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TOP CASE STUDIES IN PR

GUIDEBOOK

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Foreword

Dear reader,

"Experience without theory is blind," wrote Immanuel Kant, "but theory without experience is mere intellectual play."

It is with this in mind that we bring you 200 pages of experience in the form of the seventh edition of PR News' Top Case Studies in PR Guidebook. As much as we value all of the ideas and advice we hear from the communications pros in our community, we find nothing quite so inspiring as the real-world stories of how they put their expertise to work when an important project is at stake.

Each case study in this guidebook, ranging from crisis management to internal communications to product launches and beyond, lays out the objectives at hand and a firsthand account of how the campaign was executed. Our authors give you an inside look at the workings of their cases and point out how the tactics and strategies therein can be applied to your own initiatives.

For example, Linda Rutherford of **Southwest Airlines** walks readers through how her team dealt with a potentially devastating technical outage. Her advice is sometimes counterintuitive—don't play it too safe, she says, and try new tools you may not be perfectly comfortable with yet if they get the job done.

For **Conservation International**, novelty also played a factor: The brand's foray into 360-degree video was complicated, and marketing director Maureen McCarty describes what she learned about how to roll out such a campaign—and that sometimes, less communication can be more.

Throughout these case studies, we offer you bonus materials such as calendars, org charts, checklists and visual examples to make it easier to put the wealth of advice you find here to work for you. We thank our expert authors for sharing the methods behind their accomplishments, and we hope you can build on their work to create the great communications campaigns of tomorrow.

Sincerely,

Ian Wright
Managing Editor, PR News

PRNews

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How to Design a Trade Show Marketing Strategy That Delivers Results

By Michelle Bizon

Before 2017, rust-prevention specialists **Green Packaging** had never left the annual Metalcasting Congress with a follow-up consultation scheduled. Like many B2B business owners, Green Packaging's Wayne Siefert believed in the power of trade show marketing but had yet to attach business goals to, or develop a comprehensive strategy around, his trade-show activity.

Green Packaging falls into what we call the neutral scenario: Siefert attends trade shows and applies some foundational promotional strategies but sees mixed results. He adds new contacts to his email database, catches up with longtime customers and even gifts a new in-demand gadget to one lucky attendee as an incentive to visit his booth. He knows he generates new business from this, but he's not sure how much—and he knows he could be getting more out of his investment.

In preparing for the 121st Metalcasting Congress, held from April 25 to 27, 2017, in Milwaukee, Wisconsin, Siefert decided to upgrade his trade show marketing strategy. So he enlisted **Moving Targets**, a direct-response marketing agency, to help create and execute his campaign.

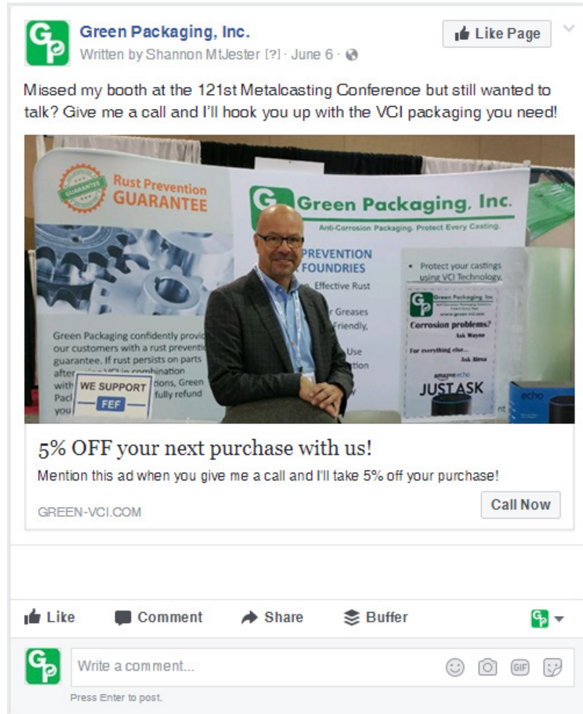
Plan the Work and Work the Plan

Over several conference calls, Siefert and his marketing team at Moving Targets agreed upon a strategy for his upcoming trade show. They devised a three-pronged approach to reach attendees before, during and after the

