drive success.

May 29, 2024: Do Your Customers Want You to Use AI?

You've probably heard people say, "AI will do this, those skills are going to be irrelevant."

Last weekend, I had a conversation with a good friend, and she was telling me that her guests were praising the food she had cooked. They talked about the quality and the taste. She let them know that instead of purchasing the products at a well-known, allegedly organic grocery store, she opted to purchase her goods from a small business where things were hand-cut and hand made.

This isn't a new thing - the opposition between small business and big chain stores. But it's even more important now, especially with generative AI.

Those same people who tell you that AI can do the jobs that were once done by humans are right. Those jobs can be done by AI. That doesn't mean that people want it or will buy it.

There are industries, like marketing, where using AI makes a lot of sense. Process development and optimization with AI mean that you can do more meaningful work. You can spend your time building relationships and creating engaging content. You can dig deep and get to know your audience.

So this begs the (now) age-old question: will AI make it better?

In some cases, yes. It will optimize what you're doing. We were talking with an educational institution earlier this week and there were a lot of opportunities to use AI. It would enhance data organization and search for their members, allowing them to more quickly access much-needed resources.

But in the case of a butcher shop, AI might enhance ordering, but not the product. In 2017, it was publicly announced that [Amazon had acquired Whole Foods](#). The original mission and vision of Whole Foods was to fit in and become part of the community. Each store was unique to its neighborhood, and they carried products local to those regions. Today, with Amazon at the helm, there is less customization and more mass production. What the consumer sees is that quality has gone down, and there is nothing unique or special about the items being carried anymore.

In 2024, there have been 25 product recalls, according to the USDA. There are about 70 recalls on average per year. When you look at where the recalls came from, they aren't generally small businesses. They are the companies with large factories that are mass producing products. They rely on process automation and AI to execute the majority of their businesses.

What does that mean for you? Among all the conversations about AI taking over, there's still a need for non-AI skills. There's still a demand for handcrafted products. That includes what you create as a marketer.

Talk to your audience. Find out what they value. It comes back to understanding your Ideal Customer Profile, which ironically, [you can create using AI](#). But, regardless of how you arrive at your results, understanding your customer will drive whether and where you integrate AI into your business.

Before you bring AI into everything, make sure you know who your customer is and what they value. Use this insight as your guideline for where the use of AI makes sense and where it could hurt your customers.

June 05, 2024: Getting to the Root of the Problem

Over the weekend, I noticed that I had poison ivy growing within my hydrangeas. I wanted it gone. I'm allergic to poison ivy and being an invasive plant, it spreads fast if you don't remove it. After putting on disposable gloves, I started pulling out the plant. The leaves can be small and unassuming. I pulled up as many as I saw, disposed of them, and patted myself on the back for a job well done (after washing my hands).

When I went out the next day, I saw new growth. I thought I'd gotten it all, but I'd clearly missed something. Again, with a fresh set of gloves, I pulled the plant. The new leaves came up easily. But, this is the same thing I did the day before, right? And it didn't work. That's why I'm doing this all over again.

Here's the thing about poison ivy. The plant isn't deep, but its roots spread wide. The roots of a single plant can spread 20 feet underground. Yikes! Only pulling what you can see isn't going to cut it. There's a lot more buried underground, waiting to surface over and over.

The root of my problem is a literal root. A little on the nose, right?

When companies start evaluating solutions, the root of the problem is often missed. Shiny object syndrome gets the best of us as we get swept up in the excitement of what's possible.

You have to dig. You can pull at the leaves that you can see, but your problems likely go deeper. This is where user stories really shine.

As a reminder, a user story is a simple, three-part sentence.

As a [persona], I [want to], so [that].

This is a great way to back into the [Trust Insights 5P Framework](#) when your purpose is a little murky.

The 5Ps are Purpose, People, Process, Platform, and Performance. A user story neatly maps to the 5Ps. The "persona" tells you the people. The "want to" tells you

process and platform. The “that” tells you the purpose and performance. You can reverse engineer the 5Ps by generating a series of user stories.

When creating user stories, many people get as far as “As a [persona], I [want to]”. The last part of the sentence, which is the intention, gets forgotten. This is when you start solving for the wrong problem, or not getting to the root. Why did I want the poison ivy gone? What would happen if I keep letting it come back?

I could go outside every day and only pull out the leaves of the poison ivy that I see. But it will keep coming back. I have to dig. I have to do my research. I have to explore the options. If my goal is to be rid of this plant altogether, pulling the leaves when I see them won’t work.

When I went out for the second time to pull up the poison ivy, I dug deeper. I found the root of the plant. It was huge! Since I pulled that out, I haven’t seen any more leaves lurking about.

I thought about using AI as an example this week, but it’s true for any business problem. Unless you’re digging deep and getting to the root, you’re not solving the right problem. Keep asking why. Dig into the intention. Find the root.

Why do you want to use AI? Is it because everyone else is, or do you have a solid user story? Why do you need a new CRM? Is it lacking functionality, or aren’t you using everything you have? Why isn’t Google Analytics telling you what you need to know? Is it an infrastructure issue, a data issue, or it’s a human issue? Outline your intentions. Get to the “why”. Keep digging so that you’re solving the right problem.

June 12, 2024: Do You Need to Keep Universal Analytics Data?

In case you weren't aware, your access to Universal Analytics (UA) data is being cut on [July 1, 2024](#). To that, your UA property stopped collecting data on July 1, 2023. In a nutshell, UA has been sitting dormant for almost a year, and you won't be able to get at the data in a few weeks.

If I had to wager a guess, you haven't thought too much about your UA data. Until now. Until you're reminded that it's about to be taken away from you. NO!!

Well, hold on. Do you *need* that data or do you *want* that data? There are some companies that have requirements to hold onto their historical UA data. Those companies have likely already exported that data into a different system. For the rest of us procrastinators, we're likely exchanging "should we" emails with our IT team.

Depending on the structure of your company, extracting the data could be simple or highly complicated. The IT team will have questions and concerns. And I would also guarantee that it's not their highest priority. Especially given that it's last minute.

Before getting ahead of yourself, let's walk through how to determine if all this is necessary.

We're going to use the [Trust Insight 5P Framework](#) to audit our need to preserve UA data.

The 5Ps are Purpose, People, Process, Platform, and Performance. The framework is an efficient decision-making tool. Rather than spending hours creating piles of documentation, the 5Ps can walk you through what's most important and where to focus.

Purpose: Define Your Objectives

Before you start any project or initiative, you should have a well-defined purpose. Without one, you could potentially waste time, resources, and budget. So, let's try

not to do that.

What is the primary reason for accessing historical UA data? This is the question you need to start with to define your purpose. This is where you'll suss out whether you want or need the data.

A good starting place is your business goals. What are they? Does Google Analytics support those goals? Where does GA fit into your tech stack and reporting process?

When Google switched from UA to Google Analytics 4, many companies stopped using the data. The system felt cumbersome, and the data untrustworthy. The new system doesn't cleanly map to the old data set. This is where you'll look at the kind of reporting you're currently doing. Are you doing trend analysis? Do you have year-over-year comparisons? How reliant are you on the data from Google Analytics.

If the answer is that you're not using it, that is where you can stop your audit. You don't need to export and retain the historical UA data.

However, if you find that you do need the data, let's keep walking through the rest of the P to see how to approach extraction.

People: Identify Stakeholders and Responsibilities

First, who needs access to this data once you've extracted it? This information will help when you get to process and platform.

User stories will help with gathering information in this section. A user story is a simple, three-part sentence.

"As a [persona], I [want to], so [that]."

For each stakeholder, develop a user story. You may find that there are stakeholders who don't need to be as involved. You may also find that there are team members who have larger needs. For example:

As the IT lead, I need a secure place to store historical UA data, so that the company can meet compliance standards. As the marketing manager, I need easy access to historical UA data, so that I can use it in reporting. As the analyst, I need access to

historical channel data, so that I can continually measure marketing efforts.

The IT team needs the data to be secure, but the marketing team needs it to be accessible. That might mean you need more than one solution.

Be sure to capture all those user stories before moving on to process and platform.

Process: Outline the Workflow

Using the information from the user stories, you can outline the extraction process.

Questions you should answer with your process development are:

- What data is most important?
- Do you need all the metrics and dimensions or a select few?
- How far back should the data go?
- How often will we need to access the data? What is the frequency? Do we get ad hoc analysis requests?

Platform: Evaluate Tools and Infrastructure

When faced with a decision that is time-sensitive, the default is to choose tools first. However, we've already seen that we need a tool that is both secure and easy to use. This could be a platform you already have in your tech stack, or a new tool that you need to bring on.

Questions you should answer with your platform evaluation:

- How secure is the tool?
- Does it meet our compliance standards?
- What are the import/export features available?
- Can a non-technical person easily extract data from it?
- How well does the platform integrate with the existing tech stack? Does it need to?
- How will you ensure data quality? **Performance: Measure twice, export once**

How do you measure success? Go back to your purpose. Why do you need UA data?

Your easiest performance measure is whether you've solved the problem. Are you meeting compliance standards? Are you able to continue trend analysis or year-over-year reporting?

Also, you want to set up milestone measures to track your progress. Given that you only have a couple of weeks before you lose access to this data, this might be your most important measure. Did we do it before July 1, 2024?

If you find yourself on an email chain or sitting in a meeting asking “should we save our UA data?” - start with the 5Ps. Walk through them with your team and use the framework to get everyone on the same page. Assess the need or want. Use the data to make a measurable plan.

Happy extracting!

June 19, 2024: Preventing Your Projects from Being Derailed

I'm in the middle of a kitchen renovation. If you've ever been through one, you know the experience can be stressful. Your level of involvement is likely tied to just how stressful it gets. I'll be honest, I'm not handy. I'm a menace with sharp objects, or even blunt ones. But those who know me know that I am excellent at bossing people around, getting answers, and making sure things get done.

So here I am, knee-deep in construction, shocked to find out that not once, but twice, I'm the bottleneck in the process. The first time was when I was told the project could not move forward until I physically showed up somewhere to approve materials. The second time was when I hadn't paid the outstanding balance.

Both of these things seem like easy fixes, right? Sure. They were. Except for the fact that I wasn't aware these were things that needed to be done. Let me clarify: Yes, I knew I needed to pick and approve materials. And yes, I knew I needed to pay the balance. That wasn't the issue. The issue was how the process was unfolding and the lack of clarity and instruction. Not knowing what my role was, or assuming I didn't have one, has held up the project from moving forward. In the first instance, I had already chosen the materials. I wasn't told until the time came that, despite already choosing the materials and having it detailed on the work order, I needed to re-choose materials. In the second instance, I incorrectly assumed that when my credit card was charged initially, it would be charged when the next payment was due. So here I was, looking at a zero balance on my card and holding the work order with the chosen materials, scratching my head trying to figure out how I had screwed this all up.

I tell you this because having a clearly defined process is the key to success for any project. Generative AI is still dominating the conversation. Marketers are being asked every single day to figure out how to integrate it into their workflow. We're being asked to move faster, create more, and save money. It's a big ask, but it's not impossible. You can do it with good process development.

Why do we struggle with process? In my experience, process is a dirty word. To document it, to explain what you're doing, takes too long. It's faster just to do it. Chris, for example, is someone who moves very fast. He'll get an idea and start to hammer away at it on his computer until he gets results. He'll show us the results, and when we get excited to start using the new thing, the bottom drops out. He

doesn't remember what he did or how to replicate it. Womp. Womp.

In this instance, it's just Chris, and he can retrace his steps to document a process. When you start to include more people, larger teams, and lots of technology, it becomes increasingly difficult to retrace and replicate. This is why process development is essential from the start.

If your company is undergoing a digital transformation, the steps can be murky. Think about introducing tech like generative AI into your workflow. There are a lot of moving pieces and likely a lot of questions to answer. People want to know where they fit in and what they'll be doing. You'll want to know what the existing processes are and where generative AI fits in. You'll need to evaluate what tools you're currently using and if generative AI will replace those. You'll need to have a grasp on the existing process so you can adjust them for the new technology. Digital transformation often goes wrong because the emphasis is on the outcome and the technology. The focus, however, should be on the people and process. More often, projects go sideways when the emphasis is on the platform.

