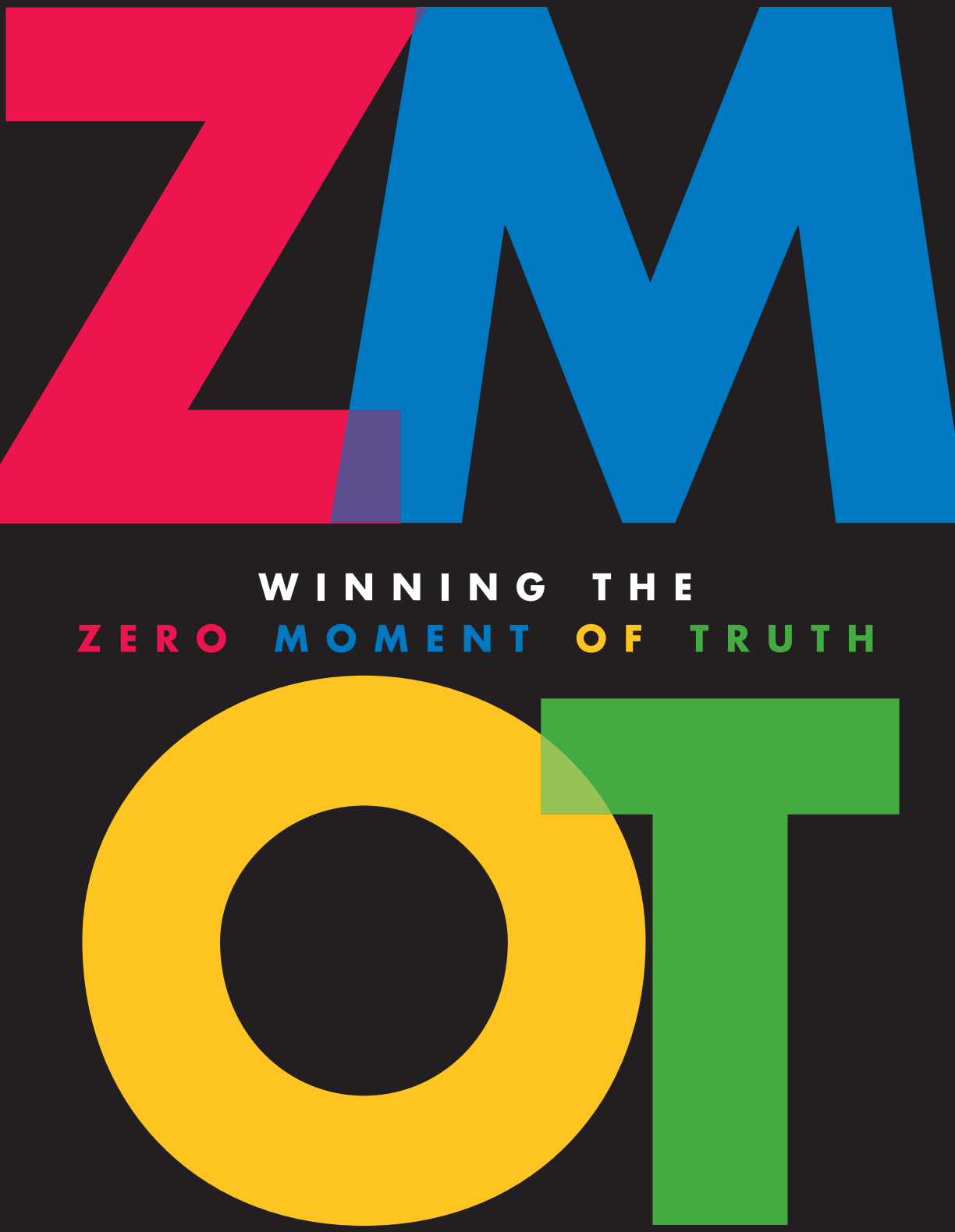
ZMOT
WINNING THE
ZERO MOMENT OF TRUTH
Google™

ZMOT

WINNING
THE ZERO MOMENT
OF TRUTH

By Jim Lecinski

Google

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FOREWORD

FOREWORD

DINA HOWELL

Chief Executive Officer
Saatchi & Saatchi X

I'm passionate about marketing. I believe consumers will tell us what they want and need in their lives, if only we will listen anew every day.

At Saatchi & Saatchi X, we recently conducted a study to understand the emotional benefits that drive and influence shopping behavior. Those benefits, we found, include the satisfaction of deep needs for self-creation, mastery, security and connection.

Shoppers today want to explore and think about how products can improve their lives. They do reconnaissance to gain the insights they need, and they're driven to bond with others and enrich relationships as they learn. They are motivated by a desire to take charge of their own identities and the well-being of their families and homes.

The process of meeting those shopper needs begins at the Zero Moment of Truth.

Most of us understand the critical decision moment at the shelf — the First Moment of Truth, as we named it when I was at Procter & Gamble. Yet today's consumers know so much more before they reach the shelf. They find incredible detail online, from every possible source, about the brands and products that matter to them. They browse, dig, explore, dream and master, and then they're ready to buy with confidence. And what they learn, they share with others.

The Zero Moment of Truth influences which brands make the shopping list, where shoppers choose to buy and with whom they share the results. It's up to us to join the conversation at this new moment where decisions are being made, and to provide the information that shoppers naturally crave, in all the ways that they crave it.

I've known and respected Jim Lecinski for many years. He and the Google team have been trusted colleagues and advisers through the amazing growth and new opportunities of the online world during my tenure at Procter & Gamble, as well as in my current agency leadership role.

This book will help anyone interested in those new moments before people buy, those Zero Moments of Truth where first impressions happen and the path to purchase often begins. If you care about helping shoppers explore, dream and find what they're looking for — in short, if you're passionate about the future of marketing — this book is for you.

CHANGING THE RULEBOOK
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CHANGING THE RULEBOOK

CHAPTER

1

CHANGING THE RULEBOOK

"When consumers hear about a product today, their first reaction is 'Let me search online for it.'

And so they go on a journey of discovery: about a product, a service, an issue, an opportunity.

Today you are not behind your competition. You are not behind the technology. You are behind your consumer."

— Rishad Tobaccowala
Chief Strategy & Innovation Officer
VivaKi

Every so often, something comes along and changes the rulebook.

A few months ago I stayed in a rather large hotel in New York City. On the way up to my room I saw a lobby poster: "See the Max Weinberg Band in the ballroom tonight at 8 p.m."

Now, I happen to like Max Weinberg. So this was a classic marketing situation: The stimulus is the poster — "see Max Weinberg!" — and my response is obviously to go down to the ballroom at eight, buy a ticket and see the show.

But I didn't do that.

Instead I went up to my room, opened my laptop and started searching. Because I wanted to know, "What kind of music is he playing? What's his band like? How much does it cost? What's the ballroom like?" And when I was done, then I made my decision.

Why am I telling you this?

Because that little moment is the moment that's changing the marketing rulebook. It's a new decision-making moment that takes place a hundred million times a day on mobile phones, laptops and wired devices of all kinds. It's a moment where marketing happens, where information happens, and where consumers make choices that affect the success and failure of nearly every brand in the world.

At Google, we call this the **Zero Moment of Truth**, or simply ZMOT ("*ZEE-mot*").[1]

A Zero Moment of Truth is:

A BUSY MOM IN A MINIVAN, looking up decongestants on her mobile phone as she waits to pick up her son at school.

AN OFFICE MANAGER AT HER DESK, comparing laser printer prices and ink cartridge costs before heading to the office supply store.

A STUDENT IN A CAFE, scanning user ratings and reviews while looking for a cheap hotel in Barcelona.

A WINTER SPORTS FAN IN A SKI STORE, pulling out a mobile phone to look at video reviews of the latest snowboards.

A YOUNG WOMAN IN HER CONDO, searching the web for juicy details about a new guy before a blind date.

ZMOT is that moment when you grab your laptop, mobile phone or some other wired device and start learning about a product or service (or potential boyfriend) you're thinking about trying or buying. I'm sure you know what I mean — you probably do web searches like this every day.

BUT

Would it surprise you to know that a full 70% of Americans now say they look at product reviews before making a purchase?[2]

Or that 79% of consumers now say they use a smartphone to help with shopping?[3]

Or that 83% of moms say they do online research after seeing TV commercials for products that interest them?[4]

Those incredible numbers shouldn't surprise us anymore. This is how consumers live and learn and make decisions today: from ratings and review sites, from friends on social media, at home and on the go, and (more than ever) from video. They learn from search results, user reviews, four-star ratings, text ads, image ads, news headlines, videos and even good old-fashioned official brand websites.

They learn and decide, in short, at the Zero Moment of Truth.

* * *

Let me take one step back.

On September 21 of 2005, *The Wall Street Journal* published a front-page story that changed the face of marketing.

That story was about the critical importance of the seven seconds after a shopper first encounters a store shelf full of detergents or toothpaste or anything else. Remember the old phrase, "Look for it in your grocer's freezer case"? That's the moment we're talking about — when you're standing there, looking at all that frozen pizza and deciding which to buy.

Procter & Gamble called that moment the First Moment of Truth, or FMOT ("*EFF-mot*"). This moment was so important to P&G that they created a position titled Director of FMOT, and tapped Dina Howell to fill the job. And *The Wall Street Journal* found it so influential that they put it on the front page.

The same year, in his foreword to Kevin Roberts' remarkable book *Lovemarks*, Procter & Gamble CEO A.G. Lafley put it this way:

> *The best brands consistently win two moments of truth. The first moment occurs at the store shelf, when a consumer decides whether to buy one brand or another. The second occurs at home, when she uses the brand — and is delighted, or isn't.*

Mr. Lafley was right then and he's right now. Those first and second moments of truth are just as vital today.

AND

Now there's a new critical moment of decision that happens before consumers get to their grocer's freezer case. Whether you sell yachts or shaving cream, your customers' first impression — and quite possibly their final decision — will be made in that moment: ZMOT.

Marketers devote tremendous amounts of energy and money to the first two moments of truth. But the new question is: Are you winning the Zero Moment of Truth?

* * *

We've spent a lot of time thinking about this question at Google.

ZMOT is now core training for all members of the Google sales team. It's part of our DNA — not just in the U.S., but around the world. (Our Australian team, naturally, calls it *ZedMOT*.)

We're in a unique position to observe the power of ZMOT: its power to help shoppers make great decisions and its power to help companies tell their stories at the moment of highest impact. ZMOT turns small wins into huge ones — and potentially big wins into letdowns — millions of times a day, around the clock.

To define the impact of ZMOT in numbers, we commissioned a major study from the independent research firm Shopper Sciences. They reached 5,000 shoppers across 12 different subcategories with surveys specially designed to show exactly which sources influenced shopper buying decisions. I'll share that research with you for the first time here.

This is a book about transformation and change. I'm going to show you how to make that change work for you and your company.

* * *

If you're the type who likes to peek ahead, I'll tell you right now what you'll find in this book.

- **The buying decision journey has changed.** ZMOT is a vital new addition to the classic three-step process of stimulus, shelf, experience.
- **What was once a message is now a conversation.** Shoppers today find and share their own information about products, in their own way, on their own time.
- **Word of mouth is stronger than ever.** For the first time in human history, word of mouth is a digitally archived medium.
- **No MOT is too small.** If consumers will do research online for houses and health care, they'll also do it for Band-Aids and ballpoint pens.
- **The MOTs are meeting.** Our mobile devices are MOT machines. As mobile usage grows, the zero, first and second moments of truth are converging.

I've talked with a number of leading marketers about ZMOT and I'll also be sharing their wisdom with you: how to know what customers are looking for, be part of the conversation and win the day.

Let's dig in.

THE NEW MENTAL MODEL

CHAPTER

2

THE NEW MENTAL MODEL

"Engagement with the customer today isn't just pouring a message down on their head and hoping they get wet.

It really is understanding that you must be present in a conversation when they *want to have it, not when you want to.*

Pre-shopping before buying has become a huge, huge part of customer behavior. In the past, it was pretty much confined to big-ticket items like cars, or expensive electronics or homes. Now people engage in discovery before shopping on very small things.

It's crossed all categories of shopping behavior. It's just the way people buy today."

— Bob Thacker
Gravitytank Strategic Advisor
and former CMO of OfficeMax

"Human beings can't run a mile in under four minutes. It simply isn't possible."

Sound crazy? It does now. But for decades it was a common point of view. It was a mental model: an assumption about how the world worked. As Professor Jerry Wind of the Wharton School tells the story:

The four-minute mile seemed like a physical barrier that humans could not cross… until May 6, 1954. That was the day that Roger Bannister, in a meet at Oxford, ran a mile in 3:59.4. He broke the barrier. Suddenly, in the next three years, 16 other runners cracked the four-minute mile as well.

Was there some breakthrough in human evolution? No. What had changed was the mental model.

