WEEK 2 OF 15 · MARKETING A MESSAGE IN THE AGE OF AI

Before You Optimize: Leaks and Offline Preconditions

Reading: *Marketing a Message in the Age of AI*, Chapters 2–3 · Christiano & Neimand (2017)

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TODAY'S SESSION

Two and a half hours, three parts

Time	Part	What happens
0:00–0:45	Discussion	Fix the leaks before buying more reach; the awareness trap
0:45–1:05	Briefing	Four preconditions to settle offline
1:05–1:45	Workshop	Map one partner's journey and find its constraint
1:45–2:30	Team work	Partner agreements; plan Assignment 1

FROM YOUR READING RESPONSES

If an organization you know doubled its reach tomorrow, how many of the new people would still be there a year later?

And how would you find out?

CHAPTER 2 · FIX THE LEAKS BEFORE BUYING MORE REACH

Before asking for more visibility, find out how many of the people you already reach are still there a year later, and why the others left.

Daily check: Of the people this will bring in, how many will still be here in a year?

THE SENTENCE NOBODY ARGUES WITH

Why “we need more visibility” always wins the meeting

Easy to count

Reach is pleasant to report, and its numbers go up.

Blames nobody

It places the problem among people who have not come yet.

Feels obvious

People who stayed assume everyone who hears the message will stay too.

What gets called a lack of outreach is often attrition that nobody wants to face.

CASE · THE TAVARES ORGANIZATIONS

Pouring water into a strainer

41,200

newcomers in three years: a first event or the introductory course

2,900

still taking part twelve months after their first contact

7%

stayed a year: 7 in every 100 newcomers

The proposal on Jussara’s desk: a campaign to double the number of newcomers in eighteen months.

THE SUM THE PROPOSAL LEFT OUT

Reach multiplies the retention rate; it never changes it

Each year	Arrive	Stay	Leave
Today (7% retention)	13,700	960	12,700
Double the reach	27,400	1,900	25,500
Double the retention (14%)	13,700	**1,900**	**11,800**

Same number of people who stay. No extra advertising. Less than half as many people leaving.

TWO NUMBERS NOBODY HAD PLACED SIDE BY SIDE

Cumulative figures cannot go down

400,000

people who had learned the practice since 1995, quoted for years as proof of impact

14,000

people who had taken part in anything during the previous two months

An organization can lose nine people in ten and still show a rising line every quarter.

THE RETENTION NUMBERS A MARKETING LEAD MUST OWN

Count by cohort, and see where people go

Since first contact	Still active, per 100	Where most were lost
3 months	38	In the weeks after the first event
6 months	15	Between the introductory course and regular practice
12 months	7	After the first volunteer assignments

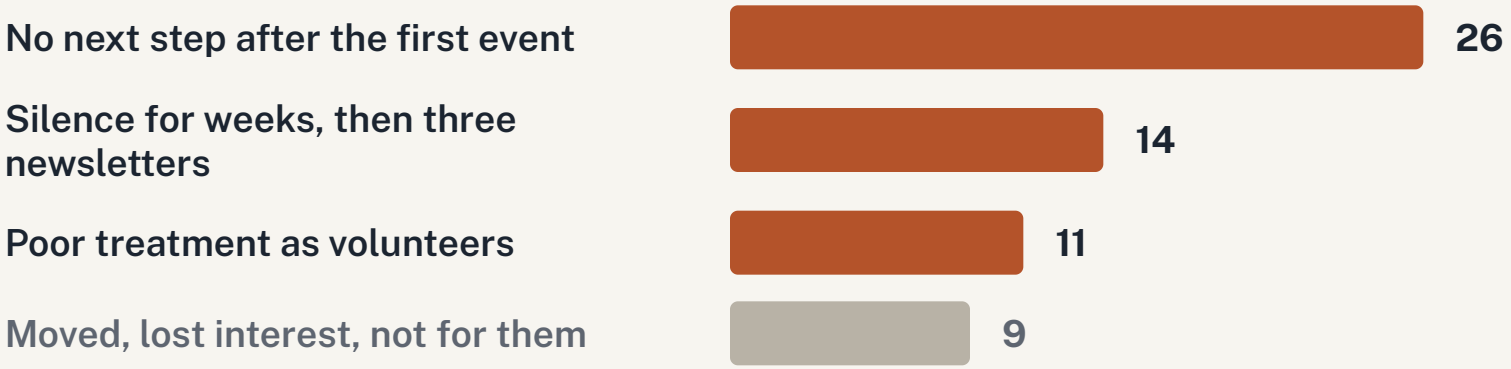
Newcomer: first event or start of the introductory course

Active: one recorded action in 60 days that required a decision

When: at 3, 6 and 12 months, same definitions every year

ASK THE PEOPLE WHO LEFT

What sixty people said when asked



51 of 60 left for a reason the organizations created. No survey had shown it: surveys went to the people who stayed.

MARKETING'S SHARE OF THE PROBLEM

Fix what is yours, report what is not

Fixed by marketing

- Every first event ends with one next step, repeated by message within 24 hours
- One welcome sequence (five messages, six weeks) replaces three newsletters
- Replies within two days, down from nine

Reported upward

- How volunteers are briefed, scheduled and thanked: eleven accounts, unedited, no names
- Any pattern of disappointment with the offering itself

A year later: active at three months rose from **38 to 55** per 100; at six months, from **15 to 24**.

WHAT IT COSTS TO KEEP POURING

Buying reach without counting retention costs three times

Money

$38 to bring one newcomer in. At 7% retention, more than $540 for each person who stayed.