The good news is that the [5P Framework](#) can help you out. The 5Ps are Purpose, People, Process, Platform, and Performance. Not only do you want to know what the process is, but who is involved, what tools you need, and how to measure success.

In my case, my purpose is a renovated kitchen that includes new cabinets and counters. When I get to people and process, these are the pieces of the project that have been the least defined, and where we've run into roadblocks. I was talking to a customer support person last week as I was trying to resolve some of the blocks. She said, "I wish they would just write out a checklist for the homeowner that told them step by step what would happen and what they were responsible for." I couldn't agree more. Because the process was missing, the whole project could have fallen apart and been delayed.

While my example is small potatoes, it could have gone very wrong. Aside from me, there are four other vendors involved that I'm coordinating. Finding the point of failure in the process could have been really challenging. At a larger company, there are more people, more moving pieces, and more points of failure. You might have a difficult time determining where things are stuck and who is the bottleneck. This results in a waste of time, money, and resources.

If you're in the midst of a project that seems to not be moving forward, check your

process. Is it clear? Look at your people. Do they know what they're responsible for? A lack of understanding of responsibility can seriously derail things, and many times the person doing the derailing isn't even aware. It can cause frustration all around. Especially if the person who plays a vital role, and isn't aware, is being asked to do big things with no notice.

Take a moment to run through the 5Ps, even if you've already started a project.

- Purpose: Do you have a specific problem you're trying to solve?
- People: Do all the involved parties know what their responsibilities are?
- Process: Are all the steps of the project defined and communicated?
- Platform: Are all the tools and materials chosen and approved?
- Performance: Is there a clear measure of success?

Use the 5Ps as a quick gut check to see if there are any sticking points. It's never too late to adjust a project, especially if there are parts that need better transparency.

June 26, 2024: Assumptions Of Time

I wrote about making assumptions about people's time on LinkedIn the other day. Given the responses, I think it's worth bringing up again. [Here is the original post:](#)

Don't use the excuse of assuming someone is "too busy" to not loop them in.

From your side, you might think you're "protecting" their time or their calendar. Your intentions are good, but they aren't helpful.

The person who is being told that they are "too busy" is hearing, "we don't think you care enough to prioritize this, so we didn't bother."

Miscommunication is easy. Good communication is hard. Trust is even harder.

I've told my team over and over, "you're not bothering me. If I can't do something, I'll let you know." But it doesn't always stick.

We're all dealing with some kind of trauma from being lied to, being misled, being gaslit. It's hard on both sides. When I'm told that it was assumed I'm too busy to be looped in, my default is that I'm not trying hard enough.

The best way forward is to be direct. Try to take what someone is saying at face value. Acknowledge that building trust is an imperfect process. To build trust, you've got to give people a chance. Otherwise, you won't break the cycle.

I would also add that starting an ask with "I'm sorry to bother you" begins the interaction on the wrong foot for both parties.

A better option is, "I have a few things to ask/cover with you. Is this a good time?" Instead of "being a bother" you're allowing the other person to choose for themselves.

It's important to highlight where communication will break down. Especially as technology makes it easier and easier for us to disconnect from each other. In this example, you're taking choices away from the person you're protecting. You're not giving them the option to say if they can or cannot participate. You've already told them they aren't participating. Instead of being helpful, it can be hurtful. The more

this happens, the more the person who is “busy” gets excluded from important things. It can create the illusion that the “busy” person doesn’t try to prioritize well.

We can’t know what’s going on with someone else at all times. What they think is important and what you tell them is important to them are different things. As it is, we have texts, emails, chats, social media, and a bunch of other technology that keeps us from interacting with each other. It means that when we have to try harder to have good communication, to build trust with each other.

July 03, 2024: Quick Tips for Agile Marketing

As we step into the week of the 4th of July, we know many of you are gearing up for some well-deserved downtime. While this week might be a bit quieter, I wanted to bring you some quick, valuable insights. There's no need to go hard this week.

We're all looking for ways to move smarter and faster. Agile best practices can help you and your team be more efficient. Here is some actionable advice that can help you make quick, impactful adjustments to your strategies.

Enjoy the insights, and have a fantastic 4th of July!

Quick Tips for Agile Marketing:

- 1. Embrace Real-Time Data:**
 - Leverage analytics tools to get real-time insights into your campaign performance. This allows you to make swift adjustments based on what's working and what's not.
- 2. Stay Ahead with Trend Monitoring:**
 - Keep an eye on industry trends and be ready to pivot your strategy to align with new opportunities or shifts in the market.
- 3. Empower Your Team:**
 - Foster a culture where your team feels confident to make quick decisions and propose innovative ideas. Agile teams can adapt faster and more efficiently.
- 4. Simplify Your Processes:**
 - Streamline your marketing processes to reduce bottlenecks. Simplified workflows enable quicker execution of new strategies and tactics.
- 5. Test and Learn:**
 - Implement small-scale tests to gauge the effectiveness of new approaches before rolling them out on a larger scale. This minimizes risk and maximizes learning.

July 10, 2024: Developing a Sustainable AI Integration Strategy

Well, hey there!

Let's chat about a topic that's been buzzing around boardrooms and strategy meetings: integrating AI into your business. AI has transformative potential, but the real challenge lies in shifting from short-term wins to a sustainable, long-term strategy.

Many businesses fall into the trap of short-term thinking when integrating AI; they want instant gratification. It's tempting to chase quick wins without considering the long-term implications. "That's a problem for another day," and then, lo and behold, that day is here.

Let's use the [Trust Insights 5P Framework](#) to walk through this in a more pragmatic way: Purpose, People, Process, Platform, and Performance. This framework offers a structured approach to ensure that your AI strategy is not only robust, but also sustainable and adaptable.

Purpose

Start with why—always. This is the key to your success with any initiative. You will need your teams to get on board, and they will want to know why you're asking. "Purpose" in AI integration means having a clear, aligned goal that supports your business objectives. Think of it as the foundation of your strategy—without a solid purpose, efforts can become scattered and ineffective.

To solve the right problems with AI, you need to dig deep: clearly define the problem you're aiming to solve to avoid addressing symptoms rather than root causes. Don't start with AI as the solution. Clearly state your business problems and why they're problems. Are you trying to increase revenue? Are you wanting to find efficiencies? Do you need to cut costs?

People

People are at the heart of any initiative. Once you know your purpose, you want to

identify key stakeholders and team members. If this is a top-down business strategy where you're wanting to integrate AI throughout, every single person in your company is involved. You're talking about a culture shift. You're undergoing essentially a digital transformation. Yes, it pained me to use that term, but it's not incorrect. AI integration isn't just a tech project; it's an initiative requiring cross-departmental collaboration. You need everyone on board for AI integration to be successful.

How do you get people to understand their role?

This is where I like to bust out user stories. A user story is a simple, three-part sentence:

"As a [persona], I [want to], so [that]."

Your goal is to get a user story from each and every person in your company, anchored to your purpose. Your purpose is the "so that". So that, "we can increase our revenue". What these user stories tell you is more about the needs of each person. It is also a chance for everyone to have a voice and be heard. You can then compile all the user stories you have collected and move on to how you're going to approach AI integration.

Process

Process is your "how". And sadly, this step (aside from people) is most often skipped. Why? Because it takes patience to walk through each step and document what you're doing. Sure, you can use tools that help with this, but it still needs to be done. Too often, we're moving quickly, we get excited, and then we do something. When we're showing the outcome, people will naturally ask, "how did you do it?" If your response is, "I don't know" or "I can't remember," your chances of scalability and sustainability are zero. Document your process. You can start with a small proof of concept to demonstrate how valuable documentation can be. Use this step to build out training materials. When people see a clear direction, they are more likely to participate. Set them up for success by developing your processes. Develop a repeatable and scalable process for AI integration. Start with a pilot project to test and refine your approach before full-scale implementation.

Platform

I've talked about people and process being the most skipped steps. Platform is the step that too many people immediately jump to. "I found this great tool, let's use it!" I'm asking, nay, begging you to not lead with the platform. Why? When you choose the tool first, you get locked into only what the tool can do, not the problems you're trying to solve. When building a business strategy around AI integration, tool selection should be the last thing you consider. After talking to your people and mapping out a process, then evaluate tools.

Obviously, you want to pick tools that fit your business needs. But, also consider scalability, security, and interoperability when evaluating options. This is where we hark back to cross-functional collaboration. Make sure your IT, Dev, and other technical teams have done user stories so that their needs are represented in the tools. You might also want to extend the selection committee to include members across all teams in your organization.

Some questions to consider when selecting a new tool for your stack:

- Do we have the existing infrastructure to support this tool, or do we have to build it?
- Do we have the people to set up and maintain these tools?
- Do we know how secure our data will be? **Performance**

And now, for the grand finale! Any effort you undertake should be measurable, and that measurement should tie back to your purpose. If your purpose was "to increase revenue," that is your measure of success.

To make your performance more actionable, set milestones that you want to hit. Make sure you're tracking and reviewing your progress regularly. The metrics to track should come from your KPI (Key Performance Indicator) map. These metrics should all tie back to your overall business goal, your purpose.

For example, if your purpose is to increase revenue, you'll want to track activities that generate revenue. As you drill down, you'll want to tie those activities to ones that you executed using AI. While you're integrating AI, the best way to see if AI is effective is to conduct an A/B test. This means running a test side by side with efforts that do not use AI and efforts that do. Your goal is to understand whether using AI is resulting in more revenue or not.

So. Use the 5P Framework. Slow down. Be clear on your purpose. Talk to your people. Develop your processes. THEN, choose an AI tool (or set of tools) to

integrate into your business. Measure your progress.

Quick plug: Trust Insights can help you do this audit. [Give us a shout if you want to talk!](#)

July 17, 2024: What is Corporate Culture?

When I talk about integrating AI into your company, I talk about how it's a culture shift. The response I get to that statement is usually, "What if we don't know what our culture is?"

I asked our Slack community, [Analytics for Marketers](#), how they define corporate culture. Here are some of the responses:

Seems to be that for culture to work, your values must be:

- 1. Defined in a clear and concise way*
- 2. Rooted in actions, not beliefs. if these two are covered, then also:*
- 3. Understood by everyone - ideally before being hired - where they learn it once, but that message is reinforced through action in more organic ways where it isn't forced down an employees throat - giving people the opportunity to continually buy-in*

It's the outline of what is acceptable and what isn't that is unique to a company

Culture is one of those things that you know when you see it.

I've found that a lot of organizations have become antagonistic internally, often out of necessity with all the layoffs and restructures, and the looming threat of AI. That makes it difficult to build a culture that's more than just a section in the employee handbook.

Oh, this is a great question. There's no commonly accepted definition so discussions go all over the place. Company culture definitions usually include leadership, how people are treated, how customers are dealt with, how work gets done.

I think it's interesting to apply elements of culture in general to a company: What are the:

- 1. Norms*
- 2. Values*
- 3. Language*
- 4. Symbols*
- 5. Artifacts*

The thinking is that corporate culture is how you're treated and what's acceptable. For example, I used to work at a company where the VP would openly scream at me and others during team meetings. That was accepted behavior. That VP never faced consequences for his actions. It created an environment of stress and fear. It became challenging to care about the work when you had to wonder when you were getting yelled at next. You became terrified to step out of line or give bad news. It led to a lot of resentment and turnover from team members.

There's a quote, "you reap what you sow," that applies well to how you should approach corporate culture. It's the old, "treat people the way you want to be treated". Ok, enough throwing quotes at you. So, what is corporate culture and why does it matter?

Think about it as your business guidelines. Are you promoting transparency and productive conversation, or are you encouraging performance plans as easy solutions? Are you tolerating bad behavior from one staff member and chastising others? Are you setting the tone and leading by example? It doesn't matter what your role is, your attitude and actions are a reflection of your environment. If you show up to work every day and you hate what you do, and you can't tolerate your coworkers, that's a toxic culture. Whether you're bringing that negativity to the table, or you've inherited it, you need to make a change.

