

# REvolution

## Building trust with sales and marketing one marble at a time

**Featuring Jackie Yeaney**

**Episode 101**

Episode music: Get ready for the REvolution. It's coming to you now. It's coming to you now.

**Jackie:** You know, we've landed in a, in a world where with marketing – it doesn't matter how much money you spend. It's much more about understanding who you serve better than anyone else, and being as relevant and helpful to them as you possibly can, and then they give it back. And people can't copy that. It actually becomes a sustainable advantage.

**Mary:** Welcome to REvolution, where we dive into what gets in the way of growth for B2B revenue teams across sales, marketing, customer success, and beyond. I'm Mary Blanks...

**Alex:** ...and I'm Alex Krawchick. For decades, we've been talking about how revenue teams can work better, together. On this show, we talk about the opportunities remaining for teams to better align, evolve their approach, and reach new heights of growth both professionally and personally.

**Mary:** Today, we're talking with Jackie Yeaney. She's a woman I respect for both her business leadership and who she is as a person. I had an opportunity to work with her when she led marketing at Red Hat. She's also spent time at Boston Consulting Group, Delta, Ellucian, and Tableau to name a few. During the show, we'll talk more about this and about her time in the U.S. Air Force.

**Alex:** Thanks for joining us today, Jackie, we're excited to dig into all of your experiences as a marketing leader.

**Jackie:** Thank you for having me, Mary and Alex. I'm really happy to be here. So I call myself an accidental marketer, but it's been over 20 years now, so it is, it is my thing. I started my career as an officer in the Air Force and then went to business school and then went to the Boston Consulting Group.

And I was, and I was a geek, a huge geek, electrical engineering degree. I did IT architectures a lot for BCG. I was consulting to Delta Airlines when 9/11 happened. And the CFO, of course pulled me aside and said, I know you love this airline, please come help. So, myself and two other people left BCG and agreed to go to Delta.

But the strange thing was the CFO then said, I would like you to run consumer marketing. So I kind of thought she'd lost her mind, I thought marketing was all fluff, but I was enamored with the Sky Miles program cause I'm like, that's a lot of data. So I, I agreed, got in there and, you know, found the passion of my life and my passion centered quite a bit on the customer experience.

So I realized everybody at Delta was busy trying to do their own thing to make things better, and nobody was really looking at what it was like to travel on Delta Airlines across the whole journey. And so I took, I think 80% of my communications money and put it into the experience itself, cuz in my head, being a non-marketer, I'm like, why am I marketing a crappy experience. Like, what am I, what am I doing?

And I found the power of brand, so I revitalized their brand, revitalized 70,000 employees and their energy and commitment to the airline, and so I've been doing it ever since. And actually, I'm quite proud of Delta because they've, they've kept that, customer focus, I think, ever since.

**Mary:** Yeah, I think that's definitely true, is a long time Delta flyer myself. I totally agree.

**Jackie:** Yeah, makes me proud. And I mean, and 9/11, who, I mean after then there's Covid, so maybe they found a situation that was harder. But of course I did find my way back to doing technology companies, you know, because I'm a tech person, so doing marketing for enterprise software ended up being my jam.

Alex: Jackie, I'm, I'm fascinated. Why the Air Force, what started you there?

Jackie: So my dad's career was the Air Force. So he was a civilian engineer for the Air Force. And you know, it's that conversation lots of families have, "Can't really afford the type of colleges you want to go to." And he said, "Well, you know, the Air Force has these scholarships." And I'm like, "Me?" This is the eighties.

And I was, I'm five feet tall still, but then I was only a hundred pounds. And I'm like, what are you talking about? But we ended up with the compromise of I would apply for the scholarship. If I got it, then we would talk about it. But once I got the scholarship, then the government wouldn't give any money to the school.

So it was like zero financial aid or full ride. So I took the full ride. I was very upset for a while. I did not like running with a bunch of men, being screamed at, doing pushups, ironing the uniform—didn't like any of it. But I, I, I ended up loving it, ultimately. Met my husband that way. Had the best job coming out of college. Learned a ton about, you know, leadership and, and being mission based and these sorts of things. So wouldn't change it, but—

Mary: I've heard you talk about the mission-based side of it before in some previous conversations,

Jackie: Mm-hmm.

Mary: ...and I'm curious, when you think about the mission and the relationships that you built along the way from a leadership perspective, can you talk about some of those mentors or leaders that have been instrumental for you throughout your career?

Jackie: Yeah, sure. And I, I think what I realized in the Air Force is that if you're all aligned around a common purpose, you know, then there's a lot of little details you don't have to figure out because everybody's kind of marching in the same—marching sounds funny with the military, but you know, I mean, going in the, in the same direction.

