2007 AMA Nonprofit Marketing Conference: Overview

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EXECUTIVE SUMMARY

Attendees of the 2007 AMA Nonprofit Marketing Conference were presented with an impressive line-up of nonprofit marketing professionals and experts to focus on the theme of “Transforming Your Organization Through Marketing.” The conference opened with the proposition that all nonprofit marketers are in the business of changing behavior. The theme of change was carried through to exhibit that internal (organizational) changes are sometimes necessary to support the goal of changing the external environment. The presenters gave tangible evidence of successes (and some failures) that highlighted the importance of understanding the critical role that marketing plays in the nonprofit sector.

To illustrate how organizations enable behavior change, the conference program was designed around a number of sub-themes, namely, the importance of aligning the marketing message with organizational programs; the value of publicity and media attention in cause marketing; and how nonprofit organizations of all sizes - large and small, driven by membership as well as funding – address these issues.
CONFERENCE OVERVIEW

Introduction

Over the last forty years, marketing has invaded the nonprofit world. Marketing has evolved from being a mere fundraising function to one that is closely linked with the success of the nonprofit organization in fulfilling its mission. As nonprofits began to incorporate private-sector thinking and practices like selling and distribution, and to partner with for-profit entities in order to leverage their resources and specific market knowledge to address social problems, the role of marketing within nonprofits grew in importance. According to Georgetown University professor of marketing, Alan Andreasen, the first evidence of the elevated stature of marketing in the nonprofit domain was the emergence of positions in organizations with a “Marketing” title.

Together with a growing acceptance of marketing within nonprofits, the role that nonprofits envision themselves as playing in society has also changed significantly. Evidence of this shift can be found in name changes of programs or organizations, such as, from “Center for Disease Control” to “Center for Health Marketing” or focus changes from organizing around a problem in society to getting people to do things, to buy things, to stop doing things, to help, or to give in order to fix a problem in society. Andreasen pointed out that while marketing, per se, aims at influencing behavior, the role of the nonprofit marketer is more demanding than that of the for-profit marketer. Many nonprofit marketers grapple with the same issues as do for-profit marketers with regard to selling services and products. However, these issues are confounded by the fact that nonprofits have various “customers,” namely donors, volunteers and end-users on whom the organization depends for its very existence. In many instances, though, nonprofits do
not have products or services at all, and are purely focused on changing behavior that may not provide a direct benefit to the “customer.”

The 2007 AMA Nonprofit Marketing Conference was structured around a central tenet, namely, enabling behavior change through marketing. The conference sought to address the challenges confronting nonprofit marketers through this central theme. Conference chair and executive director of the Children’s Brain Tumor Foundation, Joseph Fay, pointed out that “what entitles marketing to claim transformational status is that our business at its essence is to listen to the people who matter.” Accordingly, the sessions focused on helping marketers find out what the various “customers,” who sustain the nonprofit organization, want from the organization. Presenters also provided insight into how marketers should focus on the marketing effort, both internally and externally, so as to allow individuals to enact this behavior change.

To illustrate how organizations enable behavior change, the conference program was designed around a number of sub-themes, namely, the importance of aligning the marketing message with organizational programs; the value of publicity and media attention in cause marketing; and how nonprofit organizations of all sizes - large and small, driven by membership as well as funding – address these issues. While the following review of the conference proceedings will be structured under these headings, constant reference will be made to how the sub-themes provide insight into how marketers enable behavior change.
Changing Behavior

In his plenary, Alan Andreasen highlighted the challenge of “invisible marketing,” where customers are encouraged to take action with the result that nothing happens, for example, the customer does not get heart disease, or the benefits accrue to an anonymous or remote third party, or something is fixed that the customer did not break, or the problem takes many years (if not decades) of work and change to fix. Bill Toliver, executive director of The Matale Line, added another nonprofit marketing challenge: that of speaking not only for the organization, but for those who have no voice. Furthermore, as Andreasen pointed out, everything the nonprofit organization does is a matter of public scrutiny and open to criticism. But despite these challenges, social marketers persist, according to Toliver, as their job is one of moral obligation.