Toxic culture can bring down a business. If you're wanting to make a transformation, like integrating AI into your company, you need to do a temperature check. Are your people happy? Are they productive? Are they an accurate representation of your company? AI is a culture shift. Why? Because you're changing how your business runs. You're asking your staff for different skills and outputs. You're evolving the products and services that you sell to your customers. You're adapting the processes of how work gets done. You're giving your team new measures of success.

Take a minute and assess your company culture. Do you like what you see? If you don't, you'll need to fix those problems before introducing AI or other changes into the fold.

July 24, 2024: How to Get Involved

Four and a half, almost five years ago, I wrote this post about how to get involved and volunteer your time. Given where the world is today, it feels like the right time to refresh it.

[You can read the original post here.](#)

I'm seeing a lot of people on social media asking how they can get involved, so I'll offer a few suggestions.

Join a community

Whether it's virtual or in-person, finding like-minded people is a great place to start. There are countless Slack, Discord, and social media groups that are passion-focused. If you're interested in analytics and marketing (and AI and being unhinged) you can join our free Slack community, [Analytics for Marketers](#).

In writing this, I learned that there are a lot of platforms where you can find your people. Some of which are newer to me! There is likely a group that shares your interests. Here are a couple of handy links to get you started:

- [How to search Discord Servers](#)
- [Best community platforms in 2024](#)
- [How to find your community online](#)

Volunteer your time

Since writing the original post, I've started volunteering weekly at a [local animal shelter](#). It's only a couple of hours a week, but I know that while I'm there, I'm making a difference and helping the pups find forever homes. There is no shortage of organizations that will welcome people willing to donate their time. Volunteering doesn't always have to be something that you do in person, either. You can offer up your professional skills as well. Volunteering is also a low-risk way to step outside of your comfort zone and try new things.

If you're not sure where to start, check in with your town hall or library. They should have a list of local organizations looking for volunteers. If not, they can point you to additional resources. If you want to do your own research, here are a few websites

you can start with:

- [Volunteer Match](#)
- [Volunteer.gov](#)
- [30 websites to get you started](#)

Additionally, you can ask around in the communities that you join. Networking with your groups is the best way to find the right information.

I'll keep it brief this week. Change happens when you get involved. If you're spending your time on social media, share information and uplift others. Use your voice and your platform to educate. Find people you connect with and have shared interests. Getting involved with what you're passionate about doesn't have to look a certain way. Do what makes sense for you.

July 31, 2024: How Do You Convince the Unconvinced?

AI isn't for me. AI will take my job. I can do it better than AI.

Trust me. Most days I'm in the "unconvinced" category. However, when I come across a use case that resonates, I'm on team AI all the way.

In the 2024 State of Marketing AI Report from the Marketing AI Institute, they asked marketers about the barriers to AI adoption. The top responses were a lack of education and training (67%) and a lack of awareness or understanding (56%).

Barriers to Adoption of AI	Percentage of Respondents
Lack of education and training	67%
Lack of awareness or understanding	56%
Lack of strategy	43%
Lack of talent with the right skill sets	40%
Lack of resources	38%
Fear or mistrust of AI	33%
Lack of ownership or governance	30%
Lack of executive support or vision	28%
Lack of technology infrastructure	27%
Unknown risks	25%
Lack of the right data	23%
Unrealistic expectations	21%
None of the above	4%

n = 1,755

Barriers to AI Adoption

[You can get your copy here.](#)

Those are big numbers. For any given person, giving them more resources isn't going to solve the problem. There are a lot of options to choose from when it comes to AI systems that marketers could use. It's overwhelming.

In talking with other marketers, a lot of us (myself included) give up before we even

get started. The report also talks about the lack of AI roadmaps and AI counsel. These deficiencies make it challenging for marketers to understand why and how they can use generative AI.

So, how do you convince the unconvinced?

There are a lot of misconceptions around the integration of AI. For example, generative AI is an all-or-nothing approach. It either does your job or doesn't. It can do things better than you, so you are now irrelevant. It's better, smarter, and faster than humans.

You can bust these myths for your team, but you might not like the answer. Sorry, not sorry. The answer is process documentation. It's a necessary evil. Or in my case, it's heaven. Good process documentation means you know what's going on. You know how work is getting done. You know how long it's taking. You know how repeatable and scalable it is. And you can figure out how much people love or loathe it.

A good framework to start with is the [Trust Insights TRIPS Framework](#). In this simple framework, you can gather a lot of critical information. It's an efficient way to prioritize your process documentation. The core elements are Time, Repeatability, Importance, Pleasantness, and Sufficient Data. You can set this up as a spreadsheet with numerical inputs. Your rankings will help you focus on the high-value and least-liked tasks.

From there, you can explore the task itself. How does it get done? How many people are completing the task? What are the steps?

Once you have the process documented, you can figure out where AI fits. By involving your team every step of the way, they have ownership and can give input. If there are tasks that take a longer time to complete but that people love, focus elsewhere first. Or you can figure out if there are parts of the task where generative AI can support but not take the whole thing.

To convince the unconvinced, you need to meet people where they are. You need to listen to them. They need to be part of the change, not have it thrust upon them. Generative AI is going to get smarter, faster, and better. Marketers need to understand how to work with it, not fight against it.

August 07, 2024: Is Generative AI All or Nothing?

Chris asked me about how to convince someone that they should use generative AI. In last week's newsletter, I wrote about how process development is going to be critical. This week I wanted to try an experiment. Not to turn you away from using generative AI, but perhaps to help those who feel like AI is all or nothing. To write this week's post, I used three different AI models. First, I used KatieGPT. This is the LLM we built using my voice and catalog of writing. Next, I ran the post through the Trust Insights ICP-GPT. This is the model we built using our Ideal Customer Profile. I gave ICP-GPT the post and asked for recommendations to make the post more relevant to our ICP. Lastly, I copied the post into Hemingwayapp AI editor and only used the AI suggestions for rewriting. Mostly only the AI suggestions. Some of it was incoherent, to be honest.

Here is the 99% AI-generated post:

As AI becomes part of our daily work, leadership must focus on emotional intelligence (EI) more than ever. As leaders, we must balance AI's efficiencies with our human need for empathy, understanding, and connection.

Developing Emotional Intelligence in Leadership During the AI Era

As we embrace AI's advancements, we must remember our teams are made up of individuals. They have unique emotions, perspectives, and needs. The tech can optimize processes and provide insights. But, we need emotional intelligence to manage complex human interactions. It helps us keep a motivated, cohesive workforce.

Here are key areas to focus on:

1. Self-Awareness

Recognize your own emotions and how they impact your decisions. In an AI-driven world, data can overshadow human intuition. So, be self-aware. It will keep you grounded and aligned with your values.

2. Self-Regulation

Adaptability is crucial. AI tools can create rapid changes in workflows and expectations. Leaders who can manage stress will set a positive example for their teams. This will foster a resilient, adaptable culture.

3. Motivation

Use AI to identify opportunities for team growth and improvement. However, intrinsic motivation – the drive from within – is nurtured by a leader’s ability to inspire. They must align team goals with individual passions and aspirations.

4. Empathy

AI can analyze patterns and predict behaviors, but empathy allows leaders to understand the context behind the data. It helps in addressing concerns, recognizing efforts, and building stronger, more trusting relationships.

5. Social Skills

Communication remains at the heart of effective leadership. Leveraging AI for enhanced data communication can improve transparency and trust. But it’s your ability to listen, resolve conflicts, and lead through influence that will ultimately drive success.

Practical Steps to Enhance EI in an AI-Driven Workplace

1. Regular Check-Ins

Use AI tools to track team performance and well-being. Also, schedule regular one-on-one and team meetings to discuss these insights. This humanizes the data and shows your commitment to their development and welfare.

2. Feedback Loops

Create systems where feedback is continuous and goes both ways. AI can help collect and analyze this feedback. But, it’s your response that shows empathy and a commitment to improve.

3. Personalized Development Plans

AI can find skill gaps and growth opportunities. But, it must tailor development plans to each team member's career and personal goals. This approach shows respect for their unique journey and fosters deeper engagement.

4. Transparent Communication

Utilize AI to enhance data transparency. Explain how AI-driven decisions are made and involve your team in the process. This builds trust and reduces anxiety around the unknown aspects of AI.

5. Promote Collaboration

Encourage cross-functional collaboration by using AI to identify potential synergies and foster connections. Celebrate collective achievements to strengthen team unity and shared purpose.

The Balance Between AI and EI

AI is a powerful tool for efficiency and insight. But, it is our emotional intelligence that will ensure its effective integration into our workflows. By merging these two forces, we can create a workplace that is both high-tech and human-centered. As leaders, we must use AI to support our teams. We must do this while being empathetic and understanding.

By focusing on these aspects, we can thrive in the AI era. We must ensure our leadership is both effective and compassionate.

How do you balance AI and EI? Reach out and tell me, or join the conversation in our free Slack group, [Analytics for Marketers!](#)

Ok, Katie here again. The post isn't terrible. But it's not up to my standards of writing. It lacks personality, anecdotes that only I know, and heart. Overall, I'd give this post about a C, C+ to be generous.

I did this not to show you that you shouldn't use AI. You should where it makes sense. I did this exercise to show those that are worried that AI will take their jobs

and steal their creativity that AI isn't you. You are what makes an AI output better. I can use KatieGPT to help generate ideas. I can use ICP-GPT, to gut check. I can use Hemingwaypp AI editor to help polish. But at the core, I have to do the work. I am the subject matter expert, not the other way around. Generative AI will and should play a supporting role in your job.

Like I said in [last week's newsletter](#), process documentation will help you figure out where AI fits. It may help automate whole tasks, or just parts. You are in control of it, not the other way around. If you have your feet firmly planted in the "AI will take my job" camp, read this post again. It's not me. Only I can write like me. AI will get good, but it doesn't know what I know or how I feel. There is a time and place for this kind of streamlined writing in my workflow. I will probably reuse this AI-generated content for something else, like a series of quick tips on LinkedIn. I've gotten past feeling like AI will take my job. I'm now working on where AI can better support me so I can do more high-value work.

August 14, 2024: The Power of Human Connection in Marketing

Over this past weekend, I volunteered some time at the info booth for an animal shelter. They set up a booth at a local farmer's market with the goal of driving awareness.

The marketing manager that works for the shelter had created beautiful information sheets. These sheets had QR codes that led to the website and Venmo accounts. There were sheets that outlined everything the shelter can take as donations. There were postcards with the online and physical address of the shelter. There were sheets about fostering and adoption. Every single question someone might have about the shelter's services was covered.

And yet.

And yet, it didn't matter. Despite all the information being available and easy to access, no one read it. Yes, they asked all the questions we assumed they would. The most-asked question was about what goods the shelter could take as a donation. Many people walked up to the table, put their hands on the sheet that outlined all the goods, and asked anyway.

So, what happened? I noticed something interesting about most of the interactions. It wasn't that someone would come up and ask, "what goods do you take as donations?". Instead, the conversation usually started with, "I have these things..." or "I adopted a dog from this shelter..." or some other variation. People wanted to start with their stories. They wanted to talk about themselves before getting to their questions.

This is the problem a lot of us face with our marketing. We look at it from our perspective. What we think our customers want. How we think our customers will interact. I was reminded that we can put our information on all the different digital channels, but some people still want to talk to you face-to-face. They want real human connection. Marketing is not about us. It's about them. It is about meeting your audience where they are, not where you want them to be.

Generative AI, social media, and other digital channels can act as barriers between

you and your audience. While you're working hard, creating content that's valuable and high-quality, you might be missing your audience altogether if you're not reaching them where they are. In my instance, all the print and digital information didn't matter. People wanted to talk and share their stories. But more than that. They want to connect and reach others. They want to feel emotions and sympathies. You can't do that easily with a website. Posting something on a social media page isn't the same if you don't get an instant reaction. It can all be very cold for the end user. Additionally, if we rely on machines, we tend to make assumptions about our audience. If they are in a certain age range, they must be using certain platforms. If they identify as a certain gender, they likely have these experiences. Those assumptions might be true some of the time, but what about the rest of the time?