During the show, Siefert wanted to run an offer with a personal touch. We ran a Facebook boosted post with a $50 gift card promotion to encourage attendees to visit Siefert and (virtually) introduce Maureen, Green Packaging's receptionist and clients' go-to source for orders and questions. Credit: Wayne Siefert, Green Packaging

To-Do Checklist: Before the Show

- ☐ Begin planning months before the event. Trade shows are a huge investment in both time and money. You've likely registered and requested a booth months in advance, so you have little excuse to procrastinate on your promotion strategy. Especially if you intend to use direct mail or dedicated landing pages for promotion, you'll need to meet deadlines at least a few weeks in advance to account for design, proofing and delivery.
- ☐ Establish your "why" and set goals. Are trade shows something you've just always done? Especially if you know you generate some business but aren't quite sure how much, it's time to set some goals. Are you looking to fill your funnel with new, qualified prospects? Are you looking to close leads at the show, specifically? Describe, in detail, what success looks like to you.
- ☐ Design your booth and messaging. This is the time to plan your engagement and follow-up strategies. Obviously, you want attendees to remember you—and buy from you—so what will you do to stand out from the crowd? This should be reflected in your booth setup, handouts, giveaways and marketing messaging. Decide on a clear, compelling call to action (e.g., 10% off) to integrate into every aspect of your outreach.
- ☐ Spread the word. Drive attendance to and participation at your booth by promoting it before the event. This can take the form of targeted social media or Google ads, video, organic social media posts, email outreach, texts or physical mailers. Depending on your goal, you may want to develop a dedicated landing page with your CTA and additional resources. Be sure to make your digital content mobile-friendly, since many trade show attendees will be using their phones or tablets.



After curating a Custom Audience of new prospects and show attendees, we ran another Facebook campaign to encourage these folks to call Siefert directly to place an order—with a 5% discount, of course. Credit: Wayne Siefert, Green Packaging

show and incorporated both print and digital media. Siefert's goal, since he already planned to attend the show and grow his email database, was to walk away with a handful of consultations scheduled.

To begin, they designed and mailed 3,000 postcards, measuring six by 11 inches, to a list of prospects Siefert considered likely to attend the show. The creative promoted the details of the show and Green Packaging's booth number. To add a sense of urgency, it promoted a 5% discount available only to attendees. They also ran Facebook local awareness ads that targeted attendees in the immediate vicinity, beginning two days before the show. These ads teased them with the chance to win an **Amazon** Echo smart speaker by submitting their contact information to Siefert.

Facebook ads served as their main promotional tool during the two days of the show itself. They continued their local awareness

Facebook local awareness ads helped us promote Siefert's booth before and during the show. We targeted users in the immediate area to reach attendees in town for the show, specifically. As an incentive to visit his booth, Siefert gifted one lucky prospect with an Amazon Echo. Credit: Wayne Siefert, Green Packaging

ads with the Amazon Echo giveaway and then added boosted posts to the mix. Since Siefert knew it'd be easy to get lost in the sea of literally hundreds of exhibitors, he wanted to run a more personal offer. This boosted post encouraged attendees to visit his booth and use this secret phrase: "Maureen says hi." In return, they'd receive a gift card. Maureen is