I've been really lucky on the mentor and sponsor side of things. So that CFO at Delta Airlines, definitely one of them. She fundamentally changed my life, getting me into marketing. She also got me involved in a nonprofit in Atlanta that became a big passion of mine.

And then my boss at Delta Airlines, the CMO, she's a best friend and mentor, and has, you know, been on that personal board of directors and believes I can do more than I, than I think I can. Um, and she has me involved in a wonderful nonprofit right now. So we get to work together there.

And then someone, you know, Jim Whitehurst, who was the CEO of Red Hat. And he and I worked together at BCG. He was one of the other people that left BCG at 9/11 to go to Delta. So we worked together at Delta, and then I was wise and followed him to Red Hat. He's probably the smartest person I've ever met in my entire life without an ounce of ego that goes with it.

He's always supported me. He's gotten me involved in a software spinoff of BCG right now, it's my husband's greatest fear in my quote "retirement" is that when Jim Whitehurst calls, I will, I will run. So hopefully he won't hear this because, it's kind of true.

**Mary:** That's awesome. So I appreciate all of that background.

I'm curious, you think about that and then from kind of that Red Hat perspective and other marketing careers and jobs that you've had in the past, are there things that stand out for you? I'm thinking back to that kind of mission-based side of it.

When you know the mission, it reminds me a lot about having the context to know the job that you need to do each day to show up and, and really know what you need to do to contribute to that broader mission.

How do you think about that from your own leadership style and bringing that mission base forward and creating that context and clarity within the team to operate?

**Jackie:** Yeah. So first I guess I'd say, I realized about myself that I absolutely have to work for an organization where I believe in their mission. There was one time in my career I took a job

more because I needed to stay in Atlanta for the kids, and I'm like, "Okay, it's fine. I can do the job," but I don't know, I, I think you need to have more than I can do the job to, you know, to really give it, 150% or, or whatever.

But I think because I have that mindset, and because I also believe that as a marketer, I could never possibly get a brand strategy right, or a marketing strategy right if we didn't understand the mission of the company, the vision of the company, our purpose. And again, I, I learned that some of that at Delta, so a lot of that was uncovering kind of the way back when, what was the purpose of Delta Airlines with its southern hospitality?

At the time, I think we called it a master idea, but it really was what's the, what's the purpose of, of Delta? And I have found that if you put the energy into that, again, you can get thousands and thousands of people aligned and then you don't have to tell them what to do every day, because they have the North Star.

I guess it's the North Star. And if you just think about your own personal life, like North Stars are important, otherwise, you know, why am I doing this? Why am I taking that path? And so I, I do try to put a lot of the energy and, and believe it's my role to help create that North Star.

**Alex:** I'm curious, Jackie, coming back to the mentorship things and, and maybe think of it when you're talking about North Star, did you deliberately go out and, and search for those mentors? Did they come sort of organically? And, I did read some things up on you. It looks like a lot of your mentors were people with whom either you had a business relationship, working relationship. Did you ever explore mentors that might be more peers, maybe outside the environment where you're currently working? So if you could just talk a little bit about how you chose your mentors, that would be awesome.

**Jackie:** Funny you say that. Just yesterday I was on a call with the Women Corporate Directors group, and we were talking about mentoring and formal programs versus informal programs. Whether I was a mentor or a mentee, I have not found formal programs to be very productive or effective, and I think it's because they just do these kind of random matches and you don't have a relationship that's being formed. And I get, I personally get frustrated when people, I don't know, come to me and say, "Will you be my mentor?" It's like, I don't even know you.

So yes, all of mine grew organically. And I think as being like true mentors, their mentoring really, helped me more after we weren't working together necessarily and just retained those relationships. I have never once asked these people if they would be my mentor, but I promise you, all of me, all of mine would say, "I'm Jackie's mentor."

Alex: Hmm.

Jackie: I find power in that. Now if, especially if you're on the mentee side, I, I think you do want to be intentional about it in the sense of who's around me? Because it, yeah, it can be, certainly can be peers. I tend- I have tended to use peers more as accountability partners than mentors. Like, you know, keep me honest, call me on things, those sorts of things. So what is a leader that I respect and look up to, and then reach out, have a coffee, you know what I mean? Like, try to try to actually start to create that relationship, to help get it to happen.

Alex: Yeah, it's fascinating. I'm hoping one of the positive things that certainly has come out of the pandemic is there'll be more opportunity to, you know, not only reach across different companies, reach across continents, have different sort of mentorship experiences for a lot of us.