As it happens, there's also a classic mental model for marketing. For decades

we've practiced our craft by focusing on three critical moments: stimulus, shelf and experience.

Stimulus. Dad is watching a football game and sees an ad for digital cameras. He thinks, "That looks good."

Shelf. He goes to his favorite electronics store, where he sees a terrific stand-up display for that same digital camera. The packaging is great. A young sales guy answers all his questions. He buys the camera.

Experience. Dad gets home and the camera records beautiful pictures of his kids, just as advertised. A happy ending.

Those three steps have been *the* mental model of marketing for a long time.

Figure 2-1: The traditional 3-step mental model

But the big news for marketers today is the critical new moment between stimulus and shelf in every product category. Dad still watches football and he still sees your TV commercial. But now he grabs his laptop off the coffee table and searches for "digital camera reviews." He looks at comments from users on CNET and two other sites. He goes to Twitter and posts: "Anybody have a great camera for under $100?" He hits YouTube and searches "digital camera demos." Before the game ends — and before he gets to the store shelf — he's ready to make a decision.

If you're a brand manager, you've got policies, methodologies, training, shopper marketing agencies, partners and budgets to win those original three steps of stimulus, shelf and experience.

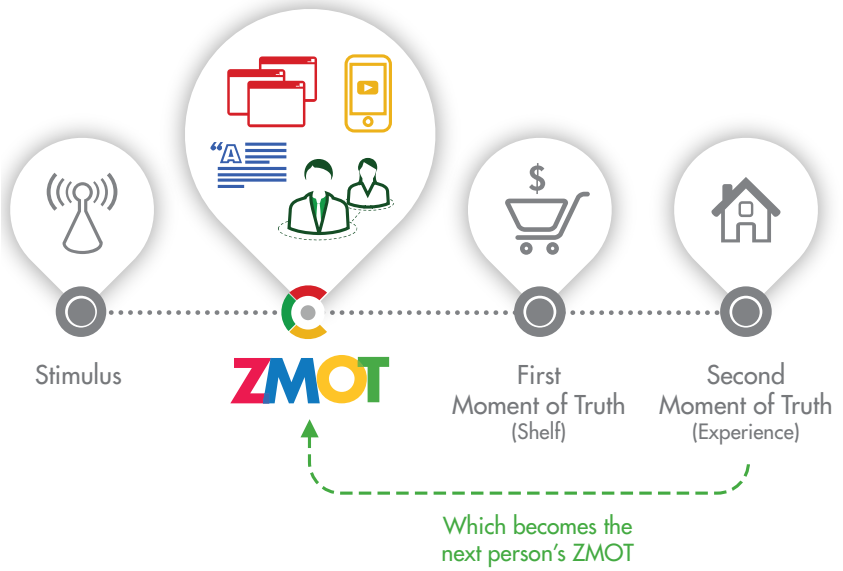
But what do you have in place to win that grabbing-the-laptop moment — the Zero Moment of Truth?

Probably not much. And you're not alone. American households now spend as much time online as they do watching TV, according to Forrester Research. Yet in 2010, only about 15% of media ad budget money was spent online.[1] Online decision-making is skyrocketing; online marketing budgets aren't.

Change your marketing mental model to include ZMOT, and you stand to gain a

very big competitive advantage. Because you'll reach those millions of shoppers who are making decisions before they enter the store.

Figure 2-2: The new mental model



And by the way, it's not just stores and consumer packaged goods we're talking about. ZMOT is at work across all industries, in B2B and B2C, and in areas like education and politics. Voters still see traditional billboards and lawn signs with classic calls to action like "Vote for Anderson" or "Punch #107." But just like that dad looking for a new camera, voters today make a lot more of their decisions before they reach the ballot box, at the Zero Moment of Truth.

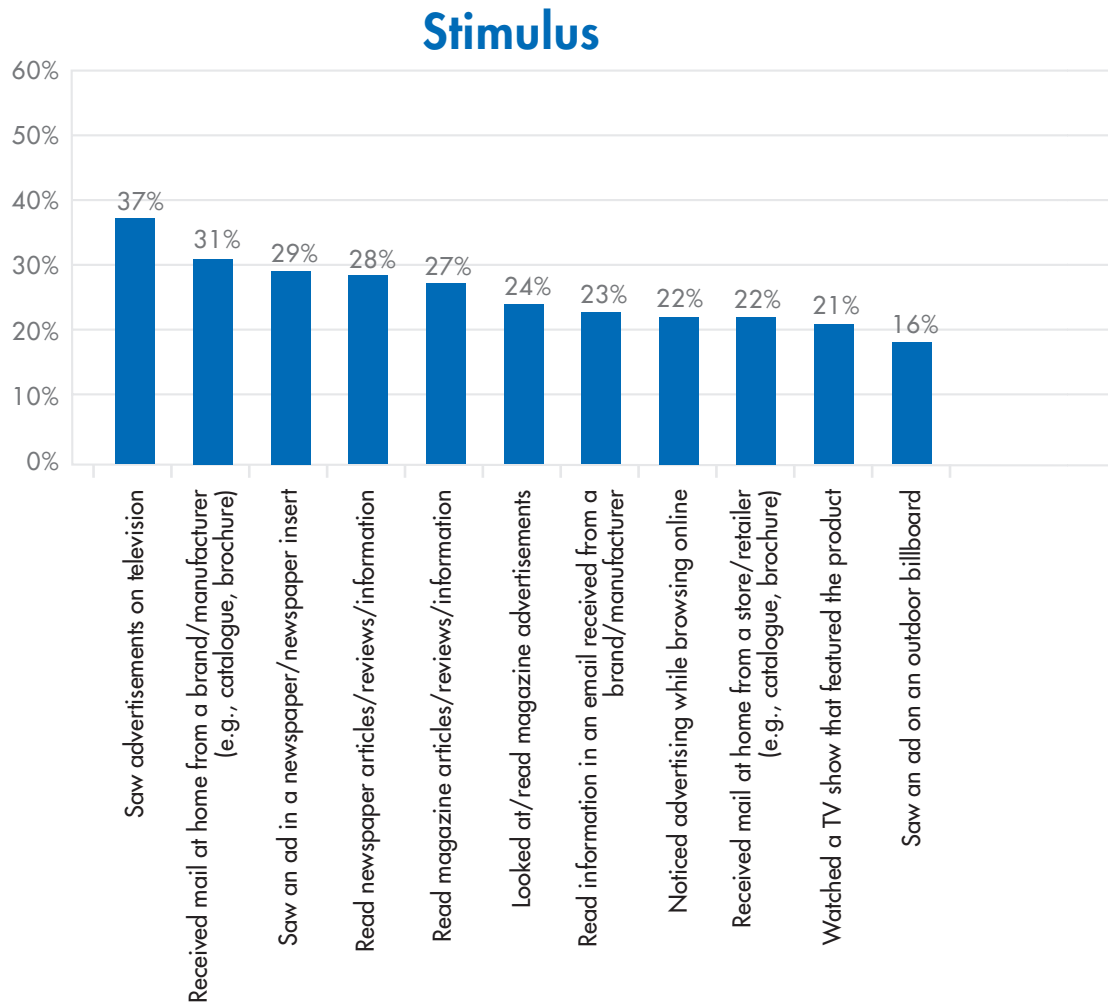
* * *

Just how important is ZMOT in driving decisions? Google asked Shopper Sciences to do a comprehensive study of 5,000 shoppers across 12 categories, from groceries to cars to financial products. The goal: show where influence takes place as shoppers move from *undecided* to *decided*.

The data revealed that the average shopper used 10.4 sources of information to make a decision in 2011, up from 5.3 sources in 2010.[2] Yes, that number nearly doubled in one year — which shows you just how tough it is for marketers to grab the attention of consumers today. Shoppers are swimming in information. Those 10.4 sources range from TV commercials and magazine articles, to recommendations from friends and family, to websites, ratings and blogs online.

We learned that plenty of pre-shopping goes on in every category. Shoppers are digging up more information, from more sources, before they buy. Here's how those sources look in chart form, divided into stimulus, ZMOT and FMOT.

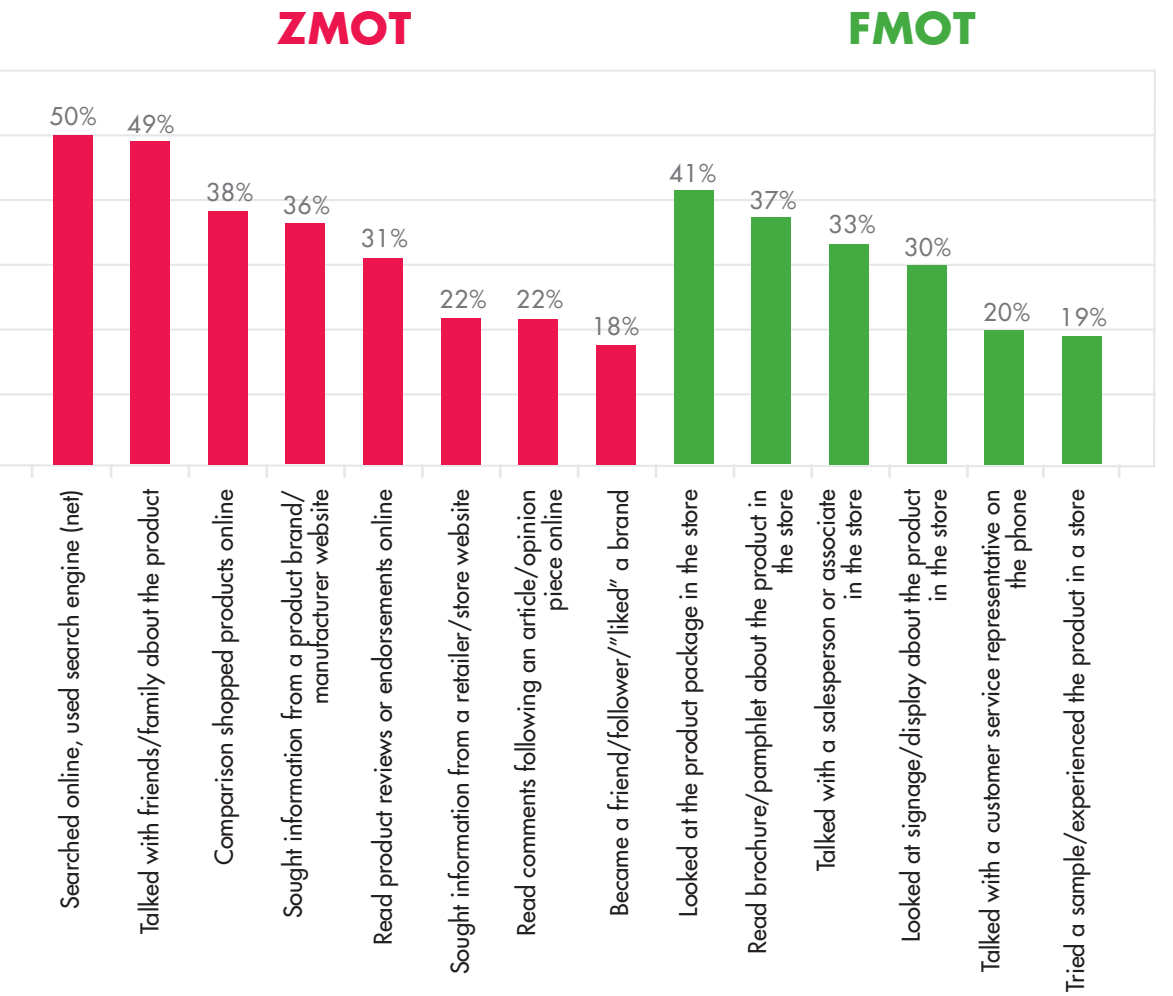
Figure 2-3: Top sources used by shoppers when making purchase decisions by type (top defined as those above a 17% source usage average)



Q2 When you were considering purchasing [PRODUCT] what sources of information did you seek out to help with your decision?