The speakers at the conference, particularly Andreasen, Toliver and William Smith (executive vice-president of the Academy of Educational Development), widely concurred that the primary role of social marketing is to change behavior, not just to execute a set of activities centered around ad spots and public relations. Andreasen called this the nonprofit’s “behavioral bottom line.” Toliver informed delegates that since only twenty-five percent of PR strategies succeed, the marketer’s job is more about getting people to commit to an organization or cause even when there is no crisis or disaster. Lynn Osmond, president & CEO of the Chicago Architecture Foundation, spoke of changing behavior as a nonprofit’s “return on investment” that measures the organization’s ability to achieve its mission and vision, a sentiment that was reinforced by Smith.
One of the key indicators of engagement and changed behavior is marketing measurement. Measurement metrics are available on all aspects of a marketing program – from the web (e.g. click-throughs, hits, new members, online donations, etc.) to traditional measures (e.g. number of columns, number of mentions) to the measurement of the nonprofit’s impact on society (as indicated by the number of times the nonprofit is asked to be the spokesperson on a particular issue or by the self-reported gain in knowledge or well-being of individuals pre- and post-engagement). William Novelli, CEO of the American Association of Retired Persons, insisted that the organization constantly monitor the “triple bottom line” for evidence of the difference it is making to society, and specifically its constituents. In order to improve marketing success, and to build credibility for marketing within organizations, it is necessary to review the organization’s impact regularly and make necessary changes as soon as areas of improvement are identified.

**Message and Program Delivery**

The main distinction between communications and marketing was highlighted in Andreasen and Smith’s presentations. They agreed that communications, although important, are one-way messages delivered by the organization about a problem. Toliver, explained that the average person receives approximately 1,000 disparate messages a day through television, radio, newspaper, email, the internet, etc.; of which only two are retained and only one in any positive sense. Therefore, relying on communications alone is not sufficient.

Marketing, on the other hand, is an interaction with an individual to actively address a problem. In order for an individual to respond to a problem, she or he needs to have motivation (the desire
to do it), the *opportunity* (available resources), AND the *ability* (the means) to enact change. Successful social marketing campaigns need to provide all of these. For example, if marketers are executing a campaign against childhood obesity, they need to concentrate on both, the upstream factors and causes (that is, parents, fast-food restaurants, video game manufacturers, and policy-makers) as well as downstream resources available for addressing the problem itself.

Osmond echoed this in her organization’s ‘cradle-to-grave’ approach, by targeting education programs at youth, training children’s teachers, and developing girl-scout programs, and training and career-development opportunities for adult volunteers (all upstream factors in CAF’s case); and developing new programs for individuals to view, interact with, and appreciate Chicago’s architecture (downstream programs). Social marketing campaigns for causes that require high-involvement from individuals have to address the various stages of change. Such campaigns make individuals think about the problem (i.e. through communication of the message); get them to start doing something about the problem (i.e. provide programs in which to engage); and then get them to continue to address the problem in the long-term, either for their own health or the continued well-being of others (i.e. provide continuous support and engagement for individuals). Much of getting individuals to start doing something involves demonstrating that, through their actions, they are capable of making a difference to their own or others’ lives.

Smith gave many examples of how programs can and should be developed to enable behavior change, including North Carolina’s police campaign entitled “Click it or Ticket”, which demonstrated that visible messaging (television and radio) combined with enforcement programs were integral to a campaign’s success. In addition, he demonstrated how neglecting to ensure the
coordination of upstream and downstream factors, as in the Chesapeake Club crab campaign, result in good awareness but no behavior change, and therefore ultimately in marketing failure. One of the possible causes of such failure is developing messages and programs that answer the wrong questions. The example Smith gave involved the creation of messages and education programs to encourage Hispanic women to strap children into car seats when driving. It was only by re-looking at why car seats were not being used, that new programs (the blessing of car seats by priests) could be developed to achieve campaign success.

The synergy between message and program was reiterated by Todd Whitley, vice president: eMarketing at The Leukemia & Lymphoma Society. His presentation focused on how organizations improve effectiveness at achieving their goals of changing behavior by carefully crafting their online strategy. This strategy changes the purpose of a website from a reactive display of information to a proactive medium for enabling action. This shift to a proactive medium is primarily achieved through the website’s ability to bring all elements of the organization together synergistically, removing divisional silos to present a single view of the organization online through integrated cohesive programs for enabling change. Whitley’s position was reinforced by the presentations of Allyson Kapin, online manager of Campaign for Tobacco-Free Kids and partner at Rad Campaign; Dina Lewis, CAE and President of Distilled Logic, LLC; and Donna Wilkins, President of Charity Dynamics.