Jackie: Yeah, the, yeah, so the, the across the world and doing some of it virtually—I still like to do some of it. But, and being able to, like, I feel like right now I can talk to a lot more people, you know, like I had three, I don't know if you want to call it coaching or mentoring calls yesterday, but it was just relatively easy. You know, where in the past it would've been like, when can you have lunch? And it would've taken a month and a half.

Alex: And instead go grab coffee with them in retirement when you're traveling, that's all.

Jackie: That's right, that's right.

Alex: Yes.

Mary: So another thing that you've talked about before is marketing being this aggregator across the business in some ways, where you have to sit at this intersection of mission and

values and product and almost operationalizing the whole customer experience and how that comes together.

**Jackie:** Mm-hmm.

**Mary:** You, you mentioned North Stars as well, and here it Klearly, we've been talking a lot about our North Star being revenue creation being a team sport where, you know, product and marketing and customer success and sales all work together to deliver an outstanding customer experience that ultimately grows revenue, whether it's net new or retaining and expanding the relationship with current customers.

Can you talk a little bit about your experience in the past and how hard it is to see revenue as a team sport? Have you ever found it to be easy?

**Jackie:** [Laughs] I don't know if I've ever found it to be easy. You know, and why, and why doesn't that happen? I don't, you know, egos. People have their expertise. It's hard for people to have this mindset of, yeah, it takes time and energy with these, relationships and getting alignment and all working towards it together.

I will say there's one experience that stands out in my mind, and it was at the company Ellucian, they do higher ed tech. The sales leader and I had an amazing relationship and there was such power in it, such power. And the power was we that—because I know you all think a lot about, you know, attribution and contribution and, you know, marketing source or say looking backwards, not forwards and being predictive—he and I agreed to never walk in the boardroom with two presentations. We went in together with the go-to-market and the pipeline, and did not do a lot of talk about what was marketing-sourced versus not.

We launched ABM together. I remember when we met with agencies, they're like, this is the sales leader right here? I'm like, “That's the sales leader. We're gonna do this together.” Because especially in B2B, it's all this complicated interaction that's marketing and sales and the product and, and customer support. It's all happening back and forth. And I remember in past lives saying, “Do you really think that webinar created that lead? Really?”

There's probably, you know, I think, I think the, it was Gartner, say at least seven interactions that happen before you even have a chance. And part of my job is marketing is to kind of have that mental availability so that, a lead can be created. So that worked out great, and then the other wonderful thing that happened with the teams, where the teams knew we got along really well.

And we, and Dan and I never hesitated to pick up the phone and call each other. So you all try to figure out your stuff because you probably don't want it to come to the two of us. We'll solve it pretty quickly.

**Alex:** That's awesome. I mean, so, so what was the impetus? I mean, was it personality? You all just clicked, was it, you know, you know, had you joined the organization after him, like, if you could talk about the dynamics there, because this is such a critical topic. People talk about this alignment so often, and, and, and Mary and I and team are really trying to unpack, you know, what are the things that are facilitating this true alignment.

**Jackie:** Mm-hmm. Well, fortunately or unfortunately, I think a lot of it is human and personality based. So he and I have the military background in common, and so that leads to that mission aspect. So both of us were all about better enabling higher ed institutions, period. And we had a lot of trust and respect for each other, like kind of straight away. And this is one of the things I wish, and maybe we can help others with this. So, and I think it's Brené Brown's concept, but you know, she talks about trust and it's a jar full of marbles.

**Mary:** Yes.

**Jackie:** And Mary knows this about me, but I tend, and I wish more people would. I, Alex, I just met you. I'm gonna give you my full jar of marbles. And you know, if you break it and marbles start falling out, you know that's kind of on you.

But I'm not giving you an empty jar and expecting you, you know, over a year, two years to be putting marble by marble in. Because if you can start with a place of trust, and people have good intentions and we're all trying to do the right thing, then you can kind of take it, take it from there.

I do have a problem where Alex, if you break my trust, I kind of dump it on the floor, all of it. So I'm working on that. So I'm working that when it happens, I just do take a couple out, because that's, that's not healthy, but—

Alex: I just, I don't use metal—I didn't use glass jars.

Jackie: What do you use?

Alex: I use plastic.

Jackie: [Laughs] So there's no breaking?

Alex: So, so yeah, but, but I mean, yeah, exactly. No, but seriously, Jackie, I mean, that's one of our core values that the company is trust. I mean, everything else, and you know, we, we, we have candid conversations. Mary and I were just having candid conversations yesterday with our LT talking through some things. And, you know, I'm very grateful for the trust that I've been able to build with my colleagues, personal friends, you know, spouse, partner, like everything throughout life, because trust is everything.

Jackie: I agree.

Alex: I, I completely agree. So it was that, it was really that trust. And then just to click a little bit deeper into that. What was it like? You all had that amazing sort of organic trust right off the bat, and then was it this explicit conversation like, let's really make sales and marketing one?