Base N=5,003

Source: Google/Shopper Sciences, Zero Moment of Truth Macro Study, U.S., April 2011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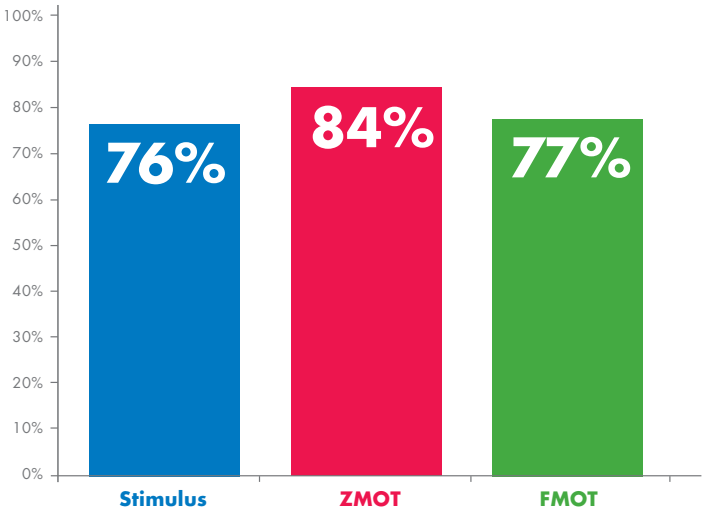
Sought information from a product brand/ manufacturer website
Read product reviews or endorsements online
Sought information from a retailer/store website
Read comments following an article/opinion piece online
Became a friend/follower/"liked" a brand
Looked at the product package in the store
Read brochure/pamphlet about the product in the store
Talked with a salesperson or associate in the store
Looked at signage/display about the product in the store
Talked with a customer service representative on the phone
Tried a sample/experienced the product in a store

The overall numbers:

Figure 2-4: Sources used by net type



Q2 When you were considering purchasing [PRODUCT] what sources of information did you seek out to help with your decision?

Base N=5,003

Source: Google/Shopper Sciences, Zero Moment of Truth Macro Study, U.S., April 2011

In our study, 84% of the shoppers said that ZMOT shapes their decisions. It's now just as important as stimulus and FMOT in moving consumers from undecided to decided.

* * *

It's not mind-blowing news that shoppers like to do research, of course. Shoppers have always talked over the back fence and looked into products on their own.

As Bob Thacker said at the start of this chapter, determined shoppers would go to the library to see what *Consumer Reports* had to say about cars or washing machines. There were other unique research tools: the *Mobil Travel Guide* had good advice on hotels. Zagat guides gave out tips on restaurants. (They were even sized to fit in a pocketbook — a mobile app in book form!) But for most items, the barrier was easy access. Fresh and detailed information about a given product was the exception.

That exception is now the rule.

There are no barriers to access. Today's shoppers carry access in their pockets. They create their own consumer guides a million times a minute with reviews, tweets, blogs, social network posts and videos for products of all kinds.

It's simply the new mental model and the new conversation we all have to be a part of now.

Procter & Gamble, the originators of FMOT, see the same trend. I talked to my friends there recently and they're adding more emphasis on what they call "store back" — urging their marketers to think about each consumer's brand experiences working back from the shelf to the moments before the store.

Speaking of FMOT, notice that all three of the original steps — stimulus, shelf, experience — are still essential. The stimulus still has to drive the consumer to think about a digital camera. We still want to help consumers make good decisions and choose our brand.

What's changed is that the stimulus now drives consumers to a new stopover on their way to the shelf. When that camera shopper began searching, the information wasn't "poured on him" — he actively hunted for and pulled down what he wanted.

Kim Kadlec, worldwide vice president, Global Marketing Group, Johnson & Johnson, describes the change in mental models this way:

> *We're entering an era of reciprocity. We now have to engage people in a way that's useful or helpful to their lives. The consumer is looking to satisfy their needs, and we have to be there to help them with that. To put it another way: How can we exchange value instead of just sending a message?*

The wonderful potential of this, if you're willing to work at it, is to have an intimate relationship with consumers. And that leads to the ultimate moment of truth: when the customer buys your product again.

* * *

Grab your own laptop or smartphone right now — I'm betting they're not far away — and go to your favorite search engine. Enter the name of your company's flagship product, or of any other product you like.

You probably see the official brand site for that product near the top of the search results. So far, so good.

Now enter the name of that product and add the word reviews. Then do a new search and try putting the word "best" with your product category: best law school, best digital camera, best hotel in Florida, whatever you like. What else do you see on the page? I'm betting you see ratings and opinion sites, online stores, coupons, images, demonstration videos… and competitor sites.

This is the information your shoppers now use to make their decisions.

My question for you: Are you happy with what you see? Based on what you see, will somebody buy your product? Can they even *find* your product?

This is the new digital shelf. Consumers arrive there, 24 hours a day, ready to engage. They're anybody's to win or lose. The opportunity is incredible; are you ready for it?

The world record for the mile, by the way, is now down to 3:43.13.[3]

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CHAPTER

3

ZMOT ALL AROUND US

"We've all had those Sunday evening standing-in-front-of-the-mirror moments, when we suddenly know we've got to drop a few pounds.

In the past you'd go into the kitchen and grab the phone book off the top shelf and flip through it and probably not even know what category to start with. But now you go online immediately. The amount of brand and user-generated content available instantly at ZMOT is just amazing.

Our drive now is almost exclusively online. We have lots of resources available to prospective health club members, whether they hear about us in conversation or have one of those mirror moments. Even late on Sunday night."

— Dennis Cary
Chief Marketing Officer and SVP
Bally Total Fitness

What makes a Zero Moment of Truth?

• It happens online — typically starting with a search on Google, Bing, Yahoo, YouTube or any other search tool or engine.

• It happens in real time, at any time of the day. More and more, it happens on the go: mobile searches on Google doubled last year.[1]

• The consumer is in charge, pulling the information she wants rather than having it pushed on her by others.

• It's emotional. The consumer has a need she wants to satisfy, and an emotional investment in finding the best solution.

• The conversation is multi-way: marketers, friends, strangers, websites and experts all have their say and compete for attention.

Last chapter I mentioned that 84% of the decision-makers in our Shopper Sciences 2011 Macro Study used online sources to guide them. We also asked those shoppers to rate how *influential* each source was. For those who used online sources, this was the key stat:

54% comparison-shopped for products online

It's not just the availability of product information that's changed, but the ways shoppers think about it. Marketers are used to talking about the purchase process as a funnel: Consumers are driven through the broad opening by ads or other stimulus, whittle down their choices, and then drop out the narrow bottom with a purchase. It's a very linear way of thinking.

But talk to shoppers today about their path to purchase, as I do, and you'll get surprisingly nonlinear answers. As this new data from Shopper Sciences points out, the behavior of individual shoppers now is iterative and nonlinear. Shoppers don't always move through a funnel, narrowing choices as they go; at ZMOT, they can actually widen their choices. The more they learn, the more options they consider.

The funnel is now more like a neuron, with branches that let shoppers move forward and backward through the process until they're ready to make a decision.

ZMOT has as many motivations and takes as many forms as there are people online. Here are some classic "ZMOTivations":

Seeking and Sharing New Ideas

Ten million times a day, Google sees searches like this: *pumpkin bread recipe, low-fat recipes*, *Texas-style chili*, *gluten-free muffins, Thanksgiving side dishes, how to make old-fashioned chocolate chip cookies*.

Recipes make up 1% of all searches on Google, in fact.[2] Today's bakers go online to seek out new ideas and deeper details on calories and ingredients. They find more than recipes, too. They find stories and reports from food and family magazines, ratings on sites like Epicurious.com, official sites from Duncan Hines, Pillsbury and Betty Crocker, and much more.

Sure, recipes can still be found on labels and bags. But today many shoppers have already made their choice of what to cook or bake before they reach the store.

Arming for Battle

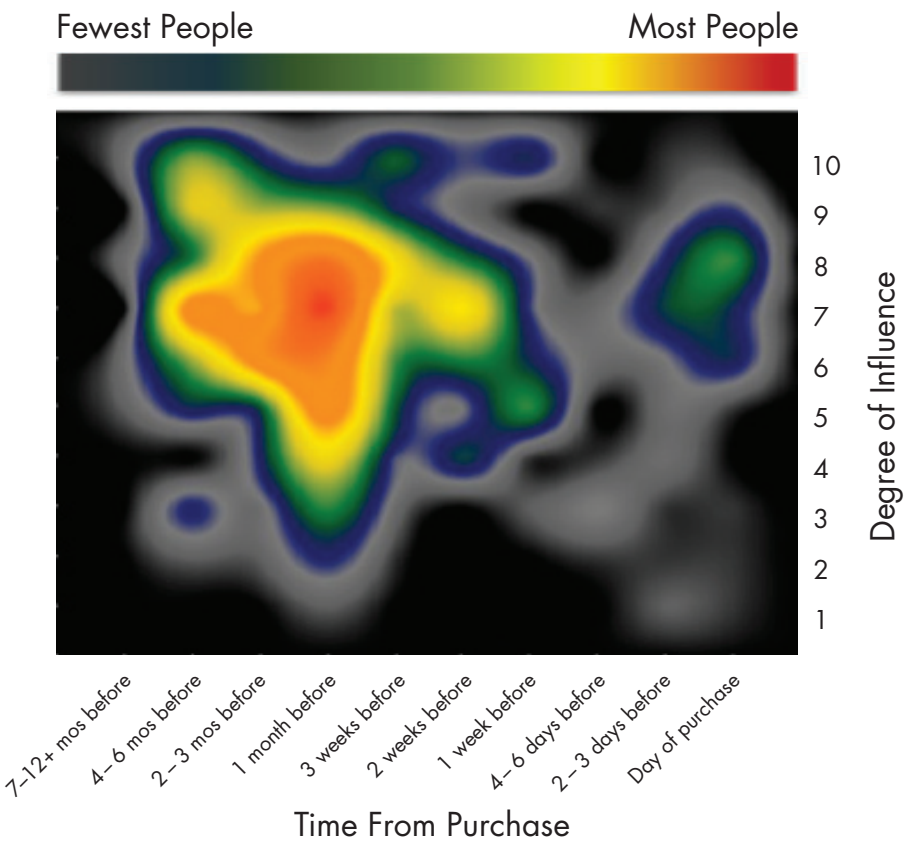
A customer walks into the dealer and says, "I want to drive the Lexus 250h with the touring package, the 2.4-liter four-cylinder engine, dual-zone climate control and tan leather with seat warmers. I've seen the specs and read the reviews online. And I know that the MSRP is $37,125, but your real invoice price is $33,686."[3]

What happened? ZMOT happened. This customer started her car-buying journey with a search for "mid-priced sedans." She saw ads from seven other brands, stories from MotorTrend.com and RideLust.com, and a lot more.

Later she switched to searches like "ratings for Lexus 250" and found reviews from AOL Autos, Epinions, Cars.com and several other sources. Then she went to Edmunds and Kelley Blue Book to look for prices. And then she went to the Lexus official site to check paint and interior colors and other options. If you've bought a car lately, you've seen this woman in the dealership with a handful of ZMOT printouts, or showing her smartphone screen to the salesperson. Maybe you've been that woman yourself.

Shopper Sciences analyzed the sources of influence on car buyers over the length of their purchase cycle. They asked shoppers, "Did you use search engines in your decision?", "How influential were search engines in your decision making?" Then they turned the results into this heat map:

Figure 3-1: Net influence of search engines heatmap for auto



Base N=500

Source: Google/Shopper Sciences, Zero Moment of Truth Automotive Study, U.S., April 2011

What do car shoppers learn through search engines? It turns out that 64% say they look for price, 44% say vehicle performance and 37% say styling.[4] Many were asking those questions four months before they bought their car.

Making Smart Choices Fast

Let's go back to that minivan mom we mentioned in chapter one. Her ZMOT looks like this: She knows her son isn't feeling well, and now she's parked at school with her mobile device, searching for a decongestant. She's looking for:

1. More information about the product, and
2. Experiences that others have had with the product, and
3. Offers, discounts and coupons

In that moment she'll make two decisions: what to buy and where to buy it. So when she sees that a particular decongestant has good ratings, and that her local Walgreens is offering a coupon for $1.50 off, that sale has probably been made.

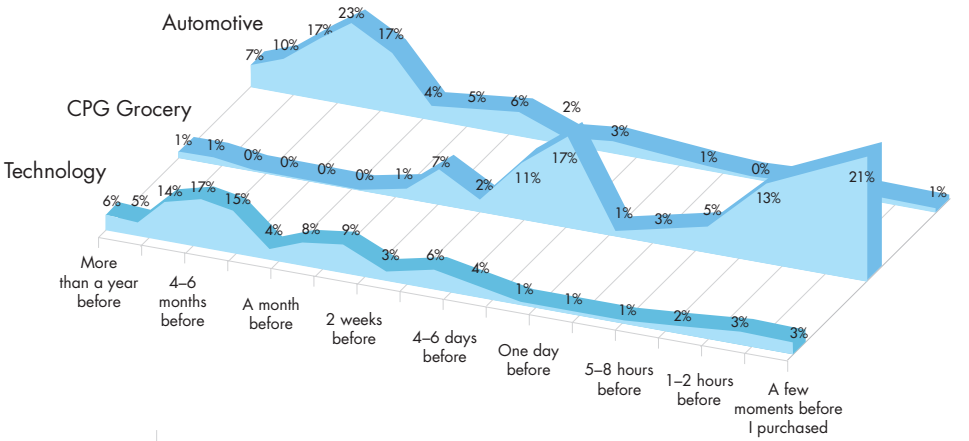
* * *

You see the advantage. If you're available at the Zero Moment of Truth, your customers will find you at the very moment they're thinking about buying, and also when they're *thinking about* thinking about buying. You can personalize your message for greatest impact with each possible moment and motivation.