Digital marketing, generative AI, all the gizmos and gadgets have their place and time. First, try to understand your audience. Do they just want information, or do they want to connect with you? Do they have a story to tell? Are you willing to listen? For your marketing to be effective, you need to spend time learning about your audience. Talk to people. Attend events and network. Make human connections. It's more important than ever.

I'm all for using generative AI to build out Ideal Customer Profiles, but those ICPs need to be based in reality. If the shelter had relied solely on putting out information sheets and brochures, they would have missed a lot of opportunities to make connections. Instead, they also put humans at the table who were willing to talk to people and answer questions. By doing this, they increased their odds of finding donors, fosters, and adopters.

Your audience is going to be unique to your business. The shelter example is unique to them. Talk to your customers and ask them how they get information. Run polls and surveys, and ask your audience where they want to make connections. This will inform the rest of your marketing in a smart, thoughtful way. You'll also be making deeper connections with your audience.

August 21, 2024: How to Balance Internal and External Audiences

When we think about our audience, we double down on the people outside our organization. We look at our buyers' journey, we analyze every step of the funnel, and we cater to our ICPs. But what about your internal audience? Your campaigns and efforts need to resonate with your stakeholders, your investors, and your teams. Unless you're creating in isolation, you're missing out on leveraging your internal audience.

Let's start with who makes up your audience:

- **External Audiences:** This group includes your customers, potential clients, and the public. Your marketing is focused on awareness, consideration, purchase, and loyalty. You're creating content about who you are and what problems you solve. This relationship can start as transactional. Ideally, it will grow into a long-term one. You're building trust over time.
- **Internal Audiences:** These are your employees, leadership, investors, and close partners. Your focus is on gathering feedback, meeting KPIs, and aligning with company goals. You're communicating with this group, not to them. This relationship, like with your external audience, is built on trust. Open, frequent, and direct communication is key.

It's easy to get caught up in chasing customers and growing sales. But if your internal team isn't informed or engaged, it can cause confusion, poor execution, and low morale. This impacts the customer experience and your overall success.

On the flip side, a motivated, well-informed internal team becomes your biggest asset. They understand your mission and bring that energy into their work. They are more collaborative and will directly influence your external success.

Turn your employees into ambassadors

Your internal audiences are your best brand ambassadors when they're engaged and informed. If they feel a sense of ownership and believe in your work, they'll be more likely to promote your efforts. How do you do that? Keep messaging clear and consistent.

Internal communication isn't just about sending out memos. It's about transparency

and consistency, especially when changes happen. Explain why decisions are being made, not just what those decisions are. If you're asking for feedback and ideas, acknowledge it and use it. Communicate out when you're incorporated. Give credit where credit is due. This builds trust and keeps everyone on the same page. And don't forget to celebrate wins. Celebrating team successes boosts morale. It reminds people that their contributions matter.

Where does this go wrong?

In my unscientific opinion, poor communication is 100% of the problem. One of the biggest mistakes companies make is deprioritizing what their internal audience needs. If employees feel left in the dark, it leads to disengagement and frustration. Similarly, saying one thing to the public and another to employees damages credibility. Mixed messaging can mean game over for both audiences.

To mitigate alienating people, build a culture of communication. This includes internal and external communication. This starts with leadership and works its way down and out. Consider regular check-ins, feedback loops, and face-to-face meetings. If you're relying solely on trading emails, you might be missing a lot of critical information.

So, how do you know if your internal communication efforts are working? Simple. Ask your employees. Talk to your internal audience to find out if they feel informed and if their needs are being met. Keeping your team engaged leads to better outcomes, both internally and externally.

Your internal and external audiences are equally important. When your team is aligned, motivated, and informed, they perform better. They deliver better customer experiences and execute more effectively. Striking a balance between your audiences is a must for successful marketing and your business as a whole.

August 28, 2024: The Productivity Paradox: How Procrastination Can Spark Creativity and Focus (and When It Becomes a Problem)

They say, "Write what you know." Today, I know how to procrastinate. Being somewhat resourceful, I turned to our Ideal Customer Profile for inspiration. Using a large language model, I asked our ICP what would be a good topic when procrastination is top of mind. I then asked how talking about procrastination could address their specific pain points.

As a quick refresher, I created our Ideal Customer Profile using generative AI. I used a combination of our data and our competitors' publicly available data. What I now have at my disposal is a proxy for our customer base that includes detailed pain points and how decisions are made.

Quick plug: Interested in your own ICP? [Give me a shout!](#)

Procrastination has a bad reputation. Especially in data-driven, efficiency-focused fields like marketing and analytics. What if I told you that procrastination could actually enhance your creativity and focus? Let's flip the script and explore how you can use procrastination as a productivity tool—without letting it become a problem. Whether you're a CMO juggling ROI demands or a data analyst deciphering complex data sets, there's something here for you.

Understanding Procrastination in Data-Driven Roles

The Pain Point: **Overwhelming Data Challenges**

I'll let you in on a terribly kept secret: procrastination often happens when you're overwhelmed. For those of us working in data-heavy roles, it's easy to feel buried under numbers, KPIs, and AI tools. But here's the silver lining: stepping back from that data tsunami might just be what you need.

Solution: Instead of beating yourself up for procrastinating, use it as an opportunity to recharge. Give your brain some space to breathe. When you're processing large datasets, stepping away—even briefly—can lead to breakthroughs. That's because your mind continues to work in the background, solving problems when you're not

consciously focused on them.

Example: Take a marketing director who's knee-deep in customer sentiment analysis. Instead of forcing the issue when they hit a roadblock, they step away for a walk or switch to a different task for an hour. When they return, they often find clarity where there was confusion. That break allowed their mind to process the data more creatively and efficiently.

Leveraging Procrastination for Creative Breakthroughs

The Pain Point: **Pressure to Prove ROI**

High-pressure roles often need creative solutions. This is especially true when proving the value of a marketing campaign or digital strategy. Procrastination can be an unexpected ally here.

Solution: Instead of seeing procrastination as a time-waster, think of it as giving your ideas room to incubate. Some of the best ideas surface when you're not actively thinking about the problem. This can be especially helpful when you're trying to come up with innovative marketing strategies that drive better ROI.

Tip: Try structured procrastination—like the Pomodoro Technique, which involves 25-minute work intervals followed by a short break. This allows you to indulge in procrastination in a controlled way while still making progress. Bonus: those breaks can be prime time for creative ideas to pop up.

Improving Workflow Efficiency by Taming Procrastination

The Pain Point: **Workflow Inefficiencies**

Let's talk workflow. When you're juggling complex digital transformation projects or marketing strategies, inefficiencies can creep in unnoticed. Procrastination can give you the breathing room to reassess and streamline your processes.

Solution: Use procrastination as a tool for reflection. When you find yourself hesitating to dive into a task, take that as a sign to step back and review your workflow. Are there bottlenecks? Is there a way to introduce automation to make your job easier? Sometimes procrastination is simply your mind's way of telling you

there's a better way to do things.

Example: Consider a team leader working on integrating a new CRM system. After a bout of procrastination, they realize the problem isn't the task itself but the workflow. By automating part of the data entry process, they eliminate inefficiencies and free up time for more strategic work. That moment of reflection saved hours of future frustration.

Staying Ahead of Trends Without Feeling Overwhelmed

The Pain Point: **Keeping Up with Trends**

For marketers today, keeping up with the latest trends—especially in AI and data analytics—can feel like drinking from a fire hose. It's no wonder procrastination happens when faced with the sheer volume of new information.

Solution: Short, intentional breaks can help you recharge and stay focused on the right trends, rather than trying to stay on top of everything at once. Use procrastination to filter out the noise and focus on what's most relevant to your goals.

Tip: Delegate trend research when possible, or set aside dedicated time blocks for it. This way, you're not overwhelming yourself by trying to learn everything at once. It's about being selective and strategic.

Using Procrastination to Clarify Goals and Align Teams

The Pain Point: **Lack of Clarity and Alignment**

Ever procrastinate because you're not sure where you're headed? It's a common sign that your goals—or your team's goals—might not be as clear as they should be.

Solution: When procrastination hits, take that as a signal to step back and reassess. Maybe it's time for a strategy session with your team to clarify your objectives. Sometimes, procrastination is your mind's way of telling you there's a lack of alignment, and it's better to fix that now before diving back into work.

Example: A CMO notices they've been putting off a major campaign launch. After sitting down with their team for a realignment meeting, they realize the hesitation

came from unclear goals. After clarifying objectives, the team moves forward with more confidence—and more success.

Turning Procrastination Into a Productive Tool

Procrastination doesn't have to be the enemy of productivity. In fact, when you learn to harness it, it can be a powerful tool for creativity, problem-solving, and strategic thinking.

Here's what I recommend: The next time you catch yourself procrastinating, **don't panic**. Instead, ask yourself what it's trying to tell you. Is it a sign that you need a break? Or maybe that you need more clarity or better alignment with your goals? Embrace those moments as opportunities for growth.

If procrastination is a challenge for you, take a few moments to reflect on how you can turn it into a productivity booster. If you're struggling to integrate this into your workflow, reach out. I'd love to help you find practical ways to make procrastination work for you—rather than against you.

September 04, 2024: Three Must Haves for a Business Continuity Plan (BCP)

Let me paint a picture for you: it's Monday morning, and your CRM just crashed. No customer data, no leads, no marketing campaigns. For most businesses, this would trigger sheer panic—and it's exactly what happens to companies without a solid business continuity plan (BCP).

These days, business leaders face growing pressure to keep things running smoothly. While disruptions like cyberattacks, system outages, or natural disasters might seem rare, they're more common than you think. You already have enough on your plate. But here's the truth: without a BCP, your business is a ticking time bomb.

When I worked in a regulated industry, we not only had BCPs but we also updated them at least quarterly. Our business was built on our data and data collection. If those systems failed, we'd have a lot of angry customers, including the FDA. You don't want to be on their bad side.

First things first, what is a Business Continuity Plan? In short, it's a document that outlines all your critical systems that need to continue operating during a critical event such as an outage. Before you get into the weeds of redundancy planning, you need to audit your systems. Not every system you use is going to make the cut.

How do you evaluate which systems are critical?

Start with your customers. Put yourself in their shoes. What services do they rely on? Work backwards and list the systems you use to provide those services. For instance, as nice as it is to have our email newsletter data, it doesn't currently play a role in our services. If the system goes down, it's not going to make the cut of platforms we need to restore immediately. Focusing on your customers' needs (and not your own) will give you your shortlist of systems that need to be in your BCP.

As stated above, you have a full plate. Writing a BCP is not high on your to-do list. It falls into the same category of process development. You know it's important but not important enough to actually do. If you don't have time to draft a full BCP, here are the three must-haves for your business continuity plan.

1. **Data Backup Strategy** - You need to ensure business data is backed up.

Review your shortlist of systems. Is there a clear process for how to access the data both online and offline? Are there automatic backups? Focus on your shortlist of critical systems. This will make completing this task more reasonable.

2. **Roles & Responsibilities** – Make sure every team member knows their specific role in case of an emergency. Who has access to your critical data? What is the plan if that person (or team) is unavailable? How do you make sure all the roles are clear? I know that process documentation is a pain, but this is one process you have to have documented. Clear processes help avoid confusion about roles.
3. **Communication Protocols** – Who communicates with whom, how, and when? I would argue that this step is equally as important as your data backup strategy. If your team doesn't know what to do and when, your BCP is just a document and not an effective tool.

I'll be honest. The first draft of this post was very long-winded, very technical, and very detailed. You can do a deep dive with your business continuity planning. You can dig into each component of each system you use. You can spend weeks, even months, creating a bulletproof BCP. But in reality, you just need things to work. If you review those three steps, you'll be in better shape than most. Start with your shortlist of critical systems that your customers rely on. Then document those three pieces, and you'll be ready if disaster strikes.

September 11, 2024: Pro Tips for Attending and Speaking at an Event

This week Trust Insights is on the road! Not just Chris, I'm also hitting the road. We're speaking at [MAICON](#) in Cleveland.