Jackie: Yes. And, and it was through the, the pipeline and this marketing sourced and attribution issue, if you will, and us talking very explicitly like we're ha- it's, it's the complicated back and forth, and there should be a sales interaction. And then probably the next, next best action is marketing. I think we were helped a little bit by the market we were serving, so we're serving higher ed institutions.

So we were in other countries, but let's just say in the US yeah, there's 4,000 of them. So this is a complex account based sales and marketing exercise. Why on earth would we talk about it

separately? And if I'm being honest, we also, we were PE owned. PE doesn't necessarily understand brand and customer experience.

So I went to him again, on the trust level, be like, why am I continuing to show up to talk to them about it? Because they just care about the, the numbers. And you know, that's okay. Then, you know, then you and I just go together and we concentrate more on the numbers with you.

**Mary:** Mm-hmm. So were the metrics and the numbers shared accountability across sales and marketing, using the same metrics?

**Jackie:** Yes, that's right. Loved it.

**Mary:** Yeah. That's awesome. It's certainly much easier than having to explain why marketing is showing up, talking about marketing sourced and touched, and it doesn't match what sales is seeing somewhere else.

**Jackie:** If I have to summarize my frustration in that regard, it's that almost all of that is just what you said: to prove marketing's existence, not to actually help marketing get better, or be more relevant, or create more opportunities, or create a better customer experience. And so I feel like it's a lot of wasted energy, and you all know, it's not even close to right.

So all these marketing teams and leaders are trying to prove, prove they should be there and they should, they should get budget. And whatever they're showing up with is, I don't wanna say crap, but it's usually close to crap.

**Alex:** Yeah, it's still a lot of guesswork. I mean, that's that—

**Jackie:** I mean, everybody's doing their best, but how do you...

**Alex:** Absolutely. Absolutely. And, and I think one of the things that was most difficult for me, and, and, and this is actually I want to, I'm dying to ask you about Tableau as well, in terms of being authentic, because here you are, a data analytics company. We all work so hard to

create our data and yet we don't really have it coming out on the other end to help us make decisions.

And I'm curious if you could talk about, you know, when you arrived at Tableau and you know, just some of that experience of, okay, we have to practice what we're preaching here.

**Jackie:** Yeah. So, luckily, I mean, Tableau of course has a data culture. You can, you can imagine. But yes, some of the, kind of how we tie it all together and such was difficult, and I'm not gonna say I found any sort of holy grail on what we were just talking about, but I didn't have the, the core problem we're talking about, of justifying my existence by, in making up fake—I'm being a little extreme, I don't mean to be.

But, so there wasn't energy put into that. It was more the struggle of what should we track? And what should we carry up, you know, to the executive team at Tableau? And then of course Salesforce bought Tableau up into Salesforce and underneath.

So there's this, the funny thing that happens at Tableau, you can imagine because we very much believe everybody's analyzing data, so, so everybody's got—

**Alex:** I just want to see your dashboards.

**Jackie:** [Laughs] No, they're fun. They're fun actually. I have, and I have a lot of fun helping marketing teams because of course, you know, we have a lot of examples that people can then go, then go use.

But, my—it was my marketing operations leader that was in charge of analytics for our team. So he and his team put a lot of effort into what are we bubbling up that Jackie and the marketing leadership team are looking at every day versus what are people doing on their own. And we did pretty well at that, but, but it was, but it was a lot of energy. Because otherwise it becomes very messy.

**Mary:** Yeah, it can become a full-time job to just manage to the data—

**Jackie:** Yes. And we had that, we, we had multiple people doing that, just that. I wouldn't undo that, but, and maybe, you know, someday we won't need that. And Klearly can maybe help but...

**Mary:** How do you see CS, or customer success fitting into this, I feel like a lot of people are starting to call the alignment between sales and marketing, the broader kind of GTM or go-to-market motion? I think with, with product led growth and other things, we're seeing CS play in a bigger and bigger role, and, but yet it still feels like a little bit later to the whole sales and marketing alignment story.

**Jackie:** Yeah, I agree. And if you think about it, most organizations, they structure it all very differently. You know, there's, there's customer success groups, there's customer experience. Where's the product come in? And who's reporting to who?

**Alex:** Yeah, just, just recently I've seen CS teams. I've spoken with a number of people, Jackie, where CS is reporting under the Sales P& L, which I find fascinating.

**Jackie:** And I think, yeah, that seems to be a relatively new trend that I'm not sure I like. And part of the, let me see if I can, simply articulate why I think that. And I can go to sales and marketing. So all this we're talking about sales and marketing and alignment and, and trust and working together, but let's be real—there is healthy tension that should exist between sales and marketing.