You can also send your message to just the people you want. As Kim Kadlec of Johnson & Johnson points out, "You can deliver your message to a thousand moms who have kids ages 3 to 8, instead of just a thousand women."

And the "dwell time" that consumers spend during ZMOT is much longer than the time they'll spend at a store shelf. Here's a sampling of purchase cycle lengths across three very different categories:

Figure 3-2: Average purchase cycles for three diverse categories



Source: Google/Shopper Sciences, Zero Moment of Truth Industry Studies, U.S., April 2011
Automotive N=500, CPG Grocery N=500, Tech N=500

That's a lot of dwelling.

Google has studied paid ad clicks through what we call a search-ad pause analysis, to see what happens when advertisers turn paid search off. We looked at hundreds of paused campaigns to see if the advertisers could make up their lost paid clicks with clicks from regular organic search results. For the most part, they couldn't: on average, 89% of paid clicks were truly incremental.[5]

In short, with ZMOT you have a powerful shot at truly influencing customers in those "before the store" moments.

* * *

ZMOT becomes even more important when money is tight.

The average household spent $312 a month on groceries in 2010, according to the U.S. Department of Labor. If you're a typical family, you can't afford to buy the wrong kind of peanut butter or frozen dinners, because that seven bucks spent on the wrong product means now you can't afford dessert or a treat for your kids at the end of the month.

My Google colleague Catherine Roe gave me a perfect example the other day:

> *I have a neighbor who's not tech savvy, but when the recession hit, we were talking and she said, 'I've got four boys and I'm at the grocery store five days a week and it's just killing us. We've got college coming in a few years. I've got to start looking at how I'm spending my money.'*

> *She started couponing online. Then once she became savvy about sites like Coupons.com, she started looking at circulars and specials online and planning her meals out a week in advance. And then she also began to do research online for almost every product she bought to see what other people had said about it. It's contagious.*
>
> *She doesn't call it ZMOT, but she does tell me that now instead of going to the store five days a week, she's going one or two times a week. With coupons and research and planning her meals, she's saving $200 to $250 a month. She told me, 'That's college money for us. That's a vacation.'*

The Wall Street Journal said the same thing in a 2011 article titled, "In-Store Sales Begin At Home":

> *It's well known that consumers research expensive products like electronics online, but coming out of the recession, consumers are more scrupulous about researching their everyday products such as diapers and detergent, too. More than a fifth of them also research food and beverages, nearly a third research pet products and 39% research baby products.*[6]

Today, 62% of shoppers say they search for deals online before at least half of their shopping trips, according to that same article.

There are two heroes in all these stories: the consumer who does the research, and the grocery store manager or marketer who is smart enough to be there at the moment the shopper is looking for them.

As Rishad Tobaccowala of VivaKi says: "Don't call them search engines. Call them *connection* engines."

RATINGS & REVIEWS: WORD OF MOT **RATINGS & REVIEWS: WORD OF MOT**

CHAPTER

4

RATINGS AND REVIEWS: WORD OF MOT

"This is the first time in history that word of mouth has become a digitally-archived medium."

— Brett Hurt
Founder and CEO
Bazaarvoice

The tremendous explosion of ratings and reviews online has changed how people get information. But the change is still based on that oldest of human traits: word of mouth.

"Word of mouth is the medium we've been using since the tribal days to talk about essential knowledge," says Brett Hurt of Bazaarvoice. "Where's the hunting good? Where's the fishing good? How do you not get eaten by the saber-toothed tiger?"

Except today's tribal members aren't talking about tigers — they're talking about your product, every day, on a dozen sites you've heard of and a thousand sites you haven't. There are star ratings, reviews and raves online for every last detergent, multivitamin and Snuggie in your local drugstore. Look up any university in the country and you can find out who's the best history teacher. "Mesopotamia 401 with Professor Janney" — five-star class or bummer? You'll find out at ZMOT. It's where decisions are made.

What does word of mouth look like online?

- Consumers talking directly through email, social networks, chat and IMs, or posting videos on YouTube and other sites
- Reviews on sites like Epinions, TripAdvisor, DealerRater and Yelp
- Comments and ratings that show up next to businesses on applications like Google Maps
- Message boards on corporate and retail sites of all kinds
- Online community sites where moms, golfers, chefs or skateboarders compare notes and share information
- Seller ratings in search results (search for "kids bikes" on Google and you'll see the stars right at the top)

But there's one critical difference between old-fashioned word of mouth and the digital version. "Talking over the hedge is one-to-one," says Prof. Dave Reibstein, the William Stewart Woodside Professor at The Wharton School. "Digital word of mouth is one-to-millions. If you have a good experience, it's shared and re-shared with millions. You post it and suddenly, it's flying."

* * *

Audiences are asking three things about your product:

- Will it save me money?
- Will it save me time?
- Will it improve my life?

When people ask each other about your product at ZMOT, you can bet they'll be talking about one of these three things.

They probably already have a general idea of what they want. "I know a new TV is going to cost $500. I have $500. I just want to make sure I buy the very best TV for that money."

And you can bet they'll be close to making a decision. That's why they're standing in the aisle tapping away on their mobile phone, after all. Ratings and reviews are little signposts left by decision-makers for other decision-makers. The people who read them are not just noodling around online. These are people who are planning to buy.

* * *

CEOs and CMOs tend to get nervous about online ratings and reviews — especially about opening up their own sites to user comments. What if somebody says something negative? What if a whole lot of people do?

My answer to that is, *relax*. Here's why:

Most reviews are good. "We've found that the worldwide average for product reviews is a 4.3 out of 5.0," says Brett Hurt of Bazaarvoice. His company provides customer conversation services to corporations ranging from Wal-Mart to Johnson & Johnson. According to Brett, 80% of all reviews online are four to five stars.

There's more: "We find that there's a new version of the 80–20 rule: 80% of reviews on the site of a given retailer are written by the top 20% of their customers by lifetime value. We call them the super shoppers."

The math is simple enough: People like to talk most about the products they love the most.

Bad reviews aren't all bad. "People are scared to death of messaging not being all positive," says Dave Reibstein. "But negative comments add authenticity."

Brett Hurt puts it another way: "Fear of the negative is the thing that still really holds back adoption of the Zero Moment of Truth. We see that fear especially with people like

dentists or real estate agents, businesses that are more about a person than a product. But the truth is, negative reviews increase conversion rates for all kinds of businesses, because people see them and know that they're shopping in a truthful environment."

If you're building an awful product, that's one thing. But if your product is good (as it surely is) then you really shouldn't fear the occasional negative comment.

The conversation is already going on. Right now, at this moment, people are talking about your product online. You can't start it or stop it. You can choose not to engage, but that's really like sticking your head in the sand while a competitor jogs by to grab your customers. Better to welcome the conversation and be part of it yourself. As Brett Hurt puts it, "Word of mouth online has got to become part of the central nervous system for every company."

* * *

Why would people make decisions based on the opinions of strangers? They don't. They make decisions based on the opinions of *people like themselves*. Which is who they find at ZMOT.

"That's the mindset I'm in when I'm using online platforms," says Tina Sharkey, chairman and global president of BabyCenter. "On our site we see parents asking: 'My child just lost her first tooth. What are the going rates for the Tooth Fairy? When is it time to tell the truth about the Tooth Fairy? How do I handle that?'"

You'll see the same thing happen whether the topic is the Tooth Fairy or accounting software for a 20,000-person corporation. People look for others who have been in the same situation as they are now. They know that fellow consumers (unlike advertisers) aren't trying to sell them something.

Our 2011 ZMOT study found that 37% of shoppers find online social sources to be an influential driver when making decisions. That was up from 19% in 2010 — nearly doubling in one year. The top online social activities among shoppers:

- Getting an online referral from a friend
- Becoming a friend or follower of a brand
- Reading blogs where the product was discussed
- Seeing the brand mentioned on a social networking site like Facebook

People have a powerful urge to share knowledge once they reach their own "moment of mastery," as Tina Sharkey calls it. "That parent who has the kid with the certain allergies, she now knows how to navigate that. And she wants to share. She went through it, she acquired the knowledge herself, and now she's trying to really help and support others."

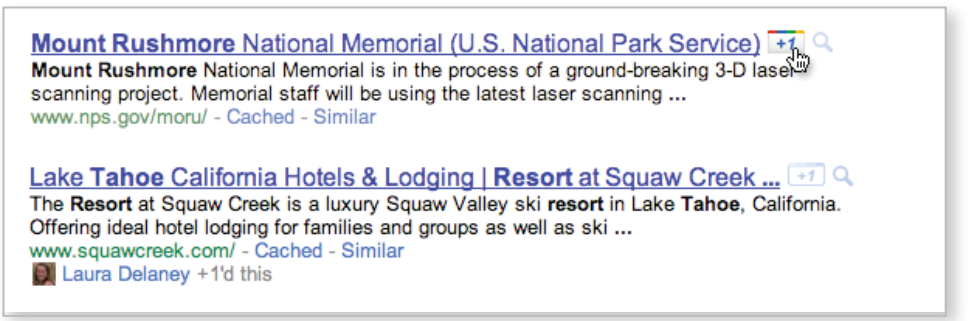
Most of us have empathy for people who are right behind us, going through the same thing. And if we can make it easier for them, we do. You know the old saying: "If only I knew then what I know now."

The truth is that for many shoppers in many categories, the single most powerful impetus to buy is someone else's endorsement.

Google is so convinced of this that we created the +1 button, which lets anyone recommend products, services and websites to friends with a single click. While looking at a website or even at search results, you click the "+1" button to tell your friends, "I'm a fan of this." Next time your friends search, they will see your recommendation below the search result for that page. You become part of their ZMOT.

A kind of super-value is created when search and social media are combined this way. It's classic word of mouth, like asking friends if they've visited Mount Rushmore or if they know a good place to stay in Lake Tahoe.

Figure 4-1: Example of Google's +1 button in search results



Source: +1 as illustrated on the Google Official Google Blog on 3/30/11

But it's word of mouth that you can find exactly when you need it. You don't have to comb through emails or hope you can find the right friend at the right moment. If I search for a hotel online and six of my friends have given it a "+1," my decision is made.

* * *

Let me make another point about ratings and reviews online: They're a tremendous resource for customers, but they're also a tremendous resource for businesses.

"ZMOT is an incredible source of insight for brands to really understand how satisfied their customers are on a real-time basis," says Brett Hurt.

"You can see what people are saying to each other about your product every day, which is a totally different idea than a survey. It's like I went to a market research firm and said, 'I don't want to just survey the general public about my product; I want the people who are likely to talk about it and express a strong opinion.'

"A focus group is artificial. People are paid to be there. They know that there are agency people behind the glass watching them," he says. "The only thing that's pure and

authentic in terms of what's actually happening in the marketplace is how people talk to each other.

"For businesses, ZMOT has evolved from a simple, 'I need to increase my sales online,' to a holistic approach of, 'Oh my gosh, I can actually be better informed than I've ever been before about marketing and merchandising.' An observant product manager can find out precisely why they've been getting a high return rate or why they've been getting high sales."

A machine that lets you know exactly what your customers are thinking as they make product decisions? That shows what they want and need from you? And even lets you reply to them if you want? What a concept.

Except it's no longer a concept — it's how people actually share today at ZMOT.

EQUAL THOUGHT, NOT AFTERTHOUGHT

CHAPTER

5

EQUAL THOUGHT, NOT AFTERTHOUGHT

"What we face now is a pace of change that is unprecedented. Major innovations that used to change our lifestyles maybe once or twice in a generation, we're seeing that now almost on an annual basis.

So what needs to be top of mind for all marketers, no matter how established their brand is, is to stay relevant among our consumers.

We have to think about how the lives of our end users are changing, whether that end user is a consumer, a patient, a doctor or anyone else. And to remain relevant we need to be part of their new ecosystem."

— Kim Kadlec
Worldwide Vice President
Global Marketing Group
Johnson & Johnson

If there's one truth I'd like you to take away from this book, it's this: ZMOT must be an equal thought, not an afterthought.

Remember the plate-spinning acrobats you used to see at the circus? If you're a business owner or brand manager, you've always had three plates to keep spinning: stimulus, shelf and experience.

I'm here to tell you that ZMOT is a fourth plate. It's just as important as the other three. And in fact, it can help you keep those other three plates in the air.

There are certain objections to ZMOT that we hear all the time. Let me share a few with you.

"Nobody looks online for toothpaste or paper clips."

Really? Tell that to 3M. In the first year after they started taking website comments about Scotch Tape, they got almost

3,000 comments from users. Comments like this:

> *I use this tape all the time because it holds the things I want to hold together without being seen. I have used this product for years and will continue using it for many more years.*

Yes, people take the time to leave messages online about how much they love Scotch Tape.

