



## A White Paper on Keith Bates role as a Creative Strategist

May 1, 2018

### Some thoughts from the advertising industry:

*From a Razorfish & Digitas help wanted ad: Leading digital ad agency Razorfish/Digital describes a Creative Strategist in a recent job offer description as: “People with brilliant minds that come together to make bold, award-winning advertising. They use data-driven insights to guide their work but they also believe in a healthy dose of spirited storytelling as they strive to transform the marketing landscape.”*

*From Simon James Dean on Google: “The Creative Strategist is a strange breed, a thinker and ideas person positioned somewhere between a planner, a copywriter and a researcher. They thrive in boutique-style brand agencies where clients and creative’s are always close by.”*



### Consider an inexpensive 60 day session with a Creative Strategist.

After 20+ years as CEO/Creative Director of a technology-oriented ad agency I now operate as a Creative Strategist consultant. I help client's bridge the gap between their corporate growth planning and their digital marketing execution.

There's a growing trend among marketers to cut back on agency fees by bringing initial work, like strategizing and theme/image development in-house or have it done by consultants/freelancers...leaving the digital media execution to martech firms.

Voice: 773.205.7992, Email: [keithbates@kbates.com](mailto:keithbates@kbates.com), Website: [www.kbates.com](http://www.kbates.com)



# Creative...

## The Creative Component...

### Examining the theme/image elements of creativity.\*

This is what to look for.

Because creativity is rearranging existing knowledge, Creative Strategists must be intimately familiar with many different disciplines.

They must possess ONE of the following two sets of personal traits: wholesome, confident, perceptive, charismatic — or— driven, uneasy, remote, sometimes neurotic.

Plus they must possess ALL the following character traits: a tolerance of ambiguity, disorder, tension, and conflict; a desire to create new order from disorder; and an ability to stand fast with personal visions and ideas in the face of group pressure.

Studies indicate that creativity and brilliant intellect do not fit snugly together ... creative persons have moderate to high intelligence but not many persons of phenomenally high IQs or memory are highly creative.

### Why do we preach integrated marketing communications?

Because repetition of emotion evoking messages is the only known way to assure penetration of the belief clusters that serve as cognitive dissonance filters.

Because message retention is dependent on the use of a variety of input vehicles. And because pictures are far superior to words when it comes to altering the brain chemistry required of both penetration and retention. ...so if you're contemplating a boring visual, or an all copy message you're in trouble.

## Probing the Mystery of Creativity

The Creativity process within our Marcom Engine consists of two key components: core intelligence & theme/image standards. This is the mixing bowl where the ingredients provided by the audit and strategy modules become core intelligence, and are blended with raw creative power to produce THE BIG IDEA (lightning bolt) which is the source of all communications energy and the basis for our theme/image standards.

This module is where the differentiating creativity occurs.

The generally accepted creative process follows these steps. PREPARATION, INCUBATION, ILLUMINATION, ELABORATION, VERIFICATION.

**Overpowering, or altering the Belief cluster often referred to as authenticity filters (or the bullshit factor) represents a serious challenge to the creative mind.**

The real target of our efforts is not defined demographically (statistics), or psychographically (lifestyles) or even synchrographically (timing) ...the target is the brain...and the challenge is to change attitudes, which in turn change behavior. Attitude changes occur through changes in brain chemistry ... so think of yourselves as chemists ... working on penetration and retention.

The paradox: The quirky unknown doesn't stick unless you successfully help your reader relate it to the known.

**The four most feared words in marketing communications? I DON'T BELIEVE YOU!**

\* Extracted from MindWorks by Charleen Swansea.

# ...Strategist

## The Strategist Component

### Examining the marketing elements of strategy.

This is what to look for.

Keith Bates Marcom Engine is a systems approach to the process of sales and marketing. It evolved from experience gained as a sales/marketing communications consultant to more than 200 B2B marketers over the years and blends the disciplines of Business Process Reengineering (BPR) and Integrated Marketing Communications (IMC). It drives revenue enhancement by reducing the waste and inefficiency of the typical random task approach to communications and consists of six modules: three for planning and three for execution. Today the focus is on Planning.

#### Benefits

##### Improves return on marketing dollars by:

- Compressing response times to speed up leads, market awareness.
- Greatly improving message retention and intensity of repetition.
- Substantially improving message penetration.