Understanding the audience

Part of the challenge in sending out the right message for the target audience and creating the types of programs to which these individuals are most likely to respond, involves understanding
the audience for whom such messages and programs are designed, and knowing the best way of finding out this information. This was echoed in Smith’s example of the car seat campaign. Without understanding the values, interests and motivations of the audience it becomes nearly impossible to create campaigns that can change behavior. Sheri Jacobs, managing director of McKinley Marketing, emphasized that understanding the audience, and its perceptions of the organization, was key to ensuring the success of a campaign.

Several ways exist of learning about the different types of audiences and their needs. One is to record feedback. By creating tools which enable individuals to respond with comments and suggestions and then by analyzing the responses, messages and programs can be tailored to selectively address only specific groups of individuals at a time. Other methods include: exit interviews for staff and volunteers which can provide valuable information to the organization about what it is doing right and wrong; customer and donor surveys; and observation of target audiences in their daily lives.

Toliver argued that while dividing customers into segments based on broad demographic factors is the convention, a more useful strategy is grouping customers together into communities around issues they think are important. In this way, instead of seeing a message being targeted at a group, we can think in terms of large responses being coordinated by a group. As Lewis pointed out, we are already seeing the power of this approach in the area of social networking.

According to Richard Fawal, vice president of OnPoint Advocacy, and Holly Pitt Young, vice president of Democracy, Data & Communications, understanding the audience enables the
organization to better engage individuals to speak on its behalf, and to cultivate advocates. This not only involves creating programs that enable individuals to engage with the organization in response to its messaging but also allows the nonprofit to gain valuable insights into the various degrees to which members are willing to engage or advocate on the organization’s behalf by creating activities in which members can participate or deselect themselves.

Jacobs stressed that it was important to understand how people’s needs were changing, and capture evidence of this in as many interactions between customers and the organization as possible. In this way, marketers could better tap in to how to coordinate people’s responses. Interactions such as customer feedback at events; short surveys (one or two questions) on the website; polling new members on why they joined; or one short question to individuals phoning in with an inquiry; could be invaluable sources of changing trends in emotions, interests, and perceptions.

Evidence of changing needs can be seen in the way audience members form online communities. Fawal, as well as the participants in the Web 2.0 session, namely, Eric Eckl, senior campaigns & marketing consultant at Beaconfire Consulting; David Patterson, director of new media at Heifer International; and Joshua Peck, internet director for The One Campaign, spoke of taking the organization online as a member of various social networks in order to ensure its presence and relevance as new forms of two-way group and one-on-one genuine interactions emerge and replace existing forms of communication. Katya Andresen, vice president of marketing at Network for Good; Arlin Wasserman, executive director for America on the Move Foundation; Jonathon D. Colman, senior manager and web evangelist, digital marketing
at The Nature Conservancy; and Matthew Degalan, senior vice president of MercyCorps; added that by understanding how constituents wanted to be engaged online opened new and personalized avenues for generating revenues, garnering support and inviting advocacy. And as Kapin pointed out, these avenues were even open to organizations which operated on a shoestring budget.

Partnerships

Another key aspect of message-program coordination is partnering with for-profit firms who can deliver specific programs that enable individuals to engage in behavior change. According to Whitley, it is important in instances of partnerships that the nonprofit ensure consistency of organizational message for joint programs. According to Casey Minix Bangall, responsible for strategic partner relations at the American Red Cross; and Laura Goodman, director of corporate marketing at Reading is Fundamental, it is essential that nonprofits take control of developing the marketing plan of joint campaigns for their for-profit partners if nonprofits are to achieve this consistency. Partnerships are most successful in creating programs to deliver social messages when partners actively and strategically support the organization’s mission and are themselves recognized as good corporate citizens.

One of the benefits of such partnerships for for-profits is their ability to better meet business objectives through addressing social objectives. According to Kristen Esposito of Macy’s, it is important for the corporate entity to find causes that resonate with its core customers and employees. Brenda Bax, director of Pets for People at Nestlé Purina Petcare Company, spoke
about the partnership between Nestlé and Variety resulting in higher pet food sales than other campaigns attempted by Nestlé for pure business purposes.