That's because the effort is down to zero. You would never get in your car, drive to the library and walk up to the second floor and ask a sleepy librarian for *Consumer Reports* before buying a 39-cent ballpoint pen. The effort and the item are imbalanced. But now there's no friction. You can pull out your mobile phone and look it up — or leave your own opinion — on the fly.

When I go to a presentation at, say, a Hilton Hotel, I tell the audience this: "There are more reviews online for the Bounce Dryer Bar than there are for the hotel we're sitting in right now." It always startles people, and it's always true.

ZMOT is not just for vacations and cars and refrigerators. It's for a $5.99 bottle of dandruff shampoo or a $3.29 box of cereal or that 39-cent pen. People like to learn about and participate with all the products they use. Believe me, your great product is no different. Consumers have learned to apply the strategies they've used for buying cars and refrigerators to everyday items.

"It doesn't apply to my industry."

Classic objection.

Beth Comstock, the senior vice president and chief marketing officer of General Electric, has a pretty good perspective on this, since GE makes everything from light bulbs to jet engines. She says:

> *Maybe if you make locomotives, or the software that automates production lines, you think: Why should I have videos or web content out there? Who's going to use that?*
>
> *But one day at our marketing council we did YouTube searches for just those kinds of things. And you know what? Up came hundreds of videos, including videos from our competitors on things like intelligent thinking for production line automation. It was a great eye-opener. I think we could have entered any topic and found the same thing.*
>
> *We've seen enough data to know that C-level executives do their own search queries for research before they ever meet with potential suppliers. Whether you're buying a new refrigerator or a jet engine, you want to do your homework in advance.*

If you're not visible online when people are doing that homework, believe me, they'll find others who are. Here's what Brian Dunn, the CEO of Best Buy, told RetailGeek.com

in 2011: "We know that 60% of our U.S. store sales are influenced by our customers' experience on BestBuy.com."

That percentage is not unusual. The numbers are high for beverages, school supplies and any other goods you normally wouldn't order online.

If you're a local pizza shop or electronics store, it's even more critical that you be available at ZMOT. It's where people are going to find you today. You might be surprised to hear that 20% of searches across all Google properties are local. That's not all: that number doubles to an amazing 40% for mobile searches.[1]

We recently ran a test across four major food brands with a research partner, SymphonyIRI. For each brand, we chose a test market where we showed no ads. In a matching market, where conditions were equal, we turned on search. The results? Markets where consumers could see search ads had an average +3.1% lift in in-store volume sales.[2] A 3.1% lift in a category that is usually flat!

And ZMOT is certainly not just for groceries and consumer packaged goods. Our Shopper Sciences survey showed just how widespread ZMOT is in all categories as shoppers make decisions:

Figure 5-1: Cross-category chart

Category Purchased	Number of sources used by the typical shopper	Average usage across sources	% of shoppers influenced at ZMOT
Automotive	18.2	34%	97%
Technology (Consumer Electrionics)	14.8	30%	92%
Voters	14.7	35%	95%
Travel	10.2	22%	99%
Over-the-Counter Health	9.8	18%	78%
Consumer Packaged Goods: Grocery	7.3	15%	61%
Consumer Packaged Goods: Health/Beauty/Personal Care	7	14%	63%
Quick-Serve Restaurants	5.8	12%	72%
Banking	10.8	25%	91%
Insurance	11.7	26%	94%
Credit Card	8.6	19%	81%
Investments	8.9	20%	89%

Source: Google/Shopper Sciences, Zero Moment of Truth Industry Studies, U.S., April 2011
Sample sizes for each category noted in appendix Figure A-10.

When 95% of voters and 99% of travelers are being influenced, I think we can safely say that ZMOT spans all industries.

"Moms are too busy. They don't have time for this kind of thing."

I hear this one quite often. To which I say: Are you kidding me? Moms are black belts at ZMOT! It's because today's moms and dads are busy and budget-crunched that they go online as they make decisions. Who has time to stand in the aisle in front of 32 feet of vitamins and read the backs of all the labels to find the right one? Today's moms are looking online for recipes, they're comparison-shopping for cheaper brands, they're checking out what their friends recommend.

Mark Addicks, the senior vice president and chief marketing officer for General Mills, puts it this way:

> *There are certain times of day when we see consumers come to our sites — when they are literally trying to figure out, "What's for dinner tonight?" At stores, you can see moms running in around four o'clock. Our research team has stood in grocery stores and watched this happen. Moms go straight to the meat counter — "I know I need beef" — and that's when they pull out the phone and start looking online. They're checking recipes, or they're eyeing a value pack and thinking, 'What else can I make this week using hamburger?'*

Tina Sharkey of BabyCenter argues that moms are actually more likely to go online than almost anybody else.

When we studied the inflection points in a woman's life where she might start using social media, and begin using social media in a much more engaged way, becoming a mom far outweighed any other life event. Women have deep, deep sharing habits: product reviews, articles they're forwarding, conversations, discussion boards, being engaged and being advocates in all kinds of ways.

Sure, maybe years ago homemakers would wait for magazines to come once a month in the mail, and that's how they got messages from advertisers. But now they're in command, and it's minute by minute, not month by month. They start the conversation with advertisers when they're ready for it.

"We already have a website. We're doing fine."

This reminds me of a dozen years ago, when some marketers had to fight to convince CEOs that they needed a website in the first place. Turns out a website is a pretty useful thing.

"A successful business is the hardest organization to change," as Prof. Jerry Wind likes to say. Now the world is changing again, and yes, your successful business needs to change.

That's true whether you're a billion-dollar firm or a local storefront cafe. "If we hadn't embraced ZMOT we would not exist today as a business," Maria Baugh told me. The shop she co-owns, Butter Lane Cupcakes, makes and sells outstanding cupcakes in New York City. "There's simply no way to succeed, really, if we're going to rely on foot traffic and just our one little storefront.

"We ask people how they find out about Butter Lane Cupcakes, and a lot of people find out about us on Yelp, a lot of people find out about us through Google AdWords, tons of food bloggers, tons of people going online. It's like built-in marketing and a built-in consumer base."

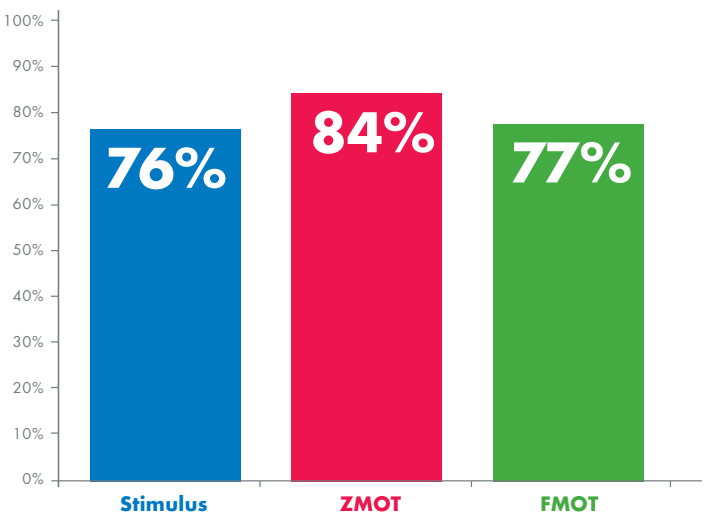
She adds, "We regularly make course corrections based on customer feedback. We decided that we needed to greet customers within five seconds or 10 seconds of them walking in the door. And that's something we picked up on just by listening to what people were saying about us.

"It's not just a nice thing to be able to do, it's not just something that's out there that you can take advantage if you want to. It is absolutely crucial, particularly for a boutique business."

* * *

Let's go back to the Shopper Sciences data I mentioned earlier:

Figure 5-2: Sources used by net type



Q2 When you were considering purchasing [PRODUCT] what sources of information did you seek out to help with your decision?

Base N=5,003

Source: Google/Shopper Sciences, Zero Moment of Truth Macro Study, U.S., April 2011

This is what I mean about equal thought. Shoppers today use ZMOT sources right along with the classic stimulus and FMOT sources. None of the three are going away. The more information available, the more the shopper seeks. It's a self-perpetuating cycle.

* * *

You'd never set up a corporate 1-800 number with nobody to answer the phone. (Would you?) You wouldn't build one and just let it ring.

The Internet is that 1-800 number, and it's been set up for you *even though you didn't ask for it*.

People are "calling" you with their web searches every minute of every day. Grandma doesn't just phone 1-800-Butterball now — she searches online for, "How do I know when the turkey's done?" If turkey is your business, you'd better be there with a helpful answer (and maybe a demonstration, or a coupon or a stuffing recipe). If people search for your product and you don't answer that search, who do you think will answer?

That's why I ask people: Do you have a plan to win the Zero Moment of Truth that's at the same strong level as your stimulus plan, your shelf plan and your product plan? Or is your plan to hope it turns out well for you? Because hope is not a plan!

Now let's talk about how to keep that new ZMOT plate spinning and winning.

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CHAPTER

6

HOW TO WIN AT ZMOT

"Betty Crocker got 4000–5000 letters a day in the 1940s, and we hired hundreds of people to send personal answers. In the 1960s we had 350,000 people join the Bisquick Recipe Club. That was 'social media' before social media existed.

With the new online and digital tools we've got now, General Mills has picked right up where our 'foremarketers' were then. It's all at our fingertips now."

— Mark Addicks
Senior Vice President and
Chief Marketing Officer
General Mills

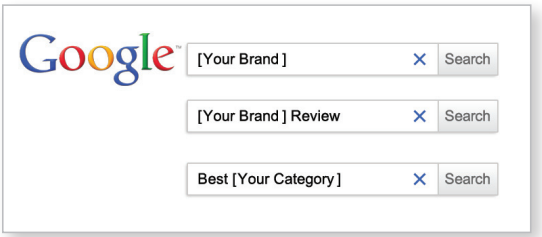
I love that quote that Mark Addicks shared with me, because it really gets at the heart of how ZMOT is a brand new part of a grand old tradition.

If you're ready to start winning at ZMOT, here are four questions to kick-start the process:

- When you start typing your product name into a search engine, but before you finish, what search terms fill in automatically below?
- Does your website or your message appear on the top third of the first results page for those searches?
- How does your brand appear on the key ratings and review sites for your category?
- If someone searches for key phrases from your TV ads, what do they see?

Now, one more thing. Try your brand name with these three searches:

Figure 6-1: Search exercise



The answers to those questions, and the results you see on these searches, will show you where you stand now at ZMOT.

I work with a lot of companies in my job, and I've noticed that the ones that are succeeding at ZMOT share a few powerful ideas and strategies. In this chapter I'll talk about those ideas, and I'll also describe some tools that can help you plan your own strategies and measure your success. If many of them are Google tools, I hope you'll forgive me. We've spent a lot of time thinking about ZMOT at Google, and these are naturally the solutions I'm excited about and know best. (And most are free.) But of course there are plenty of other great tools out there.

So, let's talk about seven smart ways to start winning at ZMOT right now:

1. Put Someone in Charge
2. Find Your Zero Moments
3. Answer the Questions People Are Asking
4. Optimize for ZMOT
5. Be Fast
6. Don't Forget Video
7. Jump In!

1. Put Someone in Charge

If I'm having this conversation privately with a CMO, this is the first question I ask: "Who's in charge of ZMOT for you?"

Because if it's nobody's job, it's not going to get done. If I ask you, "Who runs your TV department?" or "Who's in charge of your in-store marketing for FMOT?" or "Who makes sure your green beans reach the shelf on time?", you'll give me one person's name. You also should be able to give me one person's name for ZMOT.

That person should be ready and empowered to work with your various agencies — creative, strategy, media and digital — rather than being hidden in a lonely cubicle down the hall. They should be in meetings when you plan strategy. And they should have a say in the overall experience for your customers. (As we'll see below, they must be able to work fast.)

While you're at it, ask yourself: Do I have a budget for the Zero Moment of Truth? Or do I just have a website budget? Because your new ZMOT leader can't do it all with smoke and keywords.

To put ZMOT to work for you, put someone in charge.

2. Find Your Zero Moments

What are the Zero Moments of Truth for your product, category and brand? The ZMOT for jet engines is different from the ZMOT for corn flakes or online dating. You and your team need to understand exactly how people search for your product.

At the start of this chapter I suggested you enter your product name into a search box and see which related search terms appear as you type. (All the major search engines have this auto-fill function.) The searches you see there will be the most popular ones for your product name. If you enter "golf shoes" and see that the popular searches are "golf shoes for women," "golf shoes clearance" and "golf shoe reviews," you'll start to see where the Zero Moments are for your product.

Next, you'll want to consult a tool that can tell you more about related terms and their popularity. All search engines have tools that can show you relative search phrases around a topic and how popular each of those searches are. Google's is called the **Keyword Tool**, and it's free. Enter "potato chips" and you'll see dozens of variations, from "sweet potato chips" (18,000 searches a month) to international variations like "crisps" (246,000 searches a month) to related searches like pretzels and tortilla chips.[1] "Tortilla chip recipes" — chip makers, that's your ZMOT!