#### Inspiration

The Marcom Engine's inspiration was simply the problem of waste and inefficiency of the typical random task approach to the sales and marketing communications process. By random task we refer to the common practice of shooting from the hip, of trying first one media, then another, of changing creative horses midstream endlessly while hoping something will be productive but never applying adequate tools for measurement. This problem often goes hand and hand with failure to apply quality control to creative standards...and unimaginative responses to competitive positioning strategies.

## Origin of the Strategist

Over the past several decades the author spent a great deal of time counseling senior management and marketing executives on developing more effective communications programs. And in the process discovered that executive frustration with the universally poor return on marketing dollars is quite commonly due to a lack of understanding and/or faith in the marketing communications process coupled with the age-old curse of inadequate accountability.

The Marcom Engine evolved from all those years of counsel. It is an application of the underlying principles of both Business Process Reengineering developed by Michael Hammer and James Champy in their seminal book Reengineering the Corporation; and the equally relevant Integrated Marketing Communications by the book of the same name written by Don Schultz, Stanley Tannenbaum and Robert Lauterborn.

Quite simply it's a database (repository) and a methodology focused on "Best Practices" and improved business processes to enhance revenue and reduce the dilution of sales and marketing communications dollars.

Specifically it advocates a much greater depth of customer knowledge and involvement than the norm, a unique concept of creative formatting, and the development of a team approach for its implementation. Initially it's more work than the traditional non-integrated process but it offers benefits that range from simple survival to dramatic growth.

We have the evidence to prove it works! And once both database and team are up to speed you'll be able to do product launches almost overnight...with major improvements in sales, marketing productivity and profitability.

# Positioning

## Blue Ocean Positioning

### Exploring the *positioning* concept.

Where do you begin? The process starts with the Planning module and development of a Communications Support Plan based on a process Keith was introduced to many years ago when he helped IBM launch DB2.

First requirement is an Audit which embraces primary and secondary market research, communications audits both internal and external, and a review of the six paths approach detailed in the book *Blue Ocean Strategy*.

Second is the Strategy process which includes the messaging, media, and market development check list. It also builds on the Blue Ocean Strategy canvas, reviews their value innovation concept, and considers their four actions framework.

Third is the Creative process which combines Blue Ocean's Visualizing Strategy with the Trout & Ries Positioning Concepts as well as Keith's creative skills at mixing core intelligence (extracted from Audit and Strategy) with text and images to develop the BIG IDEA.

#### **And what is blue ocean *positioning*?**

**Blue ocean *positioning* is simply exploring the development and management of a marketing strategy adapted from the Blue Ocean Strategy book.** The strategy of the book is designed to reposition an existing company or a newly formed company, utilizing product and pricing changes, into uncontested market space which hopefully makes the competition appear irrelevant.

Keith's Blue Ocean Positioning however does not advocate product and pricing changes but strives to refocus a company's positioning within the market they have already defined for themselves. Powerful creative perception creates the critical feeling of differentiation.

#### **Some thoughts from "Blue Ocean Strategy"**

What consistently separates winners from losers in creating blue ocean companies is their approach to strategy. Successful creators of blue oceans don't use competition as their benchmarks. Instead they follow a different strategic logic called value innovation which focuses not on beating the competition, but by making them appear non-competitive.

#### **And from "Positioning: The Battle for Your Mind.**

Remember, positioning is not what you do to a product, it's what you do the mind of a prospect. Branding is an element of this process.

#### **We will start with the Planning module. The Execution Module comes later.**

Acting as your company's Creative Strategist, Keith will develop and manage the Planning phase of your marketing's Positioning strategy which embraces a marketing audit, an overall Sales/Marketing strategy, and the Communications creative components required to take your message to market.

To capture increasingly savvy customers' imaginations and wallets, both differentiation and low cost are needed. *Blue Ocean Strategy* contends that you can't offer one without the other. However, to stand apart in the world of marketing positioning you need to be creative through value innovation. It's a challenge, but doable with the right resources. It's our plan to make your company's market space uncontested.

#### **Keith does the Planning, and assists in coaching the Execution.**

Following the Planning Module comes the Execution Module consisting of your Arsenal development, your messaging Deployment tactics, and various Measurement processes. Keith will coordinate these efforts through one of his partner ad agencies or assist by coaching your in-house marketing staff.