**Mary:** Hmm.

**Jackie:** And I think it is a fundamental mistake, and I have coached many new CMOs to not take the job if they're gonna put marketing under sales, because you will turn into sales support.

Again, human nature. [Laughs]

You, you, you need to have them sitting side by side. And especially with tech companies that people argue with me, well, we're, you know, we're only a hundred million, so we don't need it side by side. [Laughs] I disagree. I completely disagree.

So mentally for me it's that same argument with customer success. If you have it reporting to sales, then you're gonna be too sales led, too quarter led, too in the moment. And both on the marketing and CS side, you kind of learn, you lose the long term, a lot of the strategic efforts to make the customer successful. And again, just like with marketing, there's a lot of investment in customer success that you can't tie directly to the next new dollar. It's a short term, decision that I think will ultimately bite people.

**Alex:** So what is the ultimate organizational structure?

**Jackie:** Oh, I don't know if I have that answer, but I would, obviously—a head of sales and a, and a head of marketing. I would call it the head of customer experience and make it success, the experience itself, and support.

**Mary:** I think one of the interesting things that someone said to me just this week in terms of how those teams kind of tie together and thinking about that customer experience is sales should be focused on those one-to-one relationships and transactions and messages. Marketing should be one-to-many and CS is more of this one-to-few element, especially, you know, once they become a customer and you're working maybe in like later stage funnel as well. Does that resonate with you in terms of thinking about how to divide?

**Jackie:** No. [Laughs] Because again, if you, in B2B, like I, I want us to think about these, prospects and customers almost like they are human. And so if you start completely divvying up, I'm doing this so you know, only one-to-one, and I'm blasting out the one-to-many. Now you're really pick picking lanes. I'm not sure that's where we should be heading.

**Mary:** Yeah, it seems like that could potentially be hard to architect without a single kind of source of what's going on and understanding who is doing what and at what point to make that a great customer experience—

**Jackie:** Exactly. Yeah. Yeah.

**Mary:** ...for each individual who's going through it. To your point, it's not like an account is moving through together, and you can't...

Jackie: Yeah.

Mary: ... think about the individuals within that account.

Jackie: Mm-hmm.

Mary: It's a very nuanced journey.

Jackie: Yeah.

Alex: What do you think really prevents the, you know, revenue teams from being a team sport? Like what out there, so personally, for example, I think obviously about data, but then you brought up a really interesting point where it was this organic personal connection. Like I, I often think about, let's just not think about the obvious things. Let's think about the non-obvious things in terms of really helping teams align. Because there, it let's not kid ourselves, like this alignment that we talk about is not trivial.

Jackie: No, no, it's not. I, I do think a lot of it comes by misaligned incentives...

Alex: Hmm.

Jackie: ...and how people get paid. That's the literal aspect, but it's also how they quote, get promoted and succeed. And so people, even if they don't say it out loud, that's what they're chasing. And I mean, do you know—there is no sales leader out there that gets paid the same way as CS or marketing leader does. I think that's a problem.

Alex: Yeah, we, we just heard of some interesting, I won't name any specifics, but Mary and I were talking recently about some where a sales team is not being compensated based on closed deals. They're just getting an average, you know, base salary. And I'm still unpacking that. There's a lot of cognitive load there for me.

Jackie: Yeah, yeah.

Alex: But I, I agree. I, I will share with you at one point I was trying to change the compensation for my demand team, where it was getting more aligned with sales numbers, if

you will, more pipeline closed business numbers. And that was for a small company, and that was herculean. So it's not easy—

**Jackie:** As they say, I don't have impact. It's like, well, we need to create that impact.

**Alex:** ...right and tracking it. That's why it comes back to the data, like being able to—well the CFO of course wants to know, well, okay, how are you gonna track that information? So our compensation, then it became an HR issue. You know, we can't mess up someone's compensation. We need to make sure. Sales, I feel like we've trampled the grass enough where we can appropriately compensate sales.

I think the other functional areas, and again, I'm intrigued by CS now rolling up under sales. The complexity of that is very interesting to me from a, from a reward structure to your point. Not just, not just financial compensation, but also career development.

**Jackie:** Career development, and whether we wanna admit it or not, I know CEOs and COOs kind of land in a different category. But sales leaders tend to have certain kind of strengths. CS leaders have certain kind of strengths. Marketing leaders have certain kind of strengths. And then to just assume that one can—don't ever ask me to run sales, I would be terrible. Just, I think, assuming it can all be one, one leader, I think is gonna mute the power you can get from the other functions.