Branding

An important element in integrating an organization’s message and its programs is through branding. According to Jennie Winton, founding partner of Mission Minded, an organization’s brand is not its logo or even its mission. Rather, a brand is synonymous with “reputation” or what the organization stands for. This same message was echoed by Larry Checco, principal of Checco Communications who stated that your brand should be “your story, not your fairy tale.”

Joselyn Zivin, senior vice-president at Lipman Hearne, pointed out that a good brand model is foundational for an organization as it enables both strategic and marketing planning. A brand inspires feelings, emotions, and ideas and helps an organization clarify its own priorities and objectives vis-à-vis being all things to all people. Further, a brand model helps an organization to determine its competitive advantage in the sense that it forces the organization to seek what it is doing better compared to other organizations that have the same constituency. An example given of an organization that successfully repositioned its brand image was that of the Lions Club International.

Several speakers addressed the challenges in branding organizations that have chapters or offices spread across a geographic region. Kurt Aschermann, the former chief marketing and development officer of Boys & Girls Clubs of America, found a great amount of disparity in how the brand was represented by the different club locations. The national office had to
demonstrate the value of a consistent and coordinated image to each of the clubs. Through training, providing resources and treating the clubs as clients, they were able to raise awareness from 14 percent in 1993 to 83 percent in 2003.

Nora Carpenter, president and CEO of the Better Business Bureau of Southwestern Idaho & Oregon and leader of the Better Business Bureau’s (BBB) re-branding effort, echoed those same challenges and emphasized that it is not a quick and easy process. She credits the in-progress success of the BBB’s efforts to an awareness of the importance and strength of the local offices. A unique aspect of their re-branding effort is their inclusion of “loaned executives” from the local offices that lead the efforts of the national office.

**Drawing Attention using the Media**

 Creating messages and the programs that support them are critical to the success of nonprofit marketing efforts. However, Toliver explained that building movements that give life to these tactics are the keys to sustaining and transforming the organizations themselves. The catalysts of such movements are marketers who are able to direct the media attention to what the organization wants the world to see and hear. These marketers are responsible for determining whether or not a movement forms around their organization and their organization’s goals.

According to Toliver, the key to change is not activism but determination. In order to change society, the “moderate middle” needs to decide that something is wrong; and the best way to get them to see this is by “turn(ing) the cameras on.” This idea was echoed by Smith, who noted that
drawing media attention to social programs was extremely effective in broadcasting the message about a social problem.

One of the best ways of attracting media attention is by partnering with media firms. Variety’s partnerships with local television stations, newspapers, and radio stations had secured them publicity (32 pages of print, four hours of TV coverage – two of which were in prime time, sponsor advertising, outdoor billboards, and editorials) that the organization would have been unable to afford or coordinate by itself. This aspect of partnering was clearly illustrated by Cynthia Round, executive vice president of brand strategy and marketing and Randy Punley, director of corporate partnerships at United Way of America with regard to United Way and MTV’s Alternative Spring Break program, where the media was not just a means of communication, but an agent for social change. Through this media partnership, the organization was able to build legitimacy and credibility with an audience it had been unable to access previously. By tying in to the partner’s own social mission and leveraging the partner’s understanding of its audience, United Way was able to generate messages and publicize programs that achieved its goals.

In addition, Round and Punley showed that partnering with a media firm attracts both other nonprofits as well as other media for-profits to join the campaign. The Alternative Spring Break program attracted participation from local nonprofit chapters in Louisiana, as well as national organizations like Habitat for Humanity and AmeriCorps. It also grabbed the attention of international journalists, Fox News, LA Times, CNN, Chicago Tribune and even The China Post.
For many nonprofit organizations, the Internet becomes an effective and efficient medium to use in its media toolbox. Several presentations focused on the effective use of the web. Ellen Hur, the director of marketing and recruitment for the New York City Teaching Fellows outlined how their entire infrastructure is supported by their Internet presence. All messages are tailored to the specific categories of stakeholders. Users log in and are directed to content specifically developed for the user. This system allows them to manage a large number of applicants and teaching fellows.