I usually try to write topics that are not only top of mind, but that you would get value from. So, this week I want to give you some of my pro tips for having a smooth event and speaking experience.

Have a good story

This should go without saying, but not all speakers are good storytellers. One of the things I've struggled with is the storytelling aspect of speaking. I can deliver the facts and teach you about pieces, but it's not engaging. People want to relate to it. They want to relate to the person they are listening to. I've worked hard to make sure I'm including personal experience stories in my talks. When you're building out your talk, think about your experience. This is the reason why you're speaking about the topic in the first place. Tell your audience what happened. Tell them what that experience looked like for you and how you learned from it.

Make friends with the event team

These people are the best. They are the most knowledgeable. I cannot say enough good things about the staff at MAICON (and other events)! The event team has a lot of responsibility leading up to the events, during the event, and after the event. This means that as a speaker, you can either be in their graces, and they will bend over backwards for you. They are hardworking humans who want the best for you and the event. When they say, "don't hesitate to reach out with questions!" they mean it. I've gotten travel safety tips and insider info from these teams. They were happy to help because there is mutual respect. They can absolutely make your experience the best ever.

Honor and meet your deadlines

Or, you can be on their s**t list. One surefire way to make that list is to not meet your deadlines. Don't be that speaker that they have to chase for materials. Don't be that

speaker that doesn't respond to emails and requests from the event team. You are not the only speaker they are trying to coordinate with. That said, things happen; deadlines come and go. Be upfront about your bandwidth. More often than not, the team is understanding and will give you an extension. For this event, I was close to finishing my slide deck, but I needed to sleep on it. I reached out to the amazing Ashlee and she gave me another 48 hours. It was exactly what I needed, and she knew what to expect from me. Everyone wins. I also made sure to let her know when I did submit the final presentation so she wouldn't be waiting around for it. She has her own set of deadlines and expectations to meet.

Practice, practice, and then practice some more

People come to events to learn. They also come to events to see engaging speakers. I know I am at my best when everyone around me is annoyed by how much they've heard my talk already. Personally, I like to practice my talk to the point where I could do it without slides. Technical issues happen, slides skip, and things break. The audience can be understanding, but they are still there to learn from you. The internet is full of videos of musicians, artists, and speakers performing through issues. They continue to thrive when things break. Why? Because they have rehearsed to the point of the show being muscle memory. This kind of preparation also helps with the nerves you might feel.

Tips for the anxious speaker

Speaking of nerves, I have anxiety. You might have already known this about me. Getting on stage doesn't make me anxious because of all the preparation I do. What does make me anxious is the travel itself. There are a lot of things out of my control when I travel. My strategy is to take stock of all my steps. Do I have all my flight info? What time do I need to arrive? How will I get to and from the airport? What is on my packing list? For me, lists are soothing. I can see what I need to do and what is in my control. This works for me. The other thing that works for me is having someone I can tell my whereabouts to. It gives me a sense of calm when I feel a little bit safer.

Enjoy the event and stay present

Events can be overwhelming, even for those who do them a lot. For me, it can be a lot, and I start to shut down. I can't tell you how to manage that feeling. What I can tell you is that it's okay to take breaks. Find a quiet corner. Go back to your hotel room. Take a walk outside and get some air. I try to keep the people around me

aware of how I'm doing, so if I need a break, they know what's going on. That said, the event staff works really hard to make it the best experience for everyone involved. If you need something, don't be afraid to ask for it. When you are at the show, try to stay off your devices and be in the moment. You'll learn a lot, meet some great people, and create great memories!

Events are a great way to connect with your peers and learn from the pros. The teams that put the events together are there to help you. Whether you're attending or speaking, it can be nerve-wracking to get ready. You can't control everything, but with some preparation ahead of time, you can have a great experience.

September 18, 2024: How to Overcome Resistance to AI Integration in Your Organization

At MAICON last week, I talked about managing the people who manage AI. [In this talk](#), I mentioned that AI integration is not a digital transformation. It's a culture shift. A culture shift means that your team, your people, need to change. That's not an easy ask.

Adopting new technologies, especially AI, can be a tough sell within an organization. People tend to resist change—whether it's fear of job loss, discomfort with new tools, or concerns about losing the human touch. But the good news is that, with the right strategies, you can turn that resistance into enthusiasm for innovation.

Understand the Root Cause of Resistance

Resistance to change, especially AI, often stems from a few fears: job loss, a lack of understanding, and anxiety over its impact on creativity and decision-making. If you're hearing hesitation in your organization, take the time to listen and understand the specific fears. **This is key.** You have to really hear what people are saying. I've often found that even if they know it won't change things, people still want to be heard. They want to know that their voice matters. If you don't take the time to hear your people out, you will not be able to effect change. AI is a culture shift. You're asking people to do something new and different. There is bound to be resistance.

Communicate the Benefits in Their Language

It's easy to talk about AI in terms of its efficiency, but not everyone will see that as a positive. Tailor the messaging to the specific needs of each department. For marketing, highlight how AI can provide deeper customer insights, making campaigns more targeted. For operations, emphasize increased efficiency and reduced human error. It's not about replacing people, but rather how to make their work product better and give them time to do more high value tasks. Keep the conversation about the people, not the technology.

Provide Education and Training

One of the most significant reasons for pushback is a lack of understanding. If your team doesn't know what AI does or how it works, they're less likely to feel comfortable using it. Run training sessions, webinars, or quick tutorials on AI. This will help your team get comfortable with new tools. You can also ask neutral third parties ([like me!](#)) to help with education.

You can also invest in courses, like [Generative AI for Marketers](#)

Start Small, Show Quick Wins

You don't need to overhaul your entire business overnight. Start with small, low-risk projects where AI can clearly demonstrate its value. Maybe it's automating a repetitive task that everyone dreads or enhancing a process that's already working well. Once you have some quick wins under your belt, you'll find it easier to build trust and reduce skepticism. Small victories that the teams can feel good about will go a long way.

Involve Key Players in the Process

If you want widespread buy-in, you'll need the support of your internal champions. Identify key influencers—department heads and respected team members—and get them on board early. When your culture carriers support change, you'll have an easier time getting others on board. People look to their peers and leaders for cues. Getting your "influencers" excited about AI can help you shift the broader mindset.

Emphasize AI as a Collaborative Tool

One of the biggest misconceptions about AI is that it's here to take over. In reality, AI is a partner that helps with tasks like data analysis, automation, and analysis. By reframing AI as a collaborative tool that complements creativity and decision-making, you can reduce fear and build enthusiasm. It's like having a really capable assistant at all times. AI isn't here to replace anyone. It's here to help them do their jobs better.

Overcoming resistance to AI integration is about more than pushing a new tool. It's about understanding and addressing your team's concerns, educating them, and demonstrating value. By starting small, involving key players, and communicating benefits in a way that resonates, you can mitigate concerns and anxieties.

Change is a marathon, not a sprint. With patience and persistence, you can lead your organization through a successful culture shift and integrate AI into your daily workflow.

September 25, 2024: Surviving End-of-Year Planning

It's almost October. That means it's almost Q4 and the end-of-year scramble. You're likely feeling the pressure. You have to balance this year's data, prove ROI, set goals, and coordinate across departments. Oh! And don't forget about AI. You have to add it to everything! Best practices be damned. Let's review some of the basics of end-of-year planning to give back a sense of control.

Here's how to not just survive it, but perhaps even thrive in it:

Review What Worked (and What Didn't)

Start with reflection. Dive into the data to understand what delivered results and where things fell short. This includes where you integrated AI. Focus on **measurable outcomes**—which campaigns drove revenue, boosted engagement, or generated leads? This is your chance to celebrate wins and identify areas for improvement.

If you followed even the smallest iota of my advice this year, you would have used the [5P Framework](#) for your efforts. If you didn't (and that's cool, I guess), you can use it to audit your efforts. And then use it to plan your 2025 marketing.

As a refresher, the 5Ps are Purpose, People, Process, Platform, and Performance. You can do a quick audit by answering some basic questions:

Purpose: What was the problem we were trying to solve? **People:** Which teams were involved, and which segments of our audience was this for? **Process:** How did we approach this effort? Was it done repeatedly in a consistent way? **Platform:** What tools did we use to execute this effort? What platforms did we use to collect data? **Performance:** Did we collect the data to tell us that we solved the problem?

It's easy to drown in numbers. Stick to the data that ties back to business impact—this is your opportunity to prove ROI and refine your approach for next year.

Streamline Workflows for Efficiency

Inefficiency is the silent killer of productivity. If your team struggles with bottlenecks—whether it's slow reporting, content creation delays, or decision-

making—now is the time to fix it. Look for places to automate repetitive tasks or simplify processes. Your team’s time is too valuable to waste on manual tasks. You can use the [Trust Insights TRIPS Framework](#) to help prioritize these tasks. Make one of your end-of-year goals solid process documentation.

Balance Innovation with the Essentials

Innovation is crucial, but you don’t want to throw your core operations out the window. For 2025, think about how you’ll balance trying new things while still supporting the activities that drive the bulk of your results.

Be strategic about where you allocate time, budget, and resources. Not every experiment will work, but the ones that do could give you an edge. Go back to your data from the 5Ps and TRIPS to determine your priorities.

Stay Agile: Plan for Flexibility

Your 2025 plan needs to account for changes in the market, technology, and customer behavior. The days of rigid, year-long plans are long gone. Consider a **scenario-based approach** to planning that allows for flexibility. This is a great opportunity to create user stories.

User stories are simple three-part sentences. **As a [persona], I [want to], so [that].** Create user stories for different scenarios that might happen. Write them from the perspective of your [Ideal Customer Profile](#). If you don’t have your ICP, start there (or ask me to help). Then you can create your user stories to plan for different business goals and customer behaviors.

Set regular check-ins to adjust the course if needed. This way, no matter what 2024 throws at you, you’re ready to pivot.

Collaborate to Build a Strong Plan

Planning doesn’t happen in isolation. Make sure to engage your teams early and often. Cross-departmental alignment is critical. Marketing, IT, operations, and other key players must work toward the same goals. Use the 5Ps and the user stories you created to help you communicate what you’re thinking.

Collaboration also helps you spot blind spots and gain **buy-in** from the people who

will be executing the plan. The more input you get, the more likely you are to create a plan that sticks.

Create a Roadmap for Continuous Success

Planning doesn't stop when the calendar flips. Build a roadmap that includes **ongoing monitoring, quarterly reviews**, and the flexibility to adjust. This keeps you proactive rather than reactive, making sure you catch issues early before they snowball.

Keep leadership informed with regular updates, focusing on early wins and KPIs that show progress.

Looking Ahead

End-of-year planning can be daunting, but it's also your opportunity to set yourself up for success. By focusing on what worked, streamlining workflows, aligning goals, and staying agile, you'll be ready for a strong 2025.

Need help with data and technology to make smarter decisions? [Give me a shout.](#)

October 02, 2024: What Happens When You Get Lost in Generative AI?

I hate everything I'm writing today. I know I'm not alone. You probably hate it too. Ha!

But in all seriousness, I (and likely you) read Ann Handley's newsletter over the weekend, where she begged and pleaded with us not to use AI to write the first draft.

I will admit, I am guilty of doing just this. And as a result, I am seeing the results that Ann warned us all about.

"The first draft is the thinking draft. That's where you need to be fully present. On board. Just you and your glorious ideas.

Otherwise, you undermine yourself. You shortchange your growth and creativity. You put the ROBOTS first. You put yourself second."

I have been putting myself second. I thought it was okay, that it was still me, still human. I was using tools that I had built to represent me, so what was the hard?

Well, here I am - perhaps one or two months later, and I feel like I've lost the ability to write the first draft on my own. I have shortchanged my growth and creativity.

Insert deep sigh here.

Ann will tell you that I do that a lot. Sigh deeply. My brain is constantly spinning and working through scenarios. When it comes to a solution or realization, I sigh. Apparently, I come to solutions in my brain often enough that my deep sighs are noticeable.