# Keith Bates bio

## Bio / Executive Summary

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### WHO IS KEITH BATES?

Keith Bates founded Keith Bates & Associates Inc. over 20 years ago. The company performed for many years as a high tech ad agency/creative boutique, and more recently as a marketing consultancy for B2B businesses.

He served the sales and marketing needs of more than 200 B2B clients, including technology vendors, ranging in size from IBM to VC funded startups.

Bates' core competitive advantage stems from his powerful creative skills, strategic planning expertise, and an uncommon ability to translate complex product technologies into easily understood user appeals.

The company has won over two dozen ICP Advertising Achievement Awards which were given for achieving specific sales levels, not for simple esthetics.

During those years Bates, acting as a serial entrepreneur, also founded seven other companies including a high tech PR firm, a software company, a social network, and several companies in the travel industry.

Operating as one of the nation's leading high tech ad agencies for many years KBA has recently evolved into a marketing counsel and creative strategist firm in support of B2B and tech industry clients both nationwide and internationally.

The Marcom Engine, developed by Keith in the '90s, is the backbone of the firm's efforts and was developed by combining the disciplines of Business Process Reengineering and Integrated Marketing Communications. Keith is a well known professional in the field of high tech marketing communications, a speaker at many industry conferences, contributing author to numerous industry publications, and has been a communications consultant to Boeing, Computer Associates, JD Edwards (now Oracle) IBM, KPMG, SPSS and many others. His career began many years ago with Foote, Cone & Belding, then the world's leading consumer ad agency.

Functioning since 2000 as a virtual ad agency/consulting firm Keith Bates manages an international network of strategic planning consultants, technology marcom writers, and web designers as he delivers marcom strategies and innovation consulting services.

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*“One of the original superstars of the technology marketing world....Cannot begin to tell you the impact this man has had on companies like Pansophic all the way to Platinum technology, inc...The best of the best....”Andrew ‘Flip’ Filipowski, hired Keith as a marketing exec to help launch DBMS, Inc.*

# It's the Message, not the Medium!

## KEITH BATES MANIFESTO

Marshall McLuhan was wrong.  
Dead wrong.

In 1964 he said "The medium is the message" and since then, facile-minded people have run with that, again and again, and most recently with social media.

My mission is to correct the damage done by McLuhan and his followers. And this includes positioning social media into its proper role within the world of BtoB marketing tactics.

The reality is that The Message (content) drives the Medium, not the other way around. The Medium (conduit) must always serve the message. People are influenced by the content of the Message not the "package" in which it is delivered. Social media plays a secondary role behind the Big Idea, the heart of marketing's Creative Strategy that determines success or failure.

McLuhan's statement is that he feels the vehicles for distributing marketing messages (social media) are more important than the messages (ideas) themselves. Seriously?

My ambition is to restore yesterday's emphasis on the power of the Big Idea, known as the lightning bolt that has been employed for decades in building persuasive concepts. The curation of social media can impact the message, but it can't create it.

My passion is to help today's BtoB marketers understand the importance of gathering the social input (called Content) reworking and strengthening the creative component, and then using the media simply to redistribute.

As for McLuhan...point made!  
Without content the medium is a hollow pipe.

Article below appeared in an ITA Blog Post December 2, 2013

## What counts is the Message. Not the Medium. Its time Social Media marketing was put in its place!

*By Keith Bates, CEO, Keith Bates & Associates, Inc.*

It's true. Social Media is valuable, but simply as a tool for the distribution of the content/messages (better for BtoC than BtoB) that impacts sales and branding. Messages in turn are heavily dependent on neuroscience and its ability to alter the brain chemistry required of changing a prospective buyer's attitude.

### Hollow pipes (social media) lack brain altering power.

The real target of our messaging efforts is not defined demographically (statistics), or psycho graphically (lifestyles) or even syncrographically (timing)...the target is the brain, and the challenge is to change attitudes or beliefs, which in turn change behavior. Behavior that says don't put this off "buy it now!"

### So now, the case for mind altering creativity.

The challenge for marketing creativity is to overpower, or alter, the belief cluster (sometimes referred to as the bullshit factor) that delays a prospect's desire to purchase what you're selling. Attitude changes occur through changes in brain chemistry ... so think of yourselves, not as product managers but as chemists... working on penetration and retention.