To-Do Checklist: During the Show

- ☐ Work the plan. Now that you've set your goals and designed your messaging, it's time to put it all into practice. Are you satisfied with your booth setup? If you have sales consultants or other team members manning your booth, run through scripts with them. Are they establishing rapport, communicating your unique sales proposition and making "the ask" for a sale or follow-up?
- ☐ Send reminders. Social media is the perfect channel to reach attendees during the show. If the event has a designated hashtag, be sure to use it! Post photos of yourself in conversation with attendees in front of your booth to encourage others to visit you. Live-tweet gems from the keynote or workshops that strike a chord with you. Remind attendees of the benefits of visiting you (e.g., personal consultation, discount, contest entry).
- ☐ Limit giveaways. You have a set number of hours to hook attendees, and you know they're not all going to be a good fit for your business. Consider limiting your giveaway to only those who give you their full contact information (or another qualification standard) to ensure you're spending your time wisely. That prize, gift card or discount should be used as a value-add with a potential customer—not wasted on some random passerby who has no and will never have any interest in your products or services.
- ☐ Give them something to remember you by. Make sure prospects leave with something with your contact information on it. This can be promotional swag, such as a T-shirt, pen, sticker or notepad, or your marketing brochures and handouts. When you follow up after the show, this will give your leads a reference point for reconnecting with you.

To-Do Checklist: After the Show

- ☐ Follow up promptly. This is perhaps the most important trade show marketing strategy, since many exhibitors take too long to follow up—or don't do so at all. Make personal calls to each of your hot leads to build rapport and solidify the sale.
- ☐ Connect virtually. Run a de facto remarketing campaign to leads (and other qualified event attendees, if possible) via email and/or social media ads. This will remind them of the context of your connection—and the exclusive deal you've offered—making them more likely to answer your sales calls. You could also coordinate a sorry-we-missed-you social media ad or email campaign to go to attendees who didn't visit your booth or to prospects who weren't at the show at all.
- ☐ Measure your results. Once you've followed your leads to their conclusion, it's time to judge your results. Look back at the goals you set for yourself before the show. How did you perform against your expectations? Use both anecdotal and analytical evidence in your evaluation. If you met or out-performed your goals, look for opportunities to optimize your strategy. If you underperformed, determine the source: Was your strategy or execution at fault? Or was this specific trade show (or trade shows, in general) not the best fit for your business?
- ☐ Document everything. It's essential to document your goals, marketing collateral, correspondence and results from start to finish. For successful campaigns, you'll want to optimize your strategy and messaging for the coming year. For disappointing campaigns, you'll want to have a reference of what to tweak or avoid altogether.

Green Packaging's beloved receptionist and customers' go-to source for questions and orders, so this virtual introduction gave folks a good idea of whom they'd be working with.

These two promotions gave Siefert the opportunity to connect with many attendees one on one and share tips from his 20 years of experience running Green Packaging.

After the show, they ran another Facebook ad campaign targeting a Facebook Custom Audience of warm leads (i.e., the 35 contacts Siefert added to his email database) and general show attendees, which numbered around 2,200. These ads reiterated the 5% discount used in the pre-show promotion. Of course, Siefert followed up with his leads by phone as well.

Measure Your Results and Calculate Your ROI

Prior to leaving Milwaukee, Siefert lined up four in-person sales consultations. By following up, he closed three of these potential deals. The first of these sales earned Green Packaging more than $5,000 in business. Final sales figures for the other two are still being processed.

In non-sales results, Siefert reached thousands of contacts with his marketing and primed them for future messaging. With audience overlap in mind, his prospects can be segmented as follows:

- [Warm] 3,000 existing prospects who received postcards before the show
- [Warm] 35 new contacts qualified by Siefert during the show
- [Cold] 2,211 show attendees who could be served Facebook ads
- [Cold] 8,239 users who were served Green Packaging's Facebook ads during the campaign

To calculate Siefert's return on investment, the team analyzed his marketing campaign specifically. His other expenses (e.g., show registration fee, hotel and travel accommodations) were fixed costs he'd already committed to spending. The marketing investment was as follows:

- Postcard creative and delivery: $2,200
- Facebook ad creative, spend and management (package deal with postcards): $150
- Social media marketing program (of which additional Facebook ad creative, spend and management was a part and for which Siefert received 25% off that month): $486.50

This brings Siefert's marketing investment to $2,836.50, though his social media marketing program promoted other objectives that month as well. As such, his ROI for the campaign is roughly 76% so far.