Let me clarify; while I've been using tools like KatieGPT, which is 100% trained on my writing and tone, I am the one editing. My edits usually alter the content so much that it's no longer what AI generated. But I still let AI do the deep thinking for me.

Here I am, writing about how I've shortchanged myself because I became reliant on

AI. So, what went wrong today?

I had an idea to summarize a couple of articles that had come out recently about women in the workplace and their use of AI. Gemini did a good enough job of summarizing the article into some main points. I then gave those points to KatieGPT and asked her to write a reaction post. She did. It was subpar. I gave that post to our Ideal Customer Profile that scores content. It scored about a 70 and gave some feedback. I took that feedback and gave it to KatieGPT to rewrite. She did; I re-scored the content and it was now a 90/100. This meant that it resonated with our ICP.

I hated it. I hated every single word of it. I tried to rewrite it, and I hated it even more. It had become so overthought, so convoluted that the real Katie got lost.

This is what happens with generative AI. Or rather, this is what can happen if you let it. Generative AI can do a lot of things. Great things. Amazing things. But it shouldn't replace you, the human. It shouldn't replace your ideas, your creativity, your ugly drafts.

This is why having a thoughtful AI integration plan is so critical. When I [spoke about this at MAICON](#) a few weeks ago, I emphasized that you need to put people first.

I didn't follow my own advice. It happens. And I'm willing to admit it.

We get so caught up in the day-to-day that we forget to do things the "right" way instead of the "easy" way. In my case, it wasn't even the easy way. It was lazy, and I can admit that. I always want this part of the newsletter to resonate. I want it to be authentic. And in my mind, I still had that, even if I was using a synthetic version of me.

Well, lesson learned. I commit to you (and myself) not to let generative AI create my first draft. It's not doing me or you any good. I'm shortchanging myself, and ultimately you, the reader. If I don't love what I'm writing, why should you?

Ok, enough groveling. You get it. I get it. To be clear, none of this was written using generative AI.

Until next week! In the meantime, I'll be over here writing super hideous first drafts!

October 09, 2024: Where Does AI Fit Into Annual Planning?

Stop leading with generative AI. Just stop it.

I feel like [Susan Powter screaming, "Stop the insanity,"](#) minus the shaved head.

Why do I want you to stop? Because everywhere I turn, we're talking about AI.

Don't get me wrong, I am all in with AI. I see the potential. I use it myself. However, it cannot do everything. This is the insanity that I want you to stop.

Just about every day when Chris and I talk to clients and peers, there is a comment about AI. Many times it's about using AI to solve a problem. When we dig deeper, we often find that it's not a problem for AI to solve. It's a human problem, a process problem, or a combination of the two.

So, why can't you use AI for these problems? You can, but let me step back and give you the full picture.

To get organized, we like to use the [Trust Insights TRIPS Framework](#). This simple framework allows people to organize and score their tasks. When you go through this exercise, you can prioritize which tasks are appropriate to give to generative AI. The next step, once you have your prioritized list of tasks, is to examine the process. Ideally, there should be solid documentation for the process. You should also be able to execute in a consistent manner.

This is where things usually come to a screeching halt. I've talked a lot about process development and why it's important. This is not a new message from me. The challenge that we're seeing is that the more we dig into these processes, the less they exist.

We get so wrapped up in our day-to-day, keeping our heads above water, trying to survive. We have a lot on our plates. Too much to do, too few hours and resources in which to get it done. We just do it. We don't think about whether there is a better way to do it. So when we're asked about the process, the response is cobbled-together pieces.

I'm not knocking survival. It's important right now. Things need to get done.

What I am saying is that a lack of process is the likely culprit for the lack of efficiency. Layering AI on top isn't the solution. That said, you can use AI to assist you when you are documenting your process. It can feel confusing and overwhelming, but it doesn't need to be.

Think about generative AI this way. Instead of a solution you just hand everything to, think of it as a great assistant, ready to help. You have to give direction, data, and goals to an assistant. You can do the same with generative AI. But you have to play an active role. You need to stay engaged.

I bring this up today because as you're in your annual planning, you're likely thinking about where AI fits in. That's fantastic, and exactly what you should be thinking about! That said, make sure you have a good handle on the problems you're solving and the processes needed. A good starting place is the [Trust Insights 5P Framework](#). You can use the 5Ps as a checklist for each initiative.

Stop the insanity of leading with AI as a solution for everything. Take this time as you're revamping your marketing plans to ensure you have a solid foundation. From there you can experiment and pilot generative AI.

October 16, 2024: Do I Need to Be an AI Expert?

The past few weeks, I've been talking about how to approach weaving AI into your end-of-year planning. And maybe you're thinking, "But I still don't know that much about AI!"

That's ok!

One of the big misconceptions about new tech is that you need to immediately be an expert in it.

What you really need to be an expert in is critical thinking. Fads, trends, and tech will come and go. But being able to assess the situation in a grounded way will never go out of style.

Critical thinking includes:

- Questioning - ask questions. Lots of them. Turn over every rock and see what is underneath it. This might be the most important part of critical thinking. When you're evaluating AI for your marketing plans, you need to ask a lot of questions. Questions like, "What happens if this doesn't work?" or, "How will this look in our day-to-day?" or, "Will this impact our customers at all?"
- Acknowledging assumptions - coupled with questioning, you're going to have assumptions about new things. Maybe it's that your role will be replaced by AI if you introduce it into your planning. Acknowledge that assumption and explore them. Go back to your questions; do you have more that have come up? Keep asking!
- Making informed decisions - this is easier said than done. Even with all the fact-finding missions we go on and data we gather, we still lead with our emotions. The more information we collect and actually use, the more data-driven our decisions are. Again, go back to your current questions and assumptions. Make a list of what you know and what is still unknown. Do you have enough information to make a decision? Are you clear on what it is that you need?
- A healthy amount of skepticism - when exploring something new, keep your eyes and ears open. You don't have to approach it like it won't work. However, you should explore all the options and backup plans if it doesn't. If you see something new, like generative AI, and don't ask "what if" questions, you know

you might be in trouble.

Additionally, you'll want to make sure you have good process documentation. This is your foundation for anything you do in business. By making sure you and your team can complete things in a repeatable way, new tech becomes irrelevant. Your processes allow your people to be confident in what they are doing. If your people are confident, introducing new tech doesn't become an issue. You can pick where it goes with little interruption.

Lastly, you want to make sure you're open to change. Many teams are stuck in the "This is how we've always done it" mentality. It's the "if it's not broke, don't fix it" mantra that stunts your growth. I get it, change is scary. And where there are dollars attached, it's downright frightening. But go back to your processes. Find low-risk places to experiment. It doesn't have to be all or nothing. Allow your people to be involved in the discussions and decisions.

You don't have to be an expert in AI to evaluate it. You do have to be capable of critical thinking. That's it. That's the secret. Keep your wits about you, ask questions, and stay open to possibilities.

October 23, 2024: Are We Digging Deep Enough Into Our Problems?

Are we digging deep enough into our problems?

The answer is no.

But wait. What about the 5Ps? I'm using that framework! And I say, that's amazing! You totally should be using the 5Ps to get yourself organized. However, I will be the first person to admit that the 5P Framework doesn't go deep enough.

What does that mean, going deep enough?

It means that we need to get to the root of the problem before we can create solutions to solve it. A few months ago, I used the analogy of digging out poison ivy from my garden. The gist of the story is that on day one, I pulled the surface-level leaves. On day two, I dug out the roots. The roots were about 10 feet long, a bigger problem than I realized. Once I got to the root, the problem went away. I didn't see the leaves again once I dug deeper.

We don't do this enough in our businesses. We are solution-oriented, but we don't take enough time to really understand the problems we're solving. We want quick fixes, low-hanging fruit, and easy wins. In a lot of instances, that's fine and works well. But when you run up against an issue that happens again and again, despite the solution, you need to dig deeper.

My friend, [Brooke Sellas](#) likes to say, "Do the deep work." This is what she means. You need to dig deep. Deeper than you probably think you need to.

I'm currently working with a client that is doing the deep work. I will acknowledge that it is not a quick fix. That's the rub. It's not quick. I hear all the time, "we want to move faster!" We can only move as fast as the deep work allows.

The reason it takes time is that we have to put aside ego, find self-awareness, and admit failures. It's hard. There are no two ways about it. People get defensive. People feel like they are being judged. Being vulnerable, especially in a business

setting, can feel like an impossible ask. I get it. I'm not going to pretend it is.

So, how do you get into the deep work in a safe and professional way? When I worked in-house, one of my team members had a master's degree in conflict resolution. I would bring them into different meetings to help facilitate conversations. The first step is to outline the rules. The rules were often around expectations of how people treated each other and how we spoke to each other. Blaming wasn't allowed. Topics had to be stuck to. People weren't allowed to talk over or interrupt each other. It was a lot like a group therapy session. It was hard. Some sessions went really poorly; others were more productive. There were times when the tension got really thick and people were outwardly, obviously stressed.

This is a very human thing. Sure, you could use AI to record answers, maybe even get anonymous feedback; but digging deep is not a problem caused or solved by technology. Just about every issue within an organization starts with a communication breakdown. A lack of process is a communication breakdown. What did we want to do? What expectations do we need to set? A poor technology fit is a communication breakdown. What were the goals? Did we have a clear understanding of the requirements? A failed campaign is a communication breakdown. What were the measures of success? Did we pay attention to the analytics along the way and make adjustments? Did we know we were supposed to?

To understand what happened, you need to build trust. You need to create a space free from judgment. This is not something you can drop AI into and let the tech handle it.

This is why we don't dig deep. It's hard. It takes time. It's not something you can "AI" your way out of. If you want to grow, evolve, and get ahead in your business, you have to do the deep work. You have to untangle your processes. You have to open your communication channels. You need less tech, not more.

To that, I would highly recommend a neutral party to facilitate these conversations and efforts. Why? Because you're emotionally invested. That's a good thing. But you can't be objective and in the weeds at the same time. Let someone else take the reins and guide the process. If you want to talk to me about doing this for you, [just reach out.](#)

Before you get swept up in annual planning, AI roadmaps, and everything else you want to do in 2025, do a gut check. Do you know what's going on with the people in

your organization? Do you know the root causes of inefficiencies and lack of collaboration? Dig deep. Do the hard things. Sort out your organizational challenges before you layer half-hearted solutions on top of existing issues. You'll be setting you and your teams up for even more success in the coming years.

October 30, 2024: How Can We Undo a Toxic Culture?

We've all been there. We've shown up to jobs that are just a paycheck. They don't care about us, and we don't care about them. We do our thing and then get out as fast as possible. Sometimes, there is an added layer of toxicity that is created by our coworkers. People are afraid to fail. Team members get reamed out for not delivering on expectations. There are more tears than cheers.

It's shocking to believe that this is still a part of corporate culture in 2024, but here we are. Let's say you've managed to get rid of the problematic team members, the ones creating the toxic culture. How do you rebuild trust and turn it around?

Pause

Take a breath. Literally. Give people a moment to breathe. I used to have a manager who would openly yell at me in meetings in front of the rest of the team. It didn't matter if what he was angry about had anything to do with me. To him, that was irrelevant; I was the best person to take the blame. Once the company decided to let him go, I needed some time. I was no longer going to get my butt handed to me in meetings for no reason. It took a few weeks to feel like I could actually relax and speak up again. If the rest of the management team had moved too fast to make changes or replace his role, I never would have recovered from that experience. Give your people time to readjust.

Listen

You may have team members who aren't used to speaking up. The toxic environment may have made them feel like it wasn't safe to do so. When you're rebuilding, make time to listen to those who lost their voice. But really listen. And let them do it in their own time, in their own way. Give options to set up team meetings or one-on-ones. Don't force the conversation. There is a lot of healing that happens when someone has the chance to sit in silence without expectation.

Acknowledge

The people who lived through the toxic situations need to know that they didn't imagine it. Develop communication that acknowledges the situation did, in fact,

happen, and that we want to learn and grow from it. Personally, I would stay away from phrases like “move on” because it indicates that we want to pretend it didn’t happen. Your team wants to know that you have their backs and will work with them to create a more open and positive culture. Not that you’re just going to ignore past mistakes.