That's just the start. Type in the URL of your website and the tool will analyze the content on all of your website pages, look through all the search queries done by real users in the last 30 days and find the ones that match your business. Then it will give you a specific targeted list of keywords that actual people used and show you your share of the organic search and paid search impressions.

The real ninjas of ZMOT grab those related searches and do fresh searches, creating growing circles of relative terms. This is a challenge for one of the cleverest members of your team — it takes both determination and art. But that person can be a ZMOT superhero as they spot the user data that will put your business in the right pace, at the right time, with the right message.

Know your Zero Moment and you'll be on your way to winning at ZMOT.

3. Answer the Questions People Are Asking

Here's a problem I see a lot: I search for something like "what are the ingredients in dog food?" And what I get back are ads and links from pet food companies that say: "Get $2.00 off our dog food!"

Now, who asked about money? Not me! I'm still looking for information.

So this is a classic Zero Moment fail. I'm looking for product details, and what I get back is basically a bribe: "Who cares about the ingredients — take two bucks off!"

Don't get me wrong: Online coupons can be powerful. But not when the question was something else entirely. If you sell dog food, you should have a landing page and an ad campaign for ingredient and nutritional questions, and for any other question you know people are asking. That landing page can take the question head on, make a pitch for your own product… and *then* you can offer the two bucks off.

How do you discover which questions people are asking right now? You'll find tools all over the web that can help with this. Here are two free ones from my company:

Google Trends tells you what searches are hot right now or in the last few days. You can see charts showing popular search trends for the last 24 hours, 30 days and beyond. Enter your business name or any other search term and you can see how it's been trending around the world.

The **Insights for Search** tool is not quite as up-to-the-moment as Trends, but it shows you more detail about searches specifically related to your business. Enter a product name and you can see rising related searches, states and cities where those searches are hot, and quite a lot more. If you make cast-iron widgets, and "new titanium widgets" has been a hot search in the last month, you'll find that here.

Analytics tools like WebTrends and Adobe's Omniture (and Google Analytics!) come with standard built-in capabilities that will show if you're answering the right questions on your website specifically. For instance, consider that delightful metric called Bounce Rate. It measures the percentage of people who see only one page of your site — people who arrive, look and leave.

Find the pages on your site with high bounce rates: As a general rule, you want a bounce rate under 30%. That means only three out of 10 people you've brought to the site leave instantly. A higher rate means you have a big gap between what people are expecting when they come to that page and what they find when they get there. Lower that rate and you'll know you're answering your customers' questions.

Remember, too, that a lot of different questions get asked. The average shopper uses more than 10 sources of information to make a decision, after all.[2] Remember the motivations we talked about earlier: saving time, saving money and finding the best product. The questions you need to answer will often line up with those motivations.

At ZMOT, it's not enough just to know the questions people are asking. You've got to answer them.

4. Optimize for ZMOT

So: You know your brand's ZMOTs and You know the questions being asked and you know where you're showing up.

The next question, of course, is: How do you show up *more*?

It's time to start thinking creatively. I talked with David Almacy, the former White House Internet director for President George W. Bush, and he told me a great story:

> *This is one of the best search engine optimization tales I've ever heard. In the midst of the health care debate, the Obama White House started monitoring what questions people were asking online about the health care bill.*
>
> *And they determined that the #1 most searched question was simply, 'What's in the health care bill?' So they actually drafted a blog post for the White*

> *House website and titled it, exactly, 'What's in the health care bill?'*
>
> *It worked! During the heat of the debate, if you searched for that phrase, the #1 link that came up was to that blog post on WhiteHouse.gov, which specifically laid out the President's plans around health care.*
>
> *What I love about that story is that you have a team who understood how the web works, how people use the web to seek information, and they used their website to their own advantage. And the best part is that it cost nothing. It cost nothing other than the time it took to actually have that person type up that blog post.*

Last I checked, by the way, the White House post was still top-ranked for that search phrase.

Consumer stimulus no longer has to come from you, and at ZMOT a lot of the time it probably won't. A great stimulus opportunity can come from a news story, a public issue, even a competitor's ad.

"The days of controlling the message are absolutely over. At best you'll be invited in and you'll get to co-create and participate with consumers." So says Wendy Clark. She knows a little about the topic: she's senior vice president for integrated marketing communications and capabilities for The Coca-Cola Company.

As Wendy notes, you have to adjust your content for all three traditional parts of the conversation: paid, owned and earned. And she adds a fourth: shared.

Paid is the advertising and media you drive and pay for yourself.

Owned is the assets your company controls that you can use to promote and reinforce your brand. In Coke's case, they have their packaging (a mere 1.7 billion servings daily) and a fleet of delivery trucks that can be used as communications media.

Earned takes us back to the ratings and reviews and social media we were talking about earlier: Are people inspired to talk about your product? And if so, what are they saying? Coke has hundreds of thousands of followers on Twitter and millions of fans on Facebook, and together those users have a personal network that is magnitudes bigger.

Shared is areas you may not control directly but where your brand can be featured and promoted, like at the point of sale and, in Coke's case, in McDonald's restaurants.

This is where ZMOT can help you really make an impact, even if you don't have 1.7 billion servings a day. (Yet.) Are you paying attention to how customers pass your message among themselves? Are you creating engaging and sharable content yourself? If you're a local business, are you working with products like FourSquare and Google Places that can help your customers spread that earned love?

And are you thinking about mobile? It's not "the wave of the future" any more — it's right now.

Google did a survey in 2010 and discovered (somewhat to our shock) that only 21% of our top advertisers had mobile-optimized websites.[3] The other 79% didn't. In my mind, those numbers should be flipped.

Just because you can see your site on a smartphone doesn't mean it's easy to navigate and use. Try calling your site up on your own mobile device right now. Do you have to tap and pinch and zoom a lot? Can you find things easily? What are the key actions that mobile shoppers and researchers will want to take on your site? Get a quote? Look at product information? Those things should be easily available in a format that suits a small screen and big fingers.

Here are some specific tips for mobile, based in part on some data gathering we've done in the past year:

- Run and track mobile separately from your other campaigns. Don't muddy the waters. Mobile-only campaigns perform 11.5% better on average than hybrid desktop-mobile campaigns.[4]
- First position matters even more in mobile. That's true whether you're talking about search results or ad positions. The digital shelf gets really small on the mobile screen! A drop from first to fourth position on mobile phone can mean a CTR drop off of more than 90%.[5]
- Use device targeting. Did you know that we've created several different versions of the book you're reading right now? Each is designed to suit a particular device. In the online world, it's not hard to identify the type of device someone is using and deliver the right format for the ultimate ZMOT reading experience — then track usage on the back end to tell which device is most popular and performing the best.

"Iterate, iterate, iterate," says Lisa Gevelber, the director of marketing for the Americas at Google. "Data beats opinions, and that's a key rule for mobile, desktop and any other ZMOT campaign. Try something new, track results closely, then crank up what works and turn off what doesn't. That's the beauty of online: You can change and fix things in a flash."

Optimizing your content for ZMOT is an ongoing process, not a one-shot deal. And the rewards are well worth it.

5. Be Fast

In the world of ZMOT, speed beats perfection.

You can't go in with the classic mindset of the big annual marketing plan with rollouts planned 12 months in advance. You have to be faster and more flexible than that.

Here's an example I use a lot: The day after Lady Gaga released the video for her song "Telephone," we suddenly began to see searches for terms like "Beyonce yellow

eye shadow" and "Beyonce honey bee yellow makeup." Because two-thirds of the way through that nine-minute video, Beyoncé showed up in one scene wearing a yellow dress, yellow cowboy hat… and yellow eye shadow.

Now, if you sell eye shadow, would you like to be there when those searches are happening? I think you would. Before shoppers even walk down their store's cosmetics aisle, they're saying, "I want this look. Help me get it!" But you have to be ready to act fast and jump in with content those customers can find immediately.

Here's a terrific example of ZMOT speed in action: Miracle Whip® Dressing. Stephen Colbert did a report making fun of the sandwich spread on his show *The Colbert Report* in the fall of 2009. The team at Miracle Whip responded with admirable moxie, turning Colbert's slam into a funny mayo-vs-Miracle Whip war. Suddenly people who searched for Colbert's name (or for Miracle Whip) found online ads that said, "Colbert can't handle Miracle Whip's great taste! Which side are you on?"

These funny ZMOT ads sent viewers to web pages and videos the company had created, reinforcing the Miracle Whip message: "We will not tone it down!" Next, the Miracle Whip team published an open letter to Colbert in newspapers across the country, and also acted quickly by customizing three TV ads directed to the host during his own show.

The "war" went viral. Even today, searches like "Stephen Colbert Miracle Whip" turn up dozens of great stories and blog posts about the controversy. ZMOT win: Miracle Whip.

Act fast and you'll have a big leg up at ZMOT.

6. Don't Forget Video

Know what the second-most-used search box in the world is? It's the one on YouTube.[6]

A huge portion of ZMOT is visual now. Mobile phones can show and take video, after all. You need to be ready and waiting with video for your customers.

When I talk to big industrial companies, I often invite them to stump me by tossing out unusual topics for a video search — maybe "semiconductor diodes" or "mixing cement." And whatever the topic, 10 times out of 10 we find a bunch of videos about it. You'd be surprised how many thousands of people will watch a video on semiconductors or cement, or pain relievers or proper weight lifting.

Brand consumers are usually looking for two kinds of videos:

- Product showcases and demos
- How-tos and expert advice

For B2B brands, you'll also want to consider:

- Case studies
- Thought leadership

These kinds of videos can be big-budget productions or they can be simple one-on-one affairs with a team member (or you!) and a camera. You may have heard about Gary Vaynerchuk, who turned a New Jersey wine shop called The Wine Library into a sensation, simply by doing one short video about wine every day from the back of his shop. He's been featured in *The Wall Street Journal* and *The New York Times*, he's been on Conan O'Brien and Ellen Degeneres and Jim Cramer, and it's all thanks to his videos. In fact, if you search for "wine videos" on Google today, he's the #1 result. He's winning at ZMOT with video. Your team could be doing the same.

Video has one other big advantage: the "look at this!" factor. Video is wonderfully easy to share through email, post to social networks, or embed on blogs and web pages. It's just a great way to get attention for your product. With that in mind, it's a good idea to make sure your video is easy for customers to pass on to one another.

When it comes to video advertising at ZMOT, you can score some good, quick points by taking your TV ads and putting them online. When we looked at 32 different campaigns that ran on YouTube in Germany in 2009 and 2010, we found that YouTube added 3.4 percentage points of incremental reach to the reach of TV. We found that 64% of the users who saw an ad on YouTube had not seen the campaign on TV. So these are new users! The overlap between users exposed to the same ad on TV and YouTube was only 1.9%.[7]

But you should also think hard about creative that's built for online video. Online users have a different mindset — they want snacklets! Fifteen to 30 seconds is often the right size. And people aren't always interested in watching online what they just watched on a TV screen. They'll be looking for more: backstage views, commentary or things that are often left on the cutting-room floor. I know you have all those good things, so why not use them?

I've said that ZMOT has to be an equal thought in your marketing plan. Well, within ZMOT, video has to be an equal thought, too.

7. Jump In

"Showing up is 80% of life."

— Woody Allen[8]

Who'd have thought Woody Allen would have something to say about ZMOT?

The beauty of the online world is this: You can jump right in. And the beauty of ZMOT is that the best way to succeed IS to jump right in. You don't need a committee and you don't need a five-year plan. You just need the knowledge that it can be a huge win for your business, and a willingness to be daring, have fun and try new things.

The businesses who do well at ZMOT are the ones that iterate, as Lisa Gevelber says: test, learn, optimize, then try again. "Fail faster" — that's how my colleague Avinash Kaushik likes to put it. Speed the whole cycle up. The faster you fail, the faster you learn what works. Treat your online marketing campaigns as if they're always in beta.

When you put someone in charge of ZMOT, as I suggested earlier, make sure they're the kind of self-starter who likes to attack a problem. And make sure you give them the power and freedom to jump in and act right away.

One More Thought

That makes seven steps, some simple and some a little more complex. Follow them all and you'll be well on your way to success at ZMOT.

Now I have a challenge for you: Over the next couple days, pay attention to your own buying decisions and research. How do you make those choices? Bet you'll be surprised how often you find yourself at ZMOT. While you're there, think about how your own customers will be looking for you in the same ways.

Now jump in!

MOTS NEXT?

CHAPTER

7

MOTS NEXT?

"We're about to see a merging of all the moments of truth. You'll be looking at a product on the shelf and using your cell phone to find information and read reviews and then maybe you decide it's really cool, so you 'like' it for your friends, all within a minute.