Look Ahead to Next Year and Tweak Your Strategy

Reflecting on this promotion, there are several avenues for optimization. Given the success of the 2017 campaign, especially, it's likely Siefert could dedicate a larger marketing budget to promoting 2018's show. Opportunities for this budget include:

- A responsive landing page could serve as a hub for his offers, updates and sales collateral before, during and after the show. Visits to that page would fuel custom audiences that could be used to remarket to users on Facebook or Google in addition to the broader remarketing campaign used in 2017.
- In 2017, $106 was the cap for Siefert's ad spend. While he reached a substantial audience on Facebook, a larger ad budget would open the door to two options: split-test opportunities to evaluate other copy, CTA and graphic variations and the creation of additional targeted audiences, perhaps segmented by lead strength, to which they could serve ads.
- As an individual, Siefert's time and effort are capped. Bringing along another team member would double his potential to pull in and build rapport with attendees. Said team member could also, instead, be used to support his marketing efforts by taking photos and video, live-tweeting the show, running flash promotions from the booth and handling lead collection—so Siefert can focus exclusively on building relationships.

With one year of tracking under their belts, Siefert and his team should prepare themselves to judge the long-term value of trade show marketing for Green Packaging. They should, for instance, include his cost of attendance and travel expenses in the overall investment. They also should look to compare the lifetime value of trade show customers versus those secured through referrals or other means. Similarly, they should add trade shows to a multi-touch attribution model to evaluate the payoff of Siefert's connections months or years down the line. ■

Michelle Bizon is director, strategic communications at Moving Targets. @meeshkatweets or mbizon@movingtargets.com

Southwest's Collaborative, Innovative Response During a Nationwide Outage

By Linda Rutherford

On July 20, 2016, around 1 p.m., customers started tweeting **Southwest Airlines** concerned they couldn't check in online or use kiosks at airports.

Soon, we identified failed equipment negatively affecting the website, Southwest.com, a variety of operational systems, and functionality at airports. By 2 p.m., the failure was resolved; however, all flight activity halted until key systems could be restored. By 3 p.m., flight activity resumed with solid indications that recovery was imminent. But was it? Data backlog hampered our operation over the next three days.

On day one, airport personnel used manual check-in/boarding procedures while waiting for system recovery. Customers who couldn't print boarding passes couldn't travel, resulting in lines at ticket counters and gate areas, and customers couldn't be contacted with the impact to our email system.

The technical outage lasted approximately 13 hours before all systems were back up and running on July 21, at 2 a.m. Repairing operational impacts took considerably longer; it was roughly noon on Saturday before Southwest was operating as normal—after canceling more than 2,000 flights over four days (out of about 19,500 flights total from Wednesday-Sunday) and affecting thousands of customers. The scale of issues was described by the Dallas Morning News as "unprecedented in American aviation."

At the heart of this crisis was our biggest challenge: How could we provide targeted communication to our customers and employees when our main channels for doing so were down?

We didn't have a lot of information the first time we went live. Being open about that, coupled with visible emotion, gave us the first indications of positive sentiment. People were upset with Southwest, but they were met with an apologetic face, delivering an authentic message.

One additional challenge: Just hours before the technology outage, our communications team soft launched the new Southwest Community external blog—an expanded and more interactive version of the former Nuts About Southwest blog. We had a robust communication strategy in motion for the soft launch, but that changed the moment our website went down. We regrouped on strategy and developed a plan to turn this negative into an opportunity.

Plan for the Unexpected

We regularly review our crisis plans and conduct drills in order to prepare for a variety of situations.

Our crisis communication objectives are:

- Demonstrate success in responding to the issue and our concern for anyone who may be affected.
- Defuse conflict or controversy, and reduce pressures facing Southwest Airlines as a result.