Patience

Rebuilding your culture, which is rebuilding trust, takes time. Not everyone will suddenly show up with a smile. Allow people to process the situation at their pace. Some team members may decide that it’s no longer a good fit, despite removing the toxic people. It’s hard, but it happens. Those who stay, those who want to work with you to create a better culture, will become your champions.

As you move into 2025, I would encourage you to take a break from your planning to take stock of how people are feeling around you. Are your teams happy? Are they afraid to speak up? Do they feel motivated and excited? Auditing your culture is as important as auditing your marketing. A toxic culture doesn’t happen overnight. It’s gradual and, at times, hard to notice. Those who tend to create a toxic culture can be good at hiding that they are the cause. Make your people part of your planning. Add in tactics that allow you to check in often. As the saying goes, you’ll catch more flies with honey. If you’re only putting out vinegar, you’re going to have a difficult time getting things done.

November 06, 2024: Take Care of Yourself This Week

This week in the United States is a hard one. We've been building toward this presidential election for months. As I write this, the election is not yet over. As you read this, the results will be in. We need to figure out what to do with ourselves in the meantime.

I struggle with high-functioning anxiety. "Struggle" is the wrong word. I have a solid handle on it and can recognize when I need a moment to breathe. I am tuned into the signals that my body gives me, letting me know that my anxiety is rising. When those moments happen—and they happen daily—I focus on what I can control.

Make a To-Do List

This doesn't have to be a list just for work. Write down things that you know you can do. This might be taking a shower, emptying the dishwasher, or putting on pants. If those things feel too hard right now, that's okay. Start with what you can do. Take five deep breaths. Great! You've crossed something important off your list. Try it again. Wow! You're doing amazing! As much as we would like the world to stop spinning, it keeps on going. If you're leading a team, managing clients, or just trying to get through the day, focus on what you can control. There are a lot of unknowns that will bog us down. To keep things moving forward, make a list and keep your eyes on that. This will help you and your teams keep the trains on the tracks and block out the other distractions.

Reach Out

When you're in a moment of stress or anxiety, you can believe that reaching out to someone is a burden on them. We tend to keep things to ourselves, but isolating, especially now, can do more harm than good. During the pandemic, many people developed higher anxiety because of the isolation. Check in with your team members and give them the space they need to process things. We all have feelings about what's happening, and we will all deal with them differently. If you see team members struggling, reach out to them. Let them know they can take some time off. Yes, there are things that need to get done, but your team's mental health is more important. Prioritizing your people will serve you better in the long run.

Let's keep it short this week because there are plenty of things pulling your focus. Regardless of the outcome of the election this week, the aftershock will last for a

while. Businesses will be unsure how to move forward. How we make decisions will have even more dependencies. The stress that we're feeling this week will likely extend for the next few months.

In business and in your life, please take care of yourself. Recognize when it's too much. When it is, take a step back and give yourself a break. It's the terrible analogy of the oxygen mask on a plane. You have to put yours on first before you can help others.

November 13, 2024: Validate Marketing Ideas With User Stories

Disclosure: Katie is traveling for MarketingProfs B2B Forum this week, and so we took the transcript from our workshop, extracted a relevant portion, and with Anthropic Claude Sonnet 3.5, had it generate this week's newsletter from Katie's actual words at the workshop.

You know that feeling when you wake up with what feels like the MOST AMAZING marketing idea ever? The one that has you reaching for your phone at 3 AM to send a Slack message to your team because you just can't wait to share it?

Yep, I've been there too. More times than I care to admit.

But here's the thing - as a recovering project manager who has managed agile development teams for years, I've learned that enthusiasm doesn't always equal effectiveness.

Let me share a little behind-the-scenes story about how Chris and I handle these "brilliant" ideas at Trust Insights. It's actually kind of embarrassing how often this plays out:

Me: "Hey Chris, I have this amazing idea we should totally do!" Chris: "Okay, put it into a user story." Me: *Pause* "...Never mind, it was a terrible idea."

Sound familiar?

The thing is, I'm not actually giving up on ideas - I'm saving us time, resources, and potential frustration by using a simple framework borrowed from software development: the user story.

What's a User Story Anyway?

A user story is a three-part sentence that forces you to think through: 1. Who needs this thing (the role) 2. What they need to do (the task) 3. Why they need it (the outcome)

The format is simple:

“As a [role], I need to [task] so that [outcome]”

Why It Works for Marketing

Here’s what makes user stories so powerful for validating marketing ideas:

1. They force you to identify your actual audience (not just “everyone”)
2. They make you articulate what you’re really trying to achieve
3. Most importantly - they require you to specify the concrete outcome

That last part - the “so that” - is where most marketing ideas fall apart. And that’s a good thing! Better to realize it now than after you’ve invested time and resources.

It Works For Everything

The beauty of this approach is that it works for any idea. Sometimes Chris will come to me excited about a new technical innovation he’s created (like an automated playlist curator). So I’ll ask him to put it into a user story format:

“As a [target audience], I need an automated music curator so that...”

And that’s where we get stuck. Because while the technology might be cool, if we can’t articulate why our audience needs it or what problem it solves, it’s probably not worth pursuing right now.

How to Use This Today

1. Take your current marketing idea or campaign
2. Try to write it as a user story
3. If you can’t complete all three parts clearly, that’s a red flag
4. If you can complete it, use the outcome to define your success metrics

The next time you have what feels like a brilliant marketing idea, try this approach. You might find that some ideas don’t make it past the user story stage - and that’s okay! It’s much better to figure that out before you’ve invested resources.

And if you’re like me, you might find yourself having this conversation in your own head before you even bring ideas to your team. (Which, honestly, has probably saved my team from having to sit through some pretty questionable brainstorming sessions.)

Remember: No matter how exciting an idea seems at first, if you can’t articulate

who needs it and why, it might be time to go back to the drawing board. Or in my case, back to sleep at 3 AM instead of sending that Slack message.

November 20, 2024: Keeping the Human Element: Boundaries in an AI World

Recently at #MPB2B, amidst discussions of emerging technologies and innovations, a profound theme emerged that transcended the technical specifications and implementation strategies. The conference revealed an essential truth about our evolving digital landscape: maintaining human connection remains paramount as we navigate the possibilities of generative AI and marketing technology.

[I put up a post about my experience here.](#)

This emphasis on human-centric approaches resonated deeply with my professional philosophy and experience. As we explore increasingly sophisticated technological capabilities, the question isn't just about what technology can do, but about how we preserve authentic human engagement within these advances.

Why Boundaries Matter

I'm that person who leaves parties early to go to bed. Zero guilt about it. I'm also not big on hugging – it's just not my thing. These might seem like small, personal quirks, but they're actually boundaries I've set that help me function better in social situations. These boundaries keep me sane and safe. They work for me and me alone. You would need to decide what your boundaries are.

The same principle applies to how we handle technology in business. There is no shortage of tech to choose from, and a million different ways it can help you. It's easy to get lost in the weeds of letting tech take over.

Why is this important? You're going to get pulled in a lot of directions. Heck, you already are! Being able to set boundaries allows you to better set expectations and say no when you need to. As you move into 2025, consider establishing boundaries with your team.

Setting Tech Boundaries

1. **The "Shiny Object" Boundary**

- Not every new tool needs to be implemented
- Just because we *can* automate something doesn't mean we *should*
- Sometimes the old way is the right way

2. The “Human Touch” Boundary

- Deciding which tasks stay human-driven
- Identifying where personal expertise adds irreplaceable value
- Maintaining authentic connections with clients and team members

3. The “Automation Line” Boundary

- Defining clear limits on what we automate
- Protecting creative processes that need human insight
- Keeping strategic decisions in human hands

In my own work, I’ve had to set some pretty clear boundaries with technology. Given where Trust Insights is with generative AI, I could easily get swept up in what’s possible. For instance, while AI could probably write some of our content, I choose to keep our core messaging human-generated. Why? Because our expertise and personality are what make our content unique. (And no, the irony of writing about AI boundaries isn’t lost on me.)

So, where do you start? I’ve given some examples of what boundaries you can set, but you need to set ones that make sense for you. Start by asking yourself and your team some questions.

1. Audit Your Current Tech Use

- Where are you perhaps over-relying on automation?
- Which processes actually benefit from human touch?
- What’s the real cost of removing the human element?

2. Define Your Non-Negotiables

- Which tasks must stay human-driven?
- What values can’t be compromised?
- Where do you need to maintain direct human connections?

3. Create Clear Guidelines

- Document your boundaries
- Share them with your team
- Review and adjust as needed

Easier said than done, this may take a few tries to get right. Once you’ve established your boundaries, communication is key. It’s easy to get frustrated when people overstep, but clear communication is crucial. Did we clearly define our limits? Did we effectively communicate those boundaries? Consistent communication is essential, even if it means repeating yourself. After all, we can’t expect others to respect boundaries they don’t know exist.

As technology continues to evolve, our boundaries will become our compass. They’ll help us navigate the delicate balance between leveraging powerful tools and

maintaining our human essence.

Remember: It's okay to embrace technology. It's also okay to say, "This far, no further." Your boundaries are valid. They are yours. You decide where the line is.

The future of marketing isn't about choosing between human and machine – it's about setting smart boundaries that let both thrive. And honestly? That's exactly the kind of future I want to help build.

November 27, 2024: Happy Thanksgiving from Trust Insights!

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Happy Thanksgiving from Trust Insights!

This week I put down the data and picked up the bread basket. I asked our Analytics for Marketers community about their favorite Thanksgiving side dishes. (Because let's be honest, the sides are always the best part!)

You know what's amazing about our community? Not only do they know their data, but they have some seriously good taste in food. And since I'm a big believer in sharing insights (even the tasty ones), I thought I'd break down what I learned.

First up - and this made me ridiculously happy - carbs dominated the conversation. I shared that carbs are my love language (I'm talking dinner rolls and cornbread stuffing), and community member Hannah backed me up with science! Apparently, carbs help produce serotonin, which explains why they make us feel good on physical, emotional, and neurochemical levels.

The Great Sides Debate revealed some clear favorites:

- Stuffing was the runaway hit (especially when loaded with sausage, wild rice, or sweet potatoes).
- Brussels sprouts got creative treatments (bacon-wrapped or honey-sriracha-glazed)
- Green bean casserole made an appearance (with a controversial swap of cream of chicken for cream of mushroom).
- Deviled eggs sparked quite the discussion (with or without relish became our version of tabs vs spaces)

Speaking of debates, community member Todd shared that their office is running a "Sweet 16" style Thanksgiving food bracket, and stuffing is currently beating turkey! (I'm not saying I called it, but...)

The most unexpected insight? Community member Lisa's family has replaced traditional turkey with Ikea meatballs. Now that's what I call disrupting the traditional Thanksgiving data model!

My favorite part of this whole discussion wasn't just the recipes - it was seeing how passionate our community gets about food traditions. From community member Sandy's kids taking over Thanksgiving cooking (turkey in milk - who knew?) to community member Tiffany's "couple handfuls of this, couple shakes of that" stuffing recipe, it's clear that the best analytics aren't always about precise measurements.

Special shout-out to the canned cranberry sauce—a classic that stands the test of time.

By the way, if anyone needs me next week, I'll be testing out community member Gerhard's smoked turkey method. Because if there's one thing I've learned from our community, it's that you should never stop experimenting—whether with data or dinner.

Happy Thanksgiving, analytics fam! May your plates be full and your dashboards be accurate.

(P.S. - If anyone wants to share leftover stuffing, you know where to find me...)

December 04, 2024: Securing Our Digital Ghosts

The concept of a “digital ghost” has been on my mind lately, [sparked by a recent conversation with Chris Penn](#). For those unfamiliar, your digital ghost is the collection of your work—emails, content, call transcripts—that lingers on long after you’ve left a company. In the age of generative AI, this ghost could theoretically be reanimated, mimicking your work style and processes to create value for the company, without you being there.

Let’s be clear: this isn’t science fiction. It’s very much possible. As Chris pointed out, a skilled AI practitioner could use your digital ghost to replicate how you worked when you were there. This reality raises tough questions about governance, ethics, and employee rights. What are we doing as companies, as employees, and as an industry to ensure these technologies are used responsibly?