**Mary:** So if we could wave a magic wand, maybe not in terms of organizational design, if we were doing a go-to-market motion where the customers kind of in at the center, from a compensation side, are we saying that sales would be compensated somewhat traditionally? But like marketing and CS could have piece of that pie?

**Jackie:** Yeah. At least let's say, yeah, half of how marketing and CS gets compensated is tied to pipeline and closed deals.

**Mary:** I'm here for that, by the way. That's going to be a great day.

**Jackie:** Yeah. I mean, why, it's like, why are we all in this business? Right?

Alex: Yeah.

Jackie: But I would also say, I think everybody's compensation that needs to, and again, another hard thing to track, but, some sort of customer engagement measure. I think the days of NPS are kind of done, but yeah. There was one company I worked at, quite a while ago, where the CEO fundamentally believed that the customer experience drove the, the business, and we were all compensated on it. And it was magic, magic.

Mary: That's awesome. I bet the customer feedback had to be amazing.

Jackie: Yeah. No, it was, yeah, it was amazing. And, and, and people jumped through hoops, you know, to make sure the experience was great.

Mary: Right.

Alex: You're, you're, you're absolutely right, Jackie. I remember, some of my favorite books, I'm a bit of a of, well, when I, I don't have so much time anymore, but when I had more time, to read, there was, I'll never forget this case study. There were two University of Michigan Ross's Business School professors that were all—they were focused specifically on customer service.

They did a series of books, and forgive me, I'm escaping the name. Maybe we'll put it in the show notes. they did a study talking about Saturn. Remember Saturn cars?

Jackie: Yeah, yeah, yeah.

Alex: No disrespect to the manufacturers, the engineers at Saturn, but the point of the case study was people bought Saturn for the experience and the community, not the car. And yes, it had dent-free like panels. It was fiber glass. Yes. But at the end of the day, people were buying, like they did this research and the car could break down often, and if they had a great customer experience, it had kept coming back and buying more Saturns.

Jackie: Yes, I do remember that. Yeah. You know, in Tableau it's a little bit different, but some somewhat similar, the user-based community is amazing. And they're our biggest brand

advocates, they do in a sense—do a lot of my marketing for me, both externally in the market and internally in their organizations.

And we obsess about elevating their voices and elevate and helping them with their careers and making sure what they want in the product gets put in. But to your point, they will forgive us when things go awry. Now you can't do that too much because then you start... [Laughs] For 100 positive, you've got—

**Alex:** Well, eroding trust. It comes, it comes back to trust, right? I mean, and, and through community you can do that. I think that's wonderful. And you've had a pattern of doing that throughout your career. Red Hat, Tableau—

**Jackie:** Yeah, I love it.

**Alex:** ...like it really is about community for you.

**Jackie:** It is, it is. Some of it is, I think, you know, we've landed in a, in a world where with marketing – it doesn't matter how much money you spend. It's much more about understanding who you serve better than anyone else, and being as relevant and helpful to them as you possibly can, and then they give it back. And people can't copy that. It actually becomes a sustainable advantage.

And if you ask almost anybody at Tableau, they would say the community is our magical asset, our most unique asset, our biggest differentiator for the business.

**Alex:** Yeah. And, and seriously defensible, right?

**Jackie:** It's defensible.

**Alex:** It's a moat. Yeah.

**Jackie:** And do you think I can track any of that to revenue directly? No. [Laughs] No. It wasn't that it was maybe six months before I left, but the team came up with this idea about, you know, if you think about the, this data and, how a flywheel of Tableau might happen, well,

people need to be data literate. And there's still a lot of business people that are not, let alone the, you know, out there in the communities.

And so it's like, well, what if we did a pledge to enable 10 million people and paid the, did the, you know, the resources and the money and programs to do that? And I came up with this, you know, pitch and I'm going into the executive team. It took me five minutes. And the CEO and everybody else is like, "Absolutely, for sure, that's what we should do because it's the right thing to do. And yes, we believe ultimately it'll benefit Tableau's business."

**Mary:** That's awesome.

**Jackie:** That's great. [Laughs]

**Mary:** Mm-hmm. I feel like to do that, and a lot of times, especially from a marketing perspective, you mentioned not being able to measure some of that work, and I feel like a lot of times we feel like we have to be so analytical in the decision making around that, whereas just know in your heart that's the right thing to do, right? And you can take that creative approach to getting there.

**Jackie:** Well, as an engineer and an analytical person, that took me a while to figure out. I, for years and years believed, yeah, the data and the analysis will, will show the way period. You know, but then I did take a, a, a few flyers on, on some ideas and started to, to realize that if you just let the data point the way, then we're not good marketers, and you can't find the surprising insight or connection point that will really resonate with people.