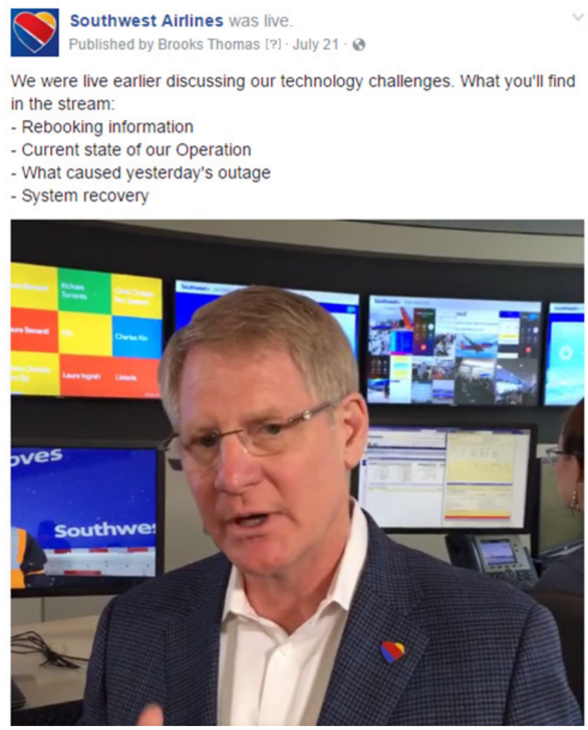
Business Objectives in a Crisis Include:

- Preserve our reputation and our brand.
- Protect the business: operate safely, maintain service quality, and consumer confidence/loyalty.

On Wednesday, July 20 at 3:15 p.m., we provided leaders with the first of many listening/measurement reports on this situation.

One process we have in place is a Potential Operational Problem (POP) plan, led by operational leaders, which provides updates and a forum for discussion. This process was immediately set into action on July 20. Throughout the next few days, Southwest leadership activated on 17 POP calls. These calls informed the cross-functional team handling the situation about the specific areas of need for communication and helped determine next steps.

Even with the well-rehearsed plan in place, it would take our 63-person communication team weeks to work through efforts related to this crisis.



We learned from our first live stream that we needed to lead with the most actionable info for active travelers before examining the cause and its fix. Then, we needed to explain why—despite a cause being in place—it was taking so long for the operation to recover.

Parallel Crises

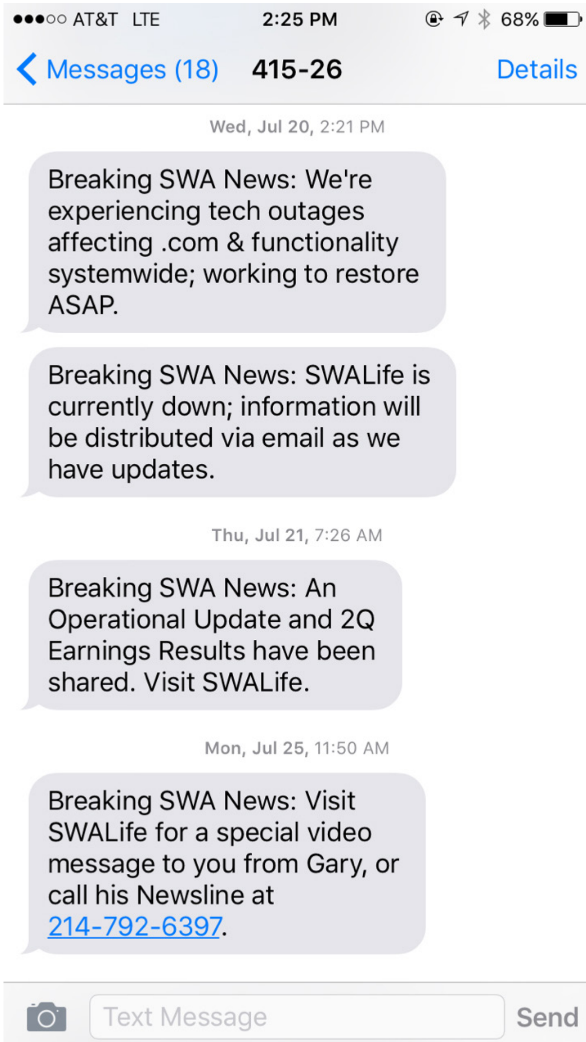
Initially, communication strategy focused on informing customers of the outage with no ability to send targeted messaging via email, text or phone, since that very system was impacted.