Reputation

Each disappointed person keeps an account, shares it, and may reach the AI summaries.

The audience

Each person who came and left is harder to bring back than a stranger.

Retention is the cheapest reach an organization has, and the only kind that compounds.

THE READING · CHRISTIANO & NEIMAND (2017)

“Stop raising awareness already”

1. Why does “raising awareness” remain the default goal of so many campaigns?
2. What do the authors suggest a campaign should aim at instead?
3. Where does awareness stop and leakage begin in the Tavares case?
4. What is your partner trying to make people aware of, and what should they do next?

Stanford Social Innovation Review, Spring 2017

You can only optimize online what has already been clarified and optimized offline.

Daily check: Is what I am about to optimize already clear offline?

CASE · WHY ONLINE FIXES FAIL ON OFFLINE PROBLEMS

Ninety pages of fixes, and nothing moved

+38%

organic traffic in six months, after an agency's audit of the main site

Course registrations: flat

Jussara followed one newcomer's path by hand. A talk on the video channel linked to the foundation, which asked for a donation, and to the publisher, which sold books.

The introductory course lived on a third site. Neither of the first two mentioned it.

Five websites, four organizations, no map.

ABOUT TWO WEEKS OF PART-TIME WORK, BEFORE ANY OPTIMIZATION SPEND

Four preconditions, taken in order

A **Find the constraint**
tells you where to look

B **Clarify the journey**
shows what is broken

C **Clarify who does what**
shows who must repair it

D **Check that the promise holds**
tells you whether the repair is worth promoting

PRECONDITION A · FIND THE CONSTRAINT

Growth stalls for different reasons

The constraint	What it looks like	What it calls for
Awareness	People who would care do not know you exist	Discovery work
Relevance	They find you but do not see why it matters	A clearer claim, in their words
Credibility	They understand the claim but do not believe it	Independent voices
The offering	What you offer is not what they look for	Not a marcom fix
Experience after discovery	They arrive, then drift away	A repaired journey
Conduct or capacity	What you do does not match what you say	Not a marcom fix

PRECONDITION A · HOW TO TELL THE CONSTRAINTS APART

Each constraint leaves a different trace

Awareness: few visits from people who did not already know your name

Relevance: many first visits that end within seconds

Credibility: weekly questions about who is behind you and what others say

Experience: people register, attend once, and go quiet

Ask three sources: your analytics, the people who answer incoming messages, and ten recent newcomers.

PRECONDITION B · CLARIFY THE JOURNEY

One page, drawn from the newcomer's side

Unclear entry points

Several doors, each promising to be the place to begin.

Gaps

A step where nothing tells the person what to do next.

Overlaps

Two teams doing the same step differently.

Then ask five colleagues to draw it separately. Where the drawings differ, the organization has not decided, and no website can display a decision that has not been made.

PRECONDITION C · CLARIFY WHO DOES WHAT

One name beside every step

A step with two names is an overlap.
A step with no name is a gap.

In the Tavares case, three entities claimed the newcomer’s first step. None claimed the follow-up.

Entity	Its one-sentence role
Foundation	Funds and reports on humanitarian work
Publisher	Sells books; points every reader to the introductory session
Teaching org.	Owns the newcomer’s first step and the follow-up
Events company	Runs gatherings; hands every attendee back within a week

PRECONDITION D · CHECK THAT THE PROMISE HOLDS

Marketing multiplies whatever is there

Ask ten people one question

“What, if anything, is different for you?” Do not suggest answers.

Listen for the concrete

“I argue less with my son” is concrete. “It changed my life” is not.

Include those who left

Three or four of them tell you more than twenty testimonials.

If the promise holds, more people benefit. If it does not, more people find out.

WORKSHOP · 40 MINUTES, IN TEAMS

Map your partner’s journey and find its constraint

Min.	Step
8	Each member draws the journey alone, from a newcomer’s first contact to regular participation
5	Compare the drawings. Circle every place they differ
12	Walk the real path online from the busiest entry point. Follow links exactly as offered. Mark entry points, gaps and overlaps
5	Write one responsible entity beside each step
10	Name a provisional constraint, the evidence for it, and the evidence still missing

Week 2 · Teams without a partner yet: use the Tavares organizations, Appendix M

ASSIGNMENT 1 · DUE WEEK 4 · 10% OF THE GRADE

The diagnosis memo

What it contains

- The four preconditions, checked
- The main constraint, named, with evidence
- A one-page journey map with the leaks marked

How it is judged

- 1,500 words, findings first
- Written for the partner as first reader
- Rubric: evidence, right rung, fidelity, usability

The test: no spending is recommended until the constraint is known.

TEAM WORK · 40 MINUTES

Leave today with a plan for the evidence

Due today

- The partner agreement, signed
- Or a confirmed fallback case

Ask your partner for

- Basic analytics and any cumulative figures it quotes
- A conversation with whoever answers incoming messages
- Records that show who returned after a first contact

BEFORE WEEK 3 · OUTCOME FIRST; EARN IT; LISTEN BEFORE DEFINING THE PROMISE

For next week

Read

Marketing a Message in the Age of AI, Chapters 4–6

Christiano & Neimand (2018), “The science of what makes people care,” Stanford Social Innovation Review

Write (300 words)

In one sentence, what change in a person’s life does your partner exist to bring about? What would you count to know it happened?

Do

Send your partner the evidence requests. Start drafting Assignment 1.