A consumer journey that once covered days, weeks or months just happened in a matter of seconds."

— Matt Moog
Founder and CEO
ViewPoints Network

What an exciting time to be a marketer.

The world is changing at an incredibly fast pace. Lorraine Twohill, Google's global CMO, shares these telling numbers:

Ten years ago, less than 2% of the population was online. Now that number is over 25% globally, and close to 100% in many countries. Two-thirds of the world's population has mobile phones. By 2020, 5 billion people will be on the web — and 10 billion people will have mobile phones.

In this transformational future, consumers have access to ZMOT everywhere, in real time. Consumers search and find ratings, reviews, ads, videos and word of mouth, and add their own thoughts and opinions right on the spot — wherever their spot happens to be.

And frankly, we're most of the way to that future already.

Mobile Is an Accelerant

Don't let anyone tell you mobile is "the future." It's already here. Lorraine Twohill gave me a great statistic on this: Two-thirds of us sleep with our mobile phones right beside us.[1] So that's around 3.3 billion people who have cellphones with them day *and* night.

The way we use those mobile phones will keep changing. With GPS technology, location-based services for local businesses will be off the charts. And who knows what the next killer app will be? Phones that read bar codes are triggering ZMOT moments for more and more shoppers, says Matt Moog of Viewpoints Network:

> *When shoppers have a bar code scanner in their pocket, with one click they can unlock everything they want to know: which of their friends like these products, what the ingredients are, other use cases for the products, the science and content and details behind the product. You can't underestimate how people are going to use that.*

And as consumers unlock information, they'll add their own data and opinions to the conversation on their own sites and blogs, on social networks and on new features no one has imagined yet. Simply put, mobile phones are MOT machines.

The Meeting of the MOTs

I said earlier that the sales funnel is turning into something less linear — more like a neuron with impulses going in all directions. Those impulses are firing faster and faster. For consumers, the Zero, First and Second Moments of Truth are growing closer by the minute.

The most obvious example is that moment at the store shelf: the one where you're discovering, making decisions, buying and sharing what you learned all at once. But the same thing happens every day now, in all parts of life.

Let's say I'm going on vacation and I need a hotel. I go online to scope the possibilities. (ZMOT!) While I'm there I read reviews from others who have stayed at the same hotel (their SMOT, my ZMOT) and look at maps of hotel locations. Finally I narrow it down to two choices and go to the websites to see photos and check rates (FMOT) before I make a reservation online.

My family and I go on the trip, have a great time (SMOT), and on the last day we get to the airport a little early and have an hour to kill. So I grab my mobile phone and post my own hotel review on TripAdvisor. Before I even catch the plane home, my SMOT is becoming someone else's ZMOT. One MOT leads to another.

The Rise of Video

Today's young adults have had mobile-phone cameras in their pockets since they were old enough to have pockets. They're perfectly comfortable using video to tell each other about the products in their lives. If markets are conversations, as Doc Searls said in The Cluetrain Manifesto, those conversations are looking a lot more like movies.

ZMOT is actually turning visual on all fronts, as Mark Addicks of General Mills points out:

> *We may come to a place where you show the shopper the end result and they can deconstruct it themselves right there.*
>
> *Let's say my 6-year-old's birthday is coming up and I have very limited time. I know my daughter is crazy about Disney princesses, so maybe I search online real quick for 'princess birthday party.' And what I ought to find is a video I can look at in under two minutes and say, yes, I can make that. I can do that. That sounds fun.*

And then we can serve up additional content to that shopper. Need decorations? What do the invitations look like? What do we do during the party? All this happens before any traditional media hits — this happens on the shopper's schedule, on her time.

If you're a marketer, I hope you're encouraging your customers to make videos about your product that others can find at the Zero Moment of Truth. Never forget that your customers are ahead of you, and they're ready to contribute right back to ZMOT in real time.

Beyond the Shelf

By 2020 we'll be connecting at speeds of one gigabyte per second. That's 500 times faster than current speeds in the U.S., and about 2,000 times faster than the Wi-Fi in the hotel I stayed in last night. Sound far-fetched? South Korea will actually hit those speeds in 2012.[2]

That kind of speed is going to change the game for living and for marketing everywhere: in business, in education, in politics, you name it. How can marketers keep up?

"Say yes." That's one of Lorraine Twohill's favorite sayings, and I love it. It's always easy to be cautious and say "no." But ideas come from everywhere now. Embrace that! Say yes as often as possible. Be nimble. Take risks, try new things, learn and be surprised.

Which major company will be the first to name a director of ZMOT? Which business school will have the first ZMOT course? Who will open the first Zero Moment agency? The future belongs to marketers who recognize the power of ZMOT, staff for it, even reorganize for it.

Kim Kadlec of Johnson & Johnson says it this way: "The traditional ad model is interrupting content, but the question now is: 'How do you become a part of the content?' How do you weave into somebody's experience in a way that's beneficial rather than detracting from that experience? That's the challenge and the opportunity."

The Next Generation

One night as I was working on this book I walked through our family room and my daughter was playing a new Nintendo game she got called Scribblenauts. Later on I came back and she was still playing it.

So I watched her awhile and then I asked her, "Where'd you hear about this game?" She said, "I saw a commercial and it looked fun, so I looked it up on my phone. I saw it was a puzzle game and it got a good rating, so I used some of my gift card money to buy it at the store."

I feel pretty sure she wasn't just saying that to get mentioned in this book. For the next generation, ZMOT really is that simple.

The truth is, it's that simple for all of us.

All you need to do now is get your business into the conversation. Take risks. Say yes. Ask your team the question that we at Google ask clients every day: "Are you ready to win at the Zero Moment of Truth?"

KEEP IT GOING

Ready for more?

Join me at ZeroMomentOfTruth.com. I'll be tracking the latest buzz and new ideas from reporters, merchants, bloggers and (of course) marketers of all kinds. It's a one-stop shop for Zero Moment news, fresh perspectives and video interviews with contributors from every chapter of this book. And in the spirit of ZMOT, please join the conversation right on the site. I'd like to hear from you.

It really is an exciting time to be a marketer. I'll see you at ZMOT!

APPENDIX

APPENDIX

For ZMOT data lovers: This entire appendix has supplemental data on the Google/Shopper Sciences, Zero Moment of Truth Study, conducted in the U.S. and published in April 2011.

Study Objectives:

To determine on a macro and industry level how shoppers and consumers make decisions, by understanding three core components: 1) The average length of the decision-making purchase cycle, 2) the sources used to make their final decisions and 3) the influence each source had in those final decisions.

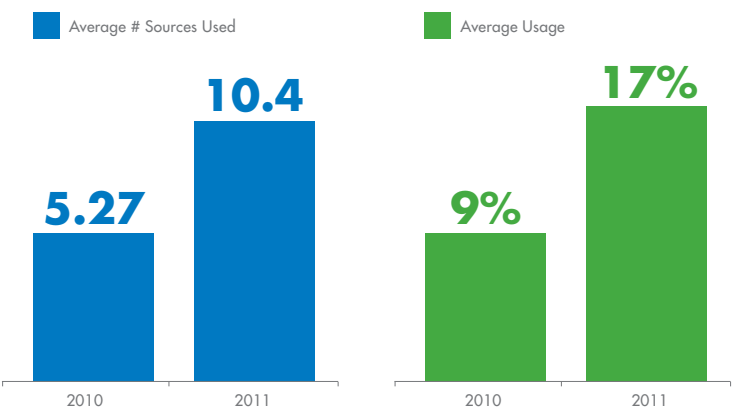
Methodology:

Shopper Sciences utilized an online survey to collect data from 5,000 shoppers. The survey technology incorporated the latest in Flash-based programming tools to create an interactive and engaging experience for the respondents. A quantitative analysis of decision-making behavior was conducted across shopping, services and voting. Data were collected across the following categories: Auto, Health, CPG Grocery, Health/Beauty/Personal Care, Consumer Tech, Travel, Restaurants, Credit Cards, Insurance, Investments, Banking and Public Election Candidate Selection. For category sample sizes, refer to Figure A-10.

Additional findings:

Shoppers are not replacing traditional source nodes with new source nodes. Rather, they are increasing their activity dramatically to accommodate new information.

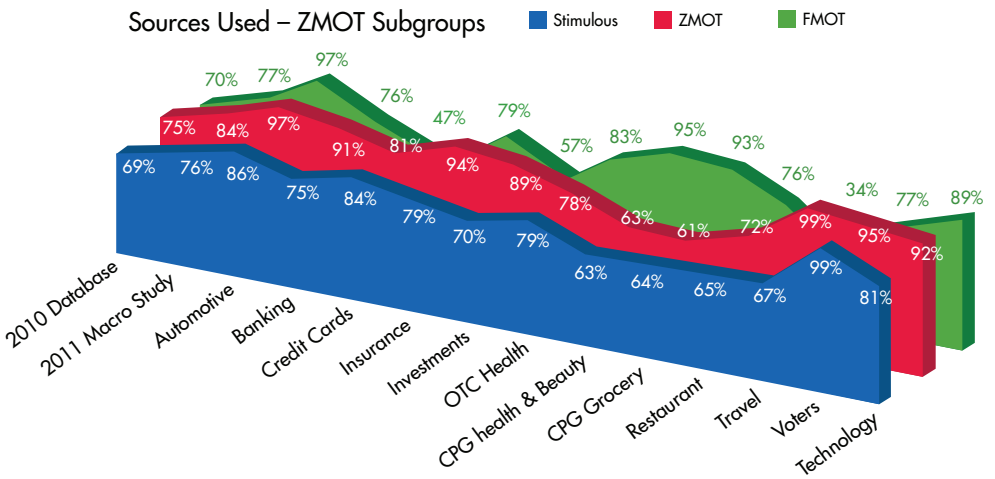
Figure A-1: Number of sources and usage



Source: Google/Shopper Sciences, Zero Moment of Truth Macro Study Industry Studies, U.S., April 2011

ZMOT has quickly become a leading source of information in most categories. FMOT is still quite a strong player for OTC Health, Health & Beauty, Grocery and Restaurant, but the 76% FMOT figure for Restaurant is the lowest Shopper Sciences has ever seen for that category compared to FMOT metrics in previous years.

Figure A-2: Sources used – occurrence of stimulus, ZMOT and FMOT by category



Q2 When you were considering purchasing [PRODUCT], what sources of information did you seek out to help with your decision?

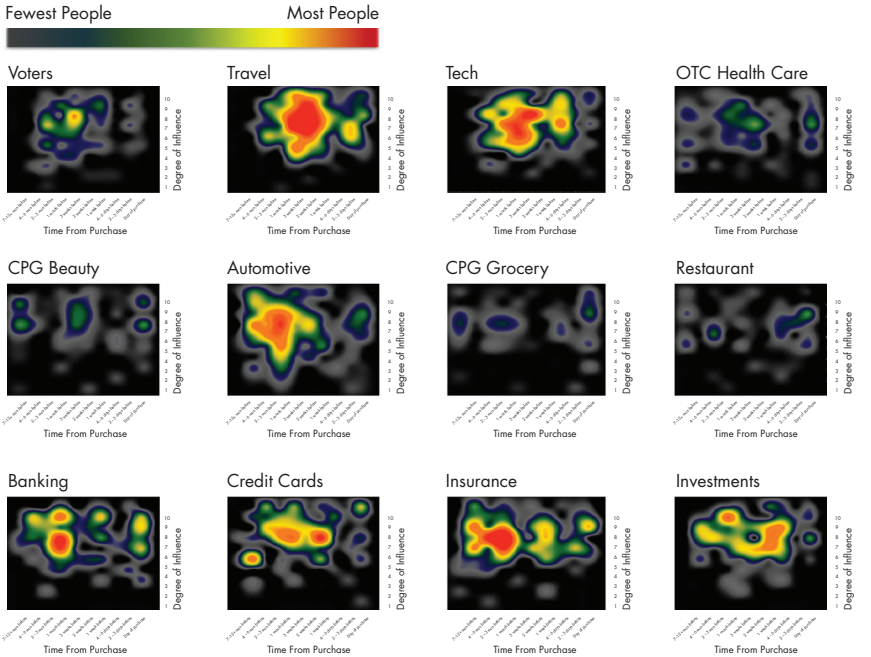
Base: N=5,003

Source: Google/Shopper Sciences, Zero Moment of Truth Macro and Industry Studies, U.S., April 2011
Sample sizes for each category noted in appendix Figure A-10

Heat Map Data

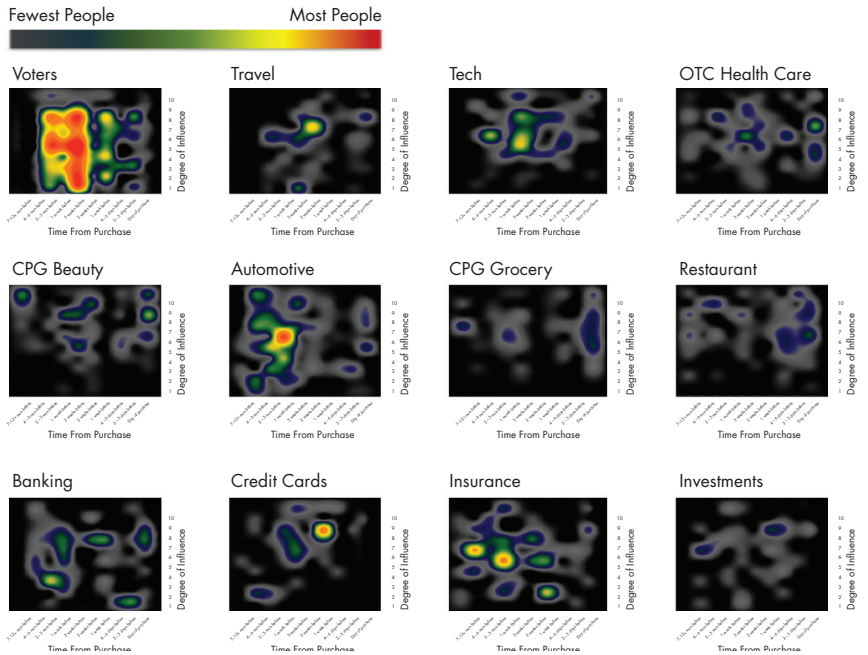
How to read the heat maps (Figure A-3 and A-4) on the following page: The timeline is noted on the X axis, left to right, to indicate the points during the path to purchase at which this source may be used. The size and brightness of the dot indicates how heavily the source is used. On the Y axis, the higher the dots are plotted, the more influential the source is at shaping the shopper's purchase decision.