The Ethical Challenge of Digital Ghosts

The issue isn’t just that digital ghosts exist—it’s that they can be exploited. Under typical “work-for-hire” agreements, anything you create for a company is owned by them. This means they could potentially train AI on your work and continue benefiting from it indefinitely, long after you’ve moved on.

This hits at the core of something I value deeply: treating people with respect and fairness. It’s one thing for a company to retain your work as part of its knowledge base; it’s another entirely for that work to be repurposed by AI without your knowledge or consent.

The bigger issue, as Chris rightly noted, is that companies need strong governance and retention policies to even manage this kind of data responsibly. Yet, in many organizations, these systems don’t exist or are woefully inadequate. Without them, we risk falling into the trap of using AI as a shortcut—exploiting digital ghosts instead of valuing the living, breathing people who bring real innovation to the table.

How We Can Do Better

As I reflected on this conversation, it became clear that addressing these challenges systematically is non-negotiable. This is where the **5P Framework**—Purpose, People, Process, Platform, and Performance—can be especially helpful:

- **Purpose:** Why are we retaining this data, and how do we plan to use it?

Companies need clear policies that define permissible uses of data and align with ethical standards.

- **People:** Who has a say in these decisions? Employees should be part of the conversation about how their work is used, even after they leave.
- **Process:** How are we managing this data? Strong processes ensure that data is handled responsibly and transparently, reducing the risk of misuse.
- **Platform:** What tools are we using? Platforms should prioritize security and accountability, ensuring that data is used only as intended.
- **Performance:** How do we measure success? Governance isn't a one-and-done task—it requires regular audits to ensure that policies are being followed.

Using this framework, companies can evaluate their current practices and identify gaps. For example, do you have retention policies that clearly outline what happens to employee-created data? Do your contracts include clauses about training AI on this data after an employee leaves? These are the kinds of questions organizations need to start asking—right now.

Lessons from Experience

One of the recurring themes in my career has been the need for strong governance and process development to prevent problems like this from spiraling out of control. It's not always easy, and it's rarely quick, but the work pays off.

For example, when I've helped organizations evaluate their data practices, we often start with what's already in place. Do they know where their data lives? Who owns it? How it's being used? From there, it's about building workflows that ensure transparency and accountability. These processes aren't about controlling employees—they're about building trust, which is ultimately better for everyone.

It's also worth emphasizing the human element here. Generative AI and digital ghosts challenge us to think about what makes our work unique. AI can replicate patterns, but it can't replace creativity, experience, or judgment. By investing in governance and ensuring ethical AI use, we're not just protecting data—we're preserving the value of human contribution.

What Comes Next

The conversation about digital ghosts isn't going away, and it's one we all need to engage with, whether we're business leaders, employees, or somewhere in between. If you're part of an organization, now is the time to start asking hard questions about your policies and practices. Are you thinking about the long-term

implications of how AI is trained on your data? Do you have a plan for managing employee-created content responsibly?

And if you're an individual, it's worth considering what rights you might want to protect in your contracts. This is still a relatively new area, but the decisions we make today will shape how we work with AI in the future.

We're all navigating this space together, and there's no single right answer. But by taking a thoughtful, intentional approach—whether through frameworks like the 5Ps or simply asking more “why” questions—we can chart a path forward that balances innovation with integrity. Let's keep this conversation going, and let's commit to doing better.

Let's Take the Next Step Together

Since we're now full throttle getting things done for the end of the year and 2025 planning, let's collaborate. I want you to succeed, and Trust Insights can help! The reality of digital ghosts is a wake-up call, and it's not something to tackle alone. Whether you're evaluating your current governance practices or looking to build them from scratch, Trust Insights can guide you every step of the way.

Here's how you can get started:

- **Schedule a Consultation:** Let's discuss your organization's unique challenges and how we can help. [Click here to book a meeting.](#)
- **Download the 5P Framework Guide:** Learn how to apply this powerful tool to your governance strategy. [Download the guide here.](#)

December 11, 2024: Why Organizational Health Outshines Tech Trends Every Time

I just finished another conversation where a client was panicking about not having the latest AI tool. After walking them through their actual needs, I had that familiar aha moment: we're still chasing shiny objects instead of focusing on what really matters.

I've been guilty of this too. Last year, I spent weeks obsessing over a new analytics platform that promised to revolutionize everything. Spoiler alert: the revolution didn't quite materialize. What did make a difference? The time we spent helping our team understand and embrace the changes.

The Only Constant Is Change—And Health Is Your Competitive Advantage

Real talk: The companies crushing it this year weren't the ones with the biggest tech budgets. They were the ones who had their organizational house in order.

Quick example: One of my favorite clients spent the first half of 2024 resisting the urge to jump on every new trend. Instead, they invested in weekly team connections and clear communication. When a major industry shift hit in Q3, guess who adapted faster than their "more advanced" competitors? Yep, them. Their secret weapon? A healthy organization.

What Does "Healthy" Look Like?

Let's look at it through the lens of the 5P Framework. [You can get your version here.](#)

Purpose

Remember when everyone was scrambling to launch an AI chatbot? The healthiest companies stopped and asked, "How does this actually help us serve our purpose?" Perhaps you need to redirect your budget to improve your customer support system instead.

People

Let's say your team is struggling with new collaboration tools, but no one wants to admit it. If your leadership team shares their own challenges, you're setting the tone and creating a safe space. That one moment of vulnerability transformed their entire culture into one where "I don't know" became okay to say.

Process

Sometimes we get so excited about new trends that we don't stop to ask if we should. Introducing new things into an existing process can get messy and complicated. It's okay to say not now, or even no.

Platform

Oftentimes, the best tech stack isn't the newest—it's the one your team actually uses. Stop and do a tech stack audit and ask some basic questions:

1. Does this serve our purpose?
2. Does our team use it confidently and consistently?
3. Does it make work better or just different?

Do this audit, trim that fat, and then see if it makes a difference in your output.

Performance

I used to be a metrics junkie. I wanted to see all the numbers all the time. But numbers don't tell the whole story. The healthiest organizations now track things like team well-being, collaboration effectiveness, and adaptability. (Yes, you can measure these!)

What Actually Worked in 2024

What did we learn in 2024?

1. **AI found its place—not** as our replacement, but as a tool for skilled teams.
2. **Relationships beat tools** - the companies thriving in our AI-driven industry? The ones who never stopped focusing on human connections.
3. **Simple > Fancy** - teams that simplified their tech stacks are positioned to outperform those who kept adding more. Why? They can be more agile and more adaptive. Don't overcomplicate it for your teams.

Building Resilience for 2025

Something new and “revolutionary” will pop up next year that everyone will insist you must have. Instead of chasing trends, focus on:

- Making learning a daily habit, not a checkbox. Invest in yourself and your team’s continual learning.
- Building real communication muscles. Make sure that your “open door policy” isn’t just lip service. Make an effort to be honest and transparent. Create a space where feedback is helpful, not hurtful.
- Creating cultural resilience. Change is inevitable. How you handle it within your organization will make or break your culture.

Tech trends are exciting. They promise to solve all our problems. But, after another year in the trenches, I know this: the organizations that thrive aren’t the ones with the most tools. They’re the ones with the strongest foundations.

Let’s make 2025 the year we focus on what really matters: building organizations where people thrive, purpose drives decisions, and change is an opportunity, not a threat.

And yes, we can still get excited about new tech—maybe after we’ve had our coffee.

December 18, 2024: Trust Insights' Top-Performing Content for 2024

It's the end of the year. This has been simultaneously the fastest and slowest year ever. I feel like January happened eight years ago, and at the same time I'm wondering, where did the year go? This year has been challenging (to say the least) and rewarding (much to my surprise).

I'll keep it short and sweet. Your attention span is waning and my energy levels are depleted. Neither of us wants to be doing anything work-related right now. And that's okay! We're going to take the next week or two to reset ourselves, take a break, and get some rest.

In the meantime, I figured I would leave you with our top-performing posts from this past year. In case you missed them, or just want to revisit, here is the content that you loved the most!

[#1 The Trust Insights 5P Framework](#)

To say I'm shocked and dazzled that this is our most popular content is an understatement. The 5P Framework has become the backbone of everything we do at Trust Insights. You know that feeling when you're staring at a massive project and have no idea where to start? That's exactly why we created this framework. It breaks down the essential elements of any marketing project: Purpose, People, Process, Platform, and Performance. If you're struggling with project organization or need a reliable way to tackle new initiatives, use the 5P Framework to get organized.

[#2 Generative AI for Job Interviews](#)

This one really connected with our community, and I get why. We walk through practical, ethical ways to use AI in your job search and interview prep. If you're job hunting or helping others who are, this post gives you concrete steps without crossing ethical lines. It's a tough job market both for job seekers and those looking to fill roles. You need every advantage you can get.

[#3 The Prompt Engineering Life Cycle](#)

Prompting generative AI has become its own skill set. As the technology advances, so does the need to understand how to get the best out of it. Published in March of this year, we put together a framework to help you get the most out of the models. If you want the latest and greatest, check out our [RAPPEL framework](#).

#4 How to Use Generative AI to Audit Content Marketing

If 2024 taught us anything, it is that we can allow the machines to do the heavy lifting. In April, we did a livestream using generative AI to do a content marketing audit. We demonstrated a practical framework for using AI to audit your content marketing. This demo went beyond counting words or checking SEO basics. Moving into 2025, the expectations of your workload will only get bigger. Start using the tools to your advantage.

#5 Solving Data Problems with Generative AI

Have you ever looked at a spreadsheet and thought, "There has to be a better way"? Yes, me too. Just the other day, actually. I pinged Chris to help me with our content marketing planning. I was staring at two different spreadsheets; both needed to be cleaned and processed. I said, "There has to be a better way!" and lo and behold, there was! What would have taken me a few hours took Chris a few minutes.

What I love about this list is that it is reflective of what we do at Trust Insights day in and day out. It's not filled with navel-gazing "thought leadership" pieces that lack substance. It's practical and applicable advice that you can use right now and get real results. It's grounded in repeatable frameworks and sustainable results. These pieces of content show what we have always believed at Trust Insights. Innovative tools like AI are most valuable when paired with strong frameworks and processes. Put your people and processes first, and the platforms will work for you.

With that, I hope you all have a happy and healthy New Year - see you on the other side!

Alright, let's talk straight, like we do around here. You're juggling a million marketing priorities, and you know that data-driven decisions are the key to making them all work. The trouble is, you're probably stretched thin, and it's easy to get lost in the weeds. You need clarity, not complexity. That's where Trust Insights comes in. We are in the business of bringing the right data to the right people, and making it actionable. If you're battling vague strategies, or you want to connect to your audience better, we have the answers. Our data-driven approach is not just another buzzword. It's a framework that we've spent years refining that uses the power of analytics, all while putting your people and process at the forefront.

Our team doesn't just "do" analytics or AI. We dig deeper. We take your raw data and turn it into strategic insights. We will help you define an ideal customer profile (ICP) using data so that all your efforts are focused and intentional. We use a combination of technology and human expertise to create actionable plans. For example, using our customized generative AI tools, we can quickly analyze your existing data and give you a clear picture of who you're serving and their unique pain points. This isn't just data for data's sake. It's about creating strategic plans that resonate with your ideal customer, and drive measurable outcomes. We're here to make your data work for you, so that it's more than just pretty charts and graphs.

And when it comes to AI, we get the hype. We see how it could help your business. But we also see how easy it is to get caught up in AI and lose sight of what really matters. That's why our AI and analytics consulting services blend strategic thinking with AI power. We help you navigate and manage your AI transformation, not just chase shiny new tools. We'll ensure that your investments align with your business objectives. If you want a partner that doesn't get lost in the weeds but knows how to get the important stuff done, we're your team. We bring expertise, honesty, and a willingness to get in the trenches and do the actual work with you.

Learn more at:

<https://www.trustinsights.ai/aiservices>

Ready to talk?

<https://www.trustinsights.ai/contact>