**Mary:** Yeah, I totally agree. So when you think about marketers and the skills to kind of get there, what—or maybe not even skills, like what advice would you give to marketers to lean into that more and to kind of trust your gut and build out some of your own self-confidence and leaning into all of that experience that you have?

**Jackie:** Yeah. I mean, I'm a big fan now of just, you know, trying things. Like not all of, like even say if I'm, if I'm an individual marketing person, you know, 20% of my time and energy or something, and as a, as a larger team, somewhere between 10 and 20% where you're just

trying things. And so I'm a fan of pulling people together and doing little hackathons to get, to get new ideas.

You know, why not use the, the software developer ideas of how they do things to help marketers' kind of get out of their own way? So as an individual, I'd say don't, don't be scared to, depending on what kind of culture you're in, but bring up the crazy idea and say, let me just try it. Let me try it with half my time. Let me try it for three months, and see where that might go.

**Mary:** Yeah, I feel like B2B has a reputation of needing to be boring in some ways, or you feel like you can't take those risks, and—

**Jackie:** That's a fair point. Yeah. That's another thing I loved about Red Hat and Tableau is we, we didn't have that mindset, and again, back to like a, a differentiator, sustainability, when you are kind of, when you stand out in a different way and have a personality, and I do, we forget that we're selling to humans? [Laughs] Right?

They're, you know, they're not gonna remember if you're just being the, the stodgy messaging, and the same messaging and, not have a personality with it. So I do—there was one, little, video and we did at Tableau and it was pretty corny. And my husband's like, you let them do that? I'm like, “Yeah, I let them do that. It was fun.”

**Alex:** We, we just did some interesting stuff like that. Very vulnerable stuff as our own outreach, a little bit of our own stuff at Klearly this week, and it'll be, it'll, it's out there in the, in the, in the ether now, but yes. Being vulnerable and, uh—

**Jackie:** And realizing when you are kind of out there on the edge a little bit with your message and personality, as some people are gonna love it and some are gonna hate it.

**Mary:** Mm-hmm.

**Jackie:** The worst thing we can do as marketers be like, “Yeah, that's okay.”

**Mary:** Mm-hmm. Exactly

Jackie: Nobody's gonna remember that.

Alex: Well it's, you know, it's, I know, you know, the, the Maya Angelou quote, right?

Jackie: Oh, it's my favorite. [Laughs]

Alex: So it's not what you do. Yeah. It's how, how people make you feel, how you feel at the end. And, uh—

Jackie: Half my retirement gifts have the quote on it, because people know that's my thing.

Alex: Is that right? Wow. Okay.

Jackie: Well, it also that quote, not only for the reasons you just said, but it also was a big de-stressor for me. You know, as far as like, giving speeches on a big stage, and it's like, just be myself. They're gonna remember how I made them feel. They're not gonna like torture, you know, me about saying some little thing wrong or something, you know?

Alex: Well, the attorneys will, but the audience won't.

Jackie: Yeah. [Laughs]

Mary: [Laughs]

Alex: You know, I, I think one thing, Jackie, that maybe... I think marketing leaders, boy oh boy, there's such a—I've been reading so much recently about the horizontal nature of CMOs.

Jackie: Yeah. Yeah. Yeah.

Alex: Now how I, I think I even read—Mary, I think we, you and I were talking about it recently about what, what did the Chief Connection Officers now,

Mary: Yeah.

**Alex:** How, how, if, if you were to go back into a role like that—I mean, how do you prioritize your time and, and your responsibilities and your efforts knowing the marketing function is now spread so horizontally throughout the organization?

**Jackie:** Yeah, that's a really good question. And the, the first part of what you said kind of reminds me, I, one piece of advice I often give to CMOs is like, don't worry about quote, “staying in your lane.” it's because of that horizontal nature, and maybe it is the customer experience that needs, you know, help desperately, maybe it is the strategy of the company. Maybe it is sales support. It can be lots of different things and marketers are like, “But I'm only supposed to be...” you know, don't, don't do that.

So how I prioritize my time in that sense is I do, and I do this in all in executive team, you know, leadership discussions, I take off my marketing hat in a sense, and really try to think, what does the business need? What does the customer need? Then I try to put my focus there. So I try to think about the, the organization, not my function or even what other people might expect from me.

And sometimes, like I'll say at Red Hat, a lot of my energy, as Mary might remember was, you know, we needed to be known for more than Linux, and we wanted to be kind of the enterprise open-source software company. And that was a, that was probably a five-year journey. And, but I knew it was critical. But my, my peers didn't really care that much about the energy I was putting into that cause it wasn't necessarily helping the quarter.

So I just kept at it and I would not take it off my strategic plate, if you will, as far as, some of my initiatives and what I did, but I just, I didn't brag about it or talk about it that much. And then, yeah, one day I think everybody did turn around and say, oh, we are that, and IBM's gonna pay a lot for it.