Some nonprofits have found the greatest amount of success through the Internet when they turned control of some content over to users. Steve Daigneault, director internet communications for Amnesty International and Julie Witsken, senior manager of engagement marketing for AARP, both found success through the viral applications that are available through the Internet. Their message was to resist having too many objectives when launching an internet campaign and to consider the medium as an opportunity to learn. Trying to control every aspect of a viral campaign can be futile and is often more successful when you control what you can, and let go of the rest. The organic nature of a viral campaign necessitates this mindset.

**Organizational Size**

The same issues relating to changing behavior through integrating message and program and capturing media attention affect all (or, at least, most) organizations. However, organizations face additional challenge in achieving these based on organizational size. Where funds are limited, organizations can engage in several tactics to increase their reach without increasing cost. Fawal spoke of using online campaigns to spread messages to wide audiences at low cost.
In addition, he said that by understanding the audience, the marketer has knowledge of which members will respond to various forms of communication. In this way, the nonprofit saves money by eliminating large random mailings and campaigns that reach no one effectively, and targets specific messages to identified individuals through the appropriate media.

As mentioned by Jacobs, one way to gather this information cost-effectively is to capture information at as many touch-points between members and the nonprofit as possible. Justin Greeves, vice president and business leader of public affairs research at Harris Interactive, added that organizations can affordably buy syndicated research (generic research on a single industry done once by a research firm, but sold many times) or participate in omnibus research (where the organization can ask two or three custom questions that are added into a larger research questionnaire) in order to better understand their market. Jan Albus, executive director of Variety the Children’s Charity of St. Louis, emphasized the importance of tapping into partners’ social and charitable goals to coordinate large-scale campaigns, like Purina pet food retail campaigns and the 2006 Variety Week that the small local organization would ordinarily be unable to attempt alone.

While cost saving is one way that nonprofits achieve marketing success, another is through income-generation. Todd Whitley spoke of developing online plans for for-profit partners that bring in revenue for the nonprofit. Lynn Osmond gave insight into other potential ideas for generating income for smaller organizations, linking back to understanding the organization’s different audiences and understanding their needs, in order to develop programs to enable new and existing customers to engage with the organization in ways that bring in funds.
With regard to implementing campaigns in large organizations with numerous local offices, Goodman emphasized the importance of recognizing the purpose and value of local branches, especially in programs that are driven nationally where the tendency might be to require participation of local offices, but not adequately involve them in benefiting from the successes of campaigns. Ensuring that revenues generated by campaigns are allocated to the offices that helped achieve the success increases the success of campaigns and drives campaign support in local offices.

**Summary**

The main ideas of the conference were encapsulated in the panel session with Kurt Aschermann, president/ chief operating officer of Charity Partners, LLC and former chief marketing and development officer of Boys & Girls Clubs of America; Jane Gilbert, senior vice president of Chapter and Service Area Support at the American Red Cross; and Nora Carpenter, president and CEO of the Better Business Bureau of Southwestern Idaho and Oregon, and Leader of BBB’s rebranding.

Their session on creating brand consistency between local chapters and with the national office directly addressed the challenge of ensuring a single focus of changing behavior through designing unified messages and programs. Despite having large budgets to start with, the creation of a single image enabled both the Boys & Girls Clubs and the American Red Cross to increase donations and volunteerism. The acknowledgement of the role of local chapters as the real drivers of interaction with the public and volunteers was pivotal to gaining local buy-in and
support to ensure rebranding success. The brand visibility generated by the Boys & Girls Clubs campaign using Denzel Washington as a spokesman not only mobilized the public around the organization’s mission, but unified the organization’s employees and volunteers in their quest to change behavior.
Conference Presentations Cited

Jan Albus, Executive Director, Variety the Children’s Charity of St. Louis. Panel on “Mission Driven Partnerships”

Alan Andreasen, Professor of Marketing, Georgetown University. Nonprofit Marketing – Toughest Job You’ll Ever Love!