Quickly, we recognized the need to also focus on the internal crisis, as employees were significantly impacted since they, too, were unable to get to their final destinations. This created parallel paths because what we were communicating to customers was relevant to employees.

Our communication strategy drove our tactics, which focused on keeping our employees, customers, and media contacts informed early and often on not only their preferred channels, but some new platforms.

Our key internal and external messages fell into categories:

- How Southwest employees were processing travelers during the outage and providing customers crucial information



Text messages were one way we reached employees during the outage, to provide information they needed to serve customers.

for travel.

- Traveler and crew reaccommodation and aircraft repositioning in the subsequent days following the outage.
- Apologizing and making it right for our employees and customers.

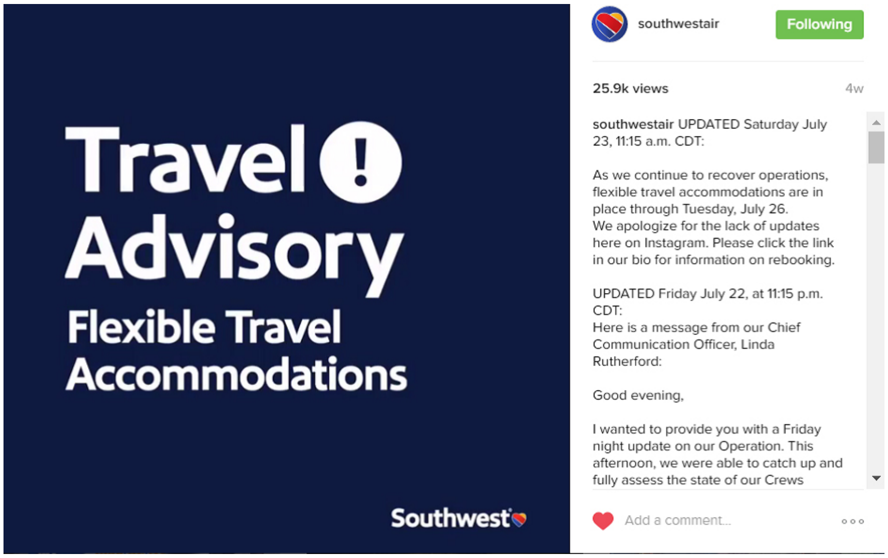
We wanted to ensure our messages struck the right tone, in the right place, at the right time. Our leadership was quick to apologize to customers, and thank our employees, who were not only trying to figure out how to do their jobs, but were also doing their best to accommodate stranded/delayed customers.

Tactics

To reach employees with information they needed to serve customers, we utilized text messages, email and digital signs; organic, employee-created Facebook pages and groups; and intranet blog posts.

Externally, we leveraged Southwest's social media properties. The Social Care Team had "all hands on deck" to quickly respond to the growing number of customer inquiries coming in through Southwest's multiple social media accounts. During the outage, the rate of customers reaching out to us each hour equaled the number we typically see in an entire day.