### Hollow pipes/conduits (social media) require messaging content ...or they are worthless.

Where does this content originate? From both the developers of the product and the users of the product. In today's world they influence one another. In yesterday's world of interruption marketing it was a one way street. Not anymore. Feedback colors the content. But the point I'm making is that without viable content there is no need for media, social or otherwise. The question isn't one of inbound vs. outbound marketing. It's about the integration of core intelligence with text and image to create emotion evoking messages.

## On the plus side social does have a role in creative...

Another way in which messaging evolves. Think about the following quote from DJ Edgerton, CEO, Zemoga, “One of the beautiful and disruptive components of social is that the cream rises to the top. The creative director doesn’t (always) decide what’s best—the audience does.”

As a way to help put social media in its proper perspective I’d like to offer the following brief excerpts from the book Converge, a superb review of today’s creative vs. social media situation drafted by Bob Lord/CEO, and Ray Velez/CTO of Razorfish... “Creativity is no longer the exclusive province of marketing and creative exclusive province of marketing and creative departments. Great ideas might come from crowd sourced creative platforms...or from your consumer, who is using social media to give you an easily accessed, always-on suggestion box for your product or brand.”

“The role for the executive creative director—or any other very senior creative’s—has become curation, not just idea generation, and collaboration.” The feedback from social needs to be gathered, reviewed, edited and put back into circulation.

And one final thought from Andrew McMains, in AdWeek, “The shift (to hire Chief Content Officers) signals a desire among media shops to evolve beyond media buying to become bonafide players in content creative. The competition is fierce with creative, media and production companies all vying for that work.

Which creates a whole new role for today’s CMO who is rapidly becoming known as a Content Marketing Officer rather than yesterday’s Chief Marketing Officer.



# FREE Advisory Offer

This page offers a simplified outline of the Planning phase of the Marketing Plans I have been delivering to my ad agency clients for over 20 years. Typical cost: \$5,000/\$25,000 depending on the size of the company and the market, and includes a detailed plan plus design of a website home page.

As an introductory offer I'm delivering a **FREE** assessment of your website vs. competitors plus a website design example detailed by the application of the **two copy blocks below in red.** **▶**  
**TO PUT IN MOTION SEND AN EMAIL TO: [keithbates@kbates.com](mailto:keithbates@kbates.com), OR CALL 773.205.7992**  
**and let me know of your interest in getting started. We'll schedule a visit.**

## Planning Stages are created and delivered by Keith Bates

### MARKETING AUDIT

- **▶ Appraisal of your situation: product, market, competitors messaging components**
- Primary market research
- Secondary market research
- Marketing audits, both internal and external
- Influencer relations and location of network hubs
- The customer development model / business hypotheses
- Primary and secondary drivers of Social media insights

### MARKETING STRATEGY

- Determine whether company is in Startup or Growth Mode
- Market Development Check List (as appropriate)
- Target Customer
- Marketing Objectives
- QuickChek analysis of your Communications Objectives, Strategies, and Tactics currently used
- The Strategy Canvas
- Value Proposition Design
- Value Innovation
- Blue Ocean exploration

### CREATIVE STRATEGY

- Understanding of the full Creative Process
- Why We Preach Integrated Marketing
- The Challenge For Creativity
- Why Outsource To A Creative Strategist
- Creative Elements Within The Program
- Branding Issues
- Positioning Issues
- **▶ Exploring a set of Theme/Image Concepts for your marketing communications**

## Execution Stages come from Keith Bates' partners

Upon completion of the Planning stages above, the Execution stages below begin by sharing the data with a digital agency, martech firm or the client's CMO for Keith to continue coaching if desired.

### BUILD AN ARSENAL

Resources include online technologies, offline collateral and content, marketing database, social media, CRM/Sales Force Automation, web analytics, SEO, SEM.

### DEPLOY MEDIA

Word of mouth marketing, traditional PR, influentials, viral marketing/seeding, accelerated contagion, social media, channel support, event and experiential marketing .

### MEASURE RESULTS

Measurement metrics and ROI tracking, cloud potential management tools, marketing impact of word of mouth, social media listening, social media analytics.