Katya Andresen, Vice-President of Marketing, Network for Good. Panel on “Cultivating your Constituent Online”

Kurt Aschermann, President and Chief Operating Officer, Charity Partners, LLC. Panel on “Marketing the Brand Internally”

Brenda Bax, Director of Pets for People, Nestlé Purina Petcare Company. Panel on “Mission Driven Partnerships”

Nora Carpenter, President and CEO, Better Business Bureau of Southwestern Idaho and Oregon. Panel on “Marketing the Brand Internally”

Larry Checco, Principal, Checco Communications. Branding for Success: A Roadmap for Raising the Visibility and Value of your Nonprofit Organization

Jonathon D. Colman, Senior Manager and Web Evangelist, Digital Marketing, The Nature Conservancy. Panel on “Cultivating your Constituent Online”

Steve Daigneault, Director, Internet Communications, Amnesty International. Panel on “Viral Campaigning through the Ages”

Matthew Degalan, Senior Vice-President, MercyCorps. Panel on “Cultivating your Constituent Online”

Eric Eckl, Senior Campaigns & Marketing Consultant, Beaconfire Consulting. Panel on “Web 2.0: Beyond the Buzz”

Kristen Esposito, Macy’s. Panel on “Mission Driven Partnerships”

Richard Fawal, Vice-President, OnPoint Advocacy. Panel on “Advocating for Change”

Joseph Fay, Conference Chair and Executive Director, Children’s Brain Tumor Foundation. Opening Remarks

Jane Gilbert, Senior Vice-President of Chapter and Service Area Support, American Red Cross. Panel on “Marketing the Brand Internally”
Laura Goodman, Director of Corporate Marketing, **Reading is Fundamental. Panel on “Mission Driven Partnerships”**

Justin Greeves, Vice-President and Business Leader of Public Affairs Research, **Harris Interactive. Market Research on a Shoestring**

Ellen Hur, Director of Marketing and Recruitment, **New York City Teaching Fellows. Panel on “Communicating on a Shoestring Budget”**

Sheri Jacobs, Managing Director, **McKinley Marketing. Researching your Membership**

Allyson Kapin, Online Manager, **Campaign for Tobacco-Free Kids** and Partner, **Rad Campaign. Panel on “Internet Marketing on a Shoestring”**

Dina Lewis, CAE and President, **Distilled Logic, LLC. Panel on “Internet Marketing on a Shoestring”**

Peter Lynch, Executive Administrator, **Lions Club International.** Presented by Joselyn Zivin. **Panel on “Basics of Managing your Brand”**

Casey Minix Bagnall, Strategic Partner Relations, **American Red Cross. Panel on “Mission Driven Partnerships”**

William Novelli, CEO, **American Association of Retired Persons. Managing Marketing’s Triple Bottom Line**

Lynn Osmond, President & CEO, **Chicago Architecture Foundation. Panel on “The Proof is in the Numbers – Showing the Boss that Marketing Works”**

David Patterson, Director of New Media, **Heifer International. Panel on “Web 2.0: Beyond the Buzz”**

Joshua Peck, Internet Director, **The One Campaign. Panel on “Web 2.0: Beyond the Buzz”**

Holly Pitt Young, Vice-President, **Democracy, Data & Communications. Panel on “Advocating for Change”**

Randy Punley, Director, Corporate Partnerships, **United Way of America. United Way and MTV’s Alternative Spring Break: a Transformational Campaign**

Cynthia Round, Executive Vice-President of Brand Leadership, **United Way of America. United Way and MTV’s Alternative Spring Break: a Transformational Campaign**

William Smith, Executive Vice-President, **Academy for Educational Development. Transforming Behavior with Marketing Tools**
Bill Toliver, Executive Director, The Matale Line. Can Marketing Create a Movement?

Arlin Wasserman, Executive Director, America on the Move Foundation. Panel on “Cultivating your Constituent Online”

Todd Whitley, Vice-President: eMarketing, The Leukemia & Lymphoma Society. Panel on “The Proof is in the Numbers – Showing the Boss that Marketing Works”

Donna Wilkins, President, Charity Dynamics. Panel on “Internet Marketing on a Shoestring”

Jennie Winton, Founding Partner, Mission Minded. Panel on “Basics of Managing your Brand”

Julie Witsken, Senior Manager, Engagement Marketing, American Association of Retired Persons. Panel on “Viral Campaigning through the Ages”

Joselyn Zivin, Senior Vice-President, Lipman Hearne. Panel on “Basics of Managing your Brand”