Figure A-3: The influence of search engine usage by category



Source: Google/Shopper Sciences, Zero Moment of Truth Industry Studies, U.S., April 2011
Sample sizes for each category noted in appendix Figure A-10

Figure A-4: The influence of TV ads by category



Source: Google/Shopper Sciences, Zero Moment of Truth Industry Studies, U.S., April 2011
Sample sizes for each category noted in appendix Figure A-10

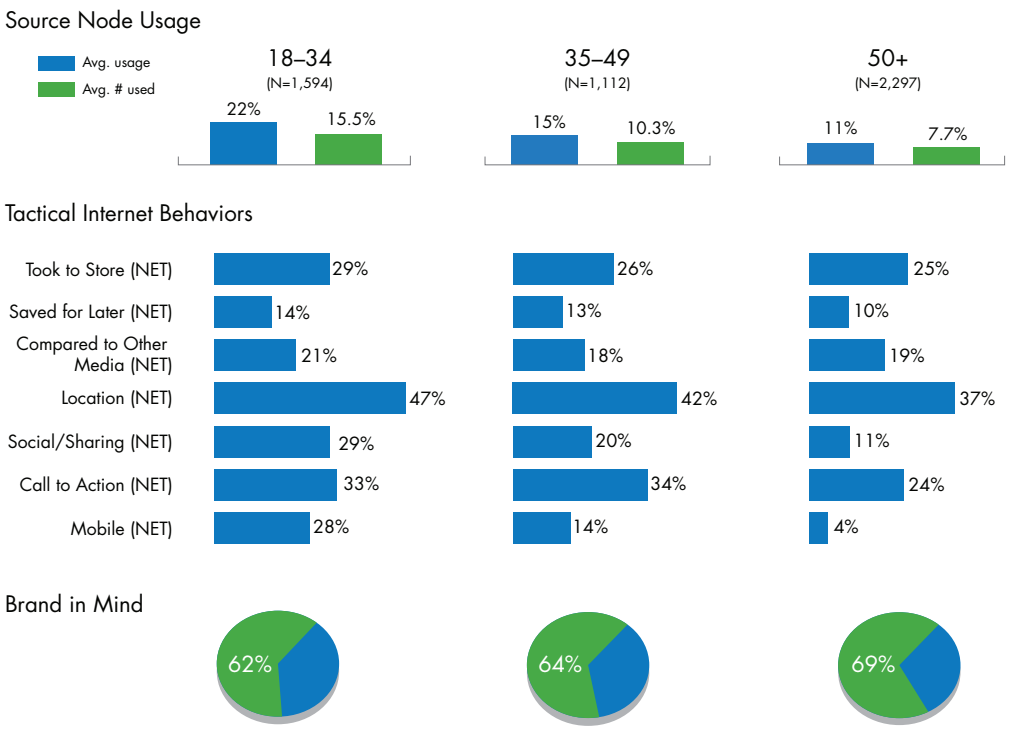
Younger shoppers used more sources on average, and were more likely to share their experience through SMOT and use the Internet to research their purchase.

Figure A-5: Stimulus, ZMOT, FMOT and SMOT by age group

Age	Stimulus	ZMOT	FMOT	SMOT
18–34 (N=1,594)	82%	91%	81%	70%
35–49 (N=1,112)	77%	85%	75%	62%
50+ (N=2,297)	72%	79%	76%	51%

Source: Google/Shopper Sciences, Zero Moment of Truth Macro Study, U.S., April 2011

Figure A-6: Source usage, tactical Internet and brand behavior by age group



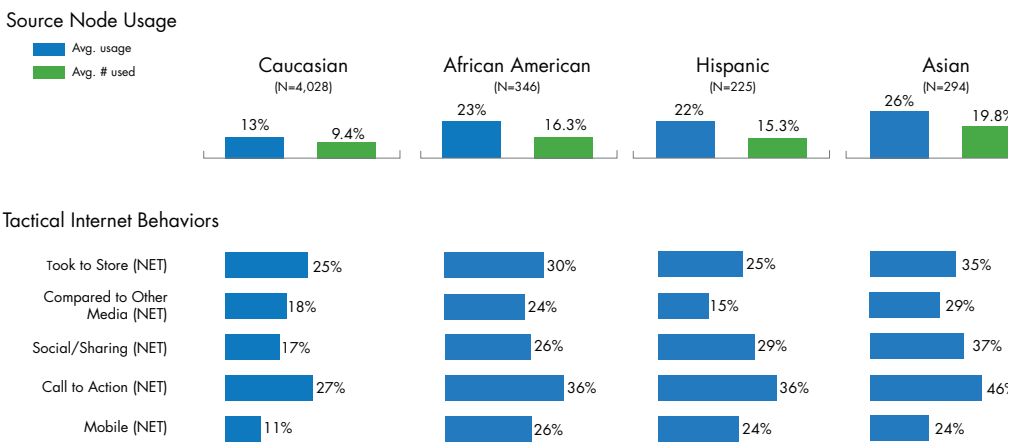
Source: Google/Shopper Sciences, Zero Moment of Truth Macro Study, U.S., April 2011

Figure A-7: Stimulus, ZMOT, FMOT and SMOT by demographic group

Demographic Group	Stimulus	ZMOT	FMOT	SMOT
General Population (N=5,003)	76%	84%	77%	59%
Caucasian (N=4,028)	74%	83%	76%	57%
African American (N=346)	87%	88%	88%	71%
Hispanic (N=225)	86%	87%	85%	73%
Asian (N=294)	89%	93%	84%	76%
Other (N=36)	72%	89%	70%	55%

Note: N=74 elected "Prefer Not to Say" for ethnicity question.
Source: Google/Shopper Sciences, Zero Moment of Truth Macro Study, U.S., April 2011

Figure A-8: Source usage and tactical Internet behavior by demographic group



Source: Google/Shopper Sciences, Zero Moment of Truth Macro Study, U.S., April 2011

Figure A-9: Definitions used for the Google/Shopper Sciences, Zero Moment of Truth Study conducted in the U.S., published April 2011

Stimulus
Noticed advertising while browsing online
Saw/tried product at the house of a friend/family member
This is a brand I grew up with
Looked at/read magazine advertisements
Saw an ad on an outdoor billboard
Read magazine articles/reviews/information
Saw an ad in a newspaper/newspaper insert
Read newspaper articles/reviews/information
Looked up brands/retailers in the Yellow Pages
Attended a show or event where product were featured
Received mail at home from a brand/manufacturer (e.g., catalogue, brochure)
Received mail at home from a store/retailer (e.g., catalogue, brochure)
Read information in an email received from a brand/manufacturer
Read information in an email received from a retailer/store
Tried a sample/experienced the product at a special event
Heard it discussed on the radio
Saw advertisements on television
Watched a TV show that featured the product

ZMOT (Zero Moment of Truth)
Talked with friends/family about the product
Searched online, used a search engine
Comparison shopped products online
Sought information from a product brand/manufacturer website
Read product reviews or endorsements online
Sought information from a retailer/store website
Read comments following an article/opinion piece online
Became a friend/follower/"liked" a brand
Watched videos about product online
Read/visited a blog that discussed product
Searched the web for information with my mobile phone before shopping
Talked to a customer service representative online
Searched the web for information with my mobile phone in the store
Saw product mentioned on a social networking website like Facebook
Received a referral notice from a friend online
Commented on a product mentioned on a social networking website like Facebook
Received a coupon or pricing information from someone on a social networking site
Commented on a blog that discussed product
Searched for a coupon with my mobile phone before shopping
Saw an ad/coupon sent to my mobile phone
Looked for coupons on a retailer/store website
Received a text from a brand/manufacturer on my mobile phone
Searched for a coupon with my mobile phone in the store
Looked for coupons on a product brand/manufacturer website
Participated in a chat or discussion online about product

Used my mobile phone to scan 2D barcode/QR code in the store
Read/visited a forum/message board about product
Talked to a customer service rep/salesperson via email
Commented on a forum/message board about product

FMOT (First Moment of Truth)
Tried a sample/experienced the product in a store
Talked with a salesperson or associate in the store
Talked with a customer service representative on the phone
Looked at the product package in the store
Read brochure/pamphlet about the product in the store
Used product coupon I got at the store
Used computer in the store to look up information on product
Used a loyalty card/frequent buyer card
Redeemed a gift card/rewards card

SMOT (Second Moment of Truth)
Mentioned it to friends/family
Mentioned it to a co-worker
Took a survey
Wrote a customer review on a website
Wrote about it on a Facebook page
Posted Tweets about it
Wrote about it in a blog

Figure A-10: Category shopper definitions and sample sizes

Category	Sample size of shoppers in study	Shopper definition – adults 18–70 who were the primary or shared decision-maker AND who:
Automotive	500	Purchased a new automobile in past 2 years
Technology (Consumer Electronics)	500	Purchased a personal technology item in past 2 months. Examples provided included computer, laptop, DVD player, Blu-Ray player, digital camera, mobile phone, iPad, TV, video camera, etc.
Voters	503	Registered U.S. voter who voted in the 2010 midterm elections
Travel	500	Purchased travel in past 6 months
Over-the-Counter Health	500	Purchased over-the-counter medication, vitamins or health supplements in past 30 days
Consumer Packaged Goods: Grocery	500	Purchased a grocery item in past 2 weeks
Consumer Packaged Goods: Health/Beauty/ Personal Care	500	Purchased a health or beauty or personal care product in the last 2 weeks. Examples provided included cosmetics, shampoo, deodorant, skin care, toothpaste, etc.
Restaurants	500	Visited a quick-serve or casual dining restaurant within the last 2 weeks
Banking	250	Switched to a new bank or opened a new bank account in the past 6 months
Credit Card	250	Applied for a new credit card in the past 6 months
Insurance	250	Purchased a new auto or home insurance policy or new life insurance policy in the past 6 months
Investments	250	Switched to a new investment firm, opened a new investment account or purchased/ traded stock/purchased a government bond or Treasury Bill in the past 6 months

END NOTES

Chapter 1
Changing the Rulebook

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2. Google/Shopper Sciences, Zero Moment of Truth Macro Study, U.S., April 2011
3. International Association of Athletic Federations

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ZMOT All Around Us

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2. Google internal data, 2010
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5. Google, Incremental Clicks Impact of Search Advertising Analysis, N=446 campaigns, Google, U.S. The analysis will be published late June 2011 and posted to research.google.com.
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Chapter 4
Rating and Reviews: Word of MOT

No end notes

Chapter 5
Equal Thought, Not Afterthought

1. Google internal data, May 2011
2. Search Matched Market Food Consortium Study, Google/SymphonyIRI, March 2010

Chapter 6
How to Win at ZMOT

1. Google Keyword Tool, April 2011
2. Google/Shopper Sciences, Zero Moment of Truth Macro Study, U.S., April 2011
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4. Google mobile internal data, 2011
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6. Can YouTube Rake in Google-Size Revenue?, AdAge.com, Feb. 1, 2010
7. YouTube Incremental Research Benchmark Study, Google, Germany, 2010
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MOTs Next?

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— *Jim Lecinski*

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Winning the Zero Moment of Truth

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