- **Facebook**
  Our first use of Facebook Live was implemented during this crisis. Our Facebook tactics leveraged multimedia-rich assets for a behind-the-scenes look, and to show the humanity of Southwest Airlines' customers and employees. We used geo-targeted messaging to meter sentiment in different states.
- **Twitter**
  Twitter communication focused on operational updates, and tweets frequently linked back to the Southwest Community for more information. Facebook Live videos were repurposed as Twitter video cards.
- **Instagram**
  Instagram was not recognized as an area of opportunity until day three of our recovery. The platform was used to apologize to affected customers and communicate about flexible travel accommodations. Subsequent updates were contained to a single post.
- **LinkedIn**
  We acknowledged the issue on LinkedIn, but did not continue a steady narrative there. The statement directed custom-



We used Instagram to communicate about flexible travel accommodations.

ers to the freshly-launched Southwest Airlines Community for information. The conversation was controlled in the comments section of the statement.

- **External Blog**
  The new Southwest Community soft-launched the morning of our system outage. We used the platform to communicate important updates and apologize to customers for the operational disruption. Updates were contained to a single post with information on the systemwide outage, operational disruptions, customer accommodations, and formal apologies. The site opened an avenue for customers to ask questions and receive updated information. Our customers were unhappy, but were appreciative of the transparency and interaction this new platform offered.

Measure Early and Often

We began providing communication measurement reports moments after the first customer tweet, and included a holistic view of the internal and external landscape (volume, sentiment, response, etc.). Measurement reports continued twice daily for a week.

The communications team distributed the first Listening Center Alert—an email to key internal stakeholders—to inform leaders and team members of the outage's initial impact. Our first Listening Center report was distributed to leadership shortly after conversation began in social media. These were sent multiple times a day and encompassed all social updates.

A comprehensive executive report tying communications metrics to business metrics (i.e. NPS, Brand Monitor, etc.) was completed immediately following the crisis, and an update was compiled two weeks later.

Measuring Against Our Crisis Communication Efforts

Customers were frustrated, but appreciative of quick information. Southwest mentions accounted for more than 48% of all airline conversation in social media from July 20-27. Customers were looking for information.

- Our three Facebook Live videos reached more than 4 million, with more than 1 million unique viewers.
- We experienced a 273% increase in video views on Southwest's Facebook page that week, compared to the previous week.
- There was a 43% increase in @SouthwestAir mentions handled by our Social Care Team.
- Our new Facebook fans grew 3,500+ on July 20, compared to an average 1,500 daily.

In traditional media, there were 5,000+ news media mentions. Our communications

All Hands on Deck

When you've planned for the unexpected, key players know their roles. But, as the crisis drags on, the team will need support (and rest!). Activate your entire team and designate clear roles.

Be quick and accurate.

"Tell it all and tell it fast" isn't easy when you're dealing with a complex issue that's still evolving. In the rush to get information out there, don't speculate. Give frequent, factual updates. Beware: quickness can sometimes be the enemy of accuracy.

Document everything.

There likely won't be a communication plan on paper (or time to create one) when you're in the thick of it. Strategy is ever-evolving. To remain consistent and bring some organization to the situation, document every single touchpoint. Southwest had approximately 160 forms of communication tactics used over a four-day period, and our careful records will be invaluable as we plan and drill for future emergencies.

Be honest and transparent.

It's OK to say "we don't know yet, but we're working to find out," rather than providing an answer you may have to correct later. Tell the truth about the situation, and get to the "why" behind it to the extent that you can. Explain the cause, the effects, and what you're doing to make it right.

Be authentic and genuine.

Be human. Raw emotion and genuine concern is key, and should show in your messaging. Make sure your customers and employees know you recognize what they're going through.

Think beyond traditional channels.

Find a way to leverage every available channel. In the heat of the moment, it's hard to think beyond your typical, go-to, "safe" channels. You should. We had never used Facebook Live, but this was definitely the right time to take that leap.

team fielded media calls from every major national news media outlet, and hundreds of local media outlets.

Customer Relations fielded 55,000+ emails and phone calls from customers.

Make timing work with you, not against you; seize the opportunity.