**Mary:** Mm-hmm.

**Alex:** Did you, did, did you have that trust with your colleagues at that point? Like, how new into your tenure were you? Did you establish, have to establish that trust and credibility before you went down that path?

**Jackie:** Yes, I was blessed at Red Hat in the sense that I consulted to them for. A bit less than a year, but more than six months, I can't remember exactly. And started to build that trust before I ever kind of walked in the door. And they probably, they weren't thrilled, you know, to see a person that didn't have the open-source background... [laughs]

**Mary:** [Laughs]

**Jackie:** ...come in and lead marketing. So it did take me, take me some time. I didn't ask permission, per se, on some of that stuff, but I made sure, you know, the other half of my energy was making sure I was doing the things that helped them be successful. That's something I've always done with my peers. Like, what, what, what are they trying to do?

I know I said we all have to have the organizational alignment, but that doesn't, you know, there's still the sales leaders trying to get “x” done. What can I do to help, him or her get that done? And whether it's something as that's in my mind or not, doesn't, doesn't matter necessarily.

**Mary:** Mm-hmm. I do find it interesting in all of that it feels like marketing has to be focused on both the short term, in order to have that alignment with sales, to think about this quarter and the next quarter, and making sure that pipeline is where it needs to be. But you also have to be very focused from a marketing side on the long term.

**Jackie:** Yes.

**Mary:** And sometimes I feel like the long-term people see as like, well, that's just the marketing fluff the future

**Jackie:** Yes, yes.

**Mary:** ...but if you're not focused on both, then...

**Jackie:** Then you're actually not doing your job. I heard this quote the other day from, was it James Burrows, the Cheers guy, and he's like, I'd, you know, rather be fired for doing my job

versus not. So if you're not doing that, I think you're not doing your job. And the reason I say that, so yes.

So this is another one of the 50/50 mindset things from, Yeah, 50% of marketing's role is the more near term and helping to get business in the door. But the other half is obsessing about the long-term health of the company. And one of the things I tell my team and my peers, if we aren't doing that in with an organization, who else, what are their functions doing that?

Nobody. Nobody. So we have to, we can't not do it. So we have to obsess about the long-term health and sustainability of the business. And yeah, those are a lot, those are a lot of those activities and, and energy that we can't make the direct attribution today.

Mary: Mm-hmm.

Alex: Yeah. We, we, I tend to think of it as glue, right? Marketing a lot of times is the glue of the organization and having to pull all the other teams in. And, that's why I say it's horizontal. It's a very, very, I, I would say, I mean, it's the most difficult functional area to lead today in a B2B business, by far.

Jackie: Oh, yeah.

Alex: And that's also why you see—

Jackie: I've had many an executive coach like, "What are you doing? You could do other things."

Mary: [Laughs]

Jackie: I'm like, "Well, I do love it in a sense, and I do think it's really important."

Alex: Well, thank you for that. And speaking of which, that was one of my next questions. What's next for you? What's, what's exciting you right now?

**Jackie:** Yeah, so I'm still working that through, so I'm about three months into it and I don't, I don't wanna call it retirement. To me, it just means I'm paying my own health insurance.  
[Laughs]

**Mary:** [Laughs]

**Jackie:** So, I'm on two public boards, which are taking, it's a whole, would be a whole other podcast. It is taking a lot of my time and energy right now. You know, it's supposed to be the nirvana of where we're all aiming for, but, it, it can be a lot of work with the market the way, the way it is right now. Um, and that's Avaya and Talk Space.

And then I'm executive coach for a few people. So I was a little stressed about that cause I'm like, "I don't really have a program. What do I charge?" I'm figuring, figuring that out. But so far so good on that.

I'm an advisor to a software company in Australia that's focused on DEI and really helping people, helping organizations understand whether people are feeling like they can be themselves or not, rather than just, you know, the standard little survey that asks, "Do you feel engaged?" So that's fun.

I may do that software startup spinoff from BCG that Jim Whitehurst, sent me—sent me on. So, and then I have an RV, so I'm supposed to be taking that out and about. That hasn't quite happened yet because I've been seeing a lot of friends and family for the summer. So, and then my husband has a little business that, I told him I would help him market, but I haven't gotten on that yet, so it's called Blind Ambition Fitness. So I will help him do that.

**Alex:** Thank you, Jackie, and thank you for listening. If you like this show, be sure to follow so you don't miss an episode.

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Alex: Next week, our journey towards the B2B REvolution will continue with another great guest. Until then, I'm Alex Krawchick...

Mary: ...and I'm Mary Blanks. We'll talk to you next week.