With regard to business objectives, the Brand Monitor Survey showed brand commitment took a hit during the outage…but core customers remained loyal. There was a temporary drop in our Net Promoter Score, but it rebounded quickly following the crisis.

Employees battled long hours on the frontline serving frustrated, delayed customers. Once our intranet recovered, traffic to the employee blog increased 10% during the outage, as employees sought information.

- Communications distributed 200+ messages on company channels.
- We saw 80,000+ page views to intranet posts about the outage.
- We moderated 1,000+ employee comments—the largest number of comments ever received on the employee blog. Sentiment was neutral to negative; employees were frustrated, tired, and looking for answers.

The New Southwest Community

Our plan to drive engagement on the Southwest Community blog the day of launch was unnecessary, as we utilized Community to communicate messages about the outage, which ultimately led to early adoption of the tool by employees and customers alike. Additionally, as customers discovered the new "Story Submission Form" functionality, we began receiving positive stories of employees going above and beyond, which we repur-

Why Facebook Live?

We turned to Facebook Live to satisfy multiple needs: First, to answer the numerous amounts of media inquiries coming into SWAMedia.com. Facebook Live allowed us to triage media inquiries, control the message, show sincerity and give everyone the same information at the same time. Secondly, we had a social need to connect with customers (whose mentions were now piling up in the tens of thousands).

We didn't have a lot of information that first night when we went live from our social media listening center, other than we were in the process of drawing down the operation. Being open about that, coupled with visible emotion in presented in our first Facebook Live video, gave us the first indications of positive sentiment. People were upset with Southwest, but they were now met with an apologetic face, delivering a very authentic message.

In the morning, we decided to go live a second time with our Chief Operating Officer. From the first stream, we learned we needed to lead with the most actionable info for active travelers before examining the cause and its fix. Then, we needed to explain why—despite a cause being in place—it was taking so long for the operation to recover.

We saw another boost in positive sentiment and a slight lull in Social Customer Care mentions. Let's be clear—volumes were still unmanageable, but even signs of progress were good indicators. Customers appreciated the information, transparency, and humility.

When we determined we weren't reaching quite as many people as we hoped, we boosted this stream with paid media. (This was the only budget used in this crisis response, and cost $14,400.)

posed into testimonials. Make timing work with you, not against you; seize the opportunity.

Hindsight Is 20/20

We exercised great communication and teamwork, but there is always room for improvement.

With our omni-channel approach, we heavily utilized social channels—Facebook, Twitter, LinkedIn, and the Southwest Community. If we could get a "do-over," we would use Instagram early on. We chose not to, since we typically use Instagram for visual storytelling disseminating visual information. So, naturally, Instagram wasn't top of list as a customer service platform during the first few days of the outage, but we soon recognized it was an oversight. We decided to test it as a source for information to issue travel advisories.

Instagram could have provided an additional source of information for customers and employees and guide them to Community or the Facebook page for more information.

At the End of the Day

Our collective reach was in the millions, and we saw spikes in positive sentiment with live stream-leading strategy. We've been recognized for being the first company to utilize live streaming to communicate during a crisis.

The Dallas Morning News wrote, "The outage—which ultimately led to the cancellation of 2,300 flights over four days and affected as many as 250,000 passengers—was a low point for Southwest, but the response by the company's social media team has drawn praise from experts and customers alike. The company's response, as well as its pioneering use of live streaming video during a crisis, serves as a prime example of the new role social media plays at major corporations."

In his "6 Unforgettable Lessons from

Southwest Airlines Social Media Crisis," social expert Jay Baer wrote, "Southwest took an innovative and effective approach to humanization through the use of Facebook Live video to keep customers informed and to underscore apologies." Baer added, "This may go down in the social media text books as the first big-scale use of live video in a social media crisis."

When all is said and done, we hope we'll be known for our great customer service and response throughout the outage, rather than the outage itself. ■

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