



# Data-driven insights for modern customer storytelling

Advocate Marketing Academy

March, 12 2024

Michael A. Johnson

Senior Customer Reference

Manager, Content Strategy



# More than 90% of the Fortune 500 use Red Hat products and solutions<sup>1</sup>



100%

of U.S. airlines in the Fortune 500 rely on Red Hat



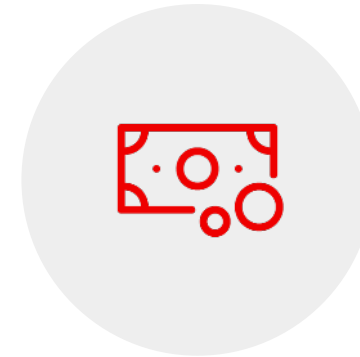
100%

of U.S. Executive Departments rely on Red Hat



100%

of U.S. telecommunications companies in the Fortune 500 rely on Red Hat



100%

of U.S. commercial banks in the Fortune 500 rely on Red Hat

# Our customers by industry

Financial services



Telecommunications



Oil and gas



Manufacturing



Government



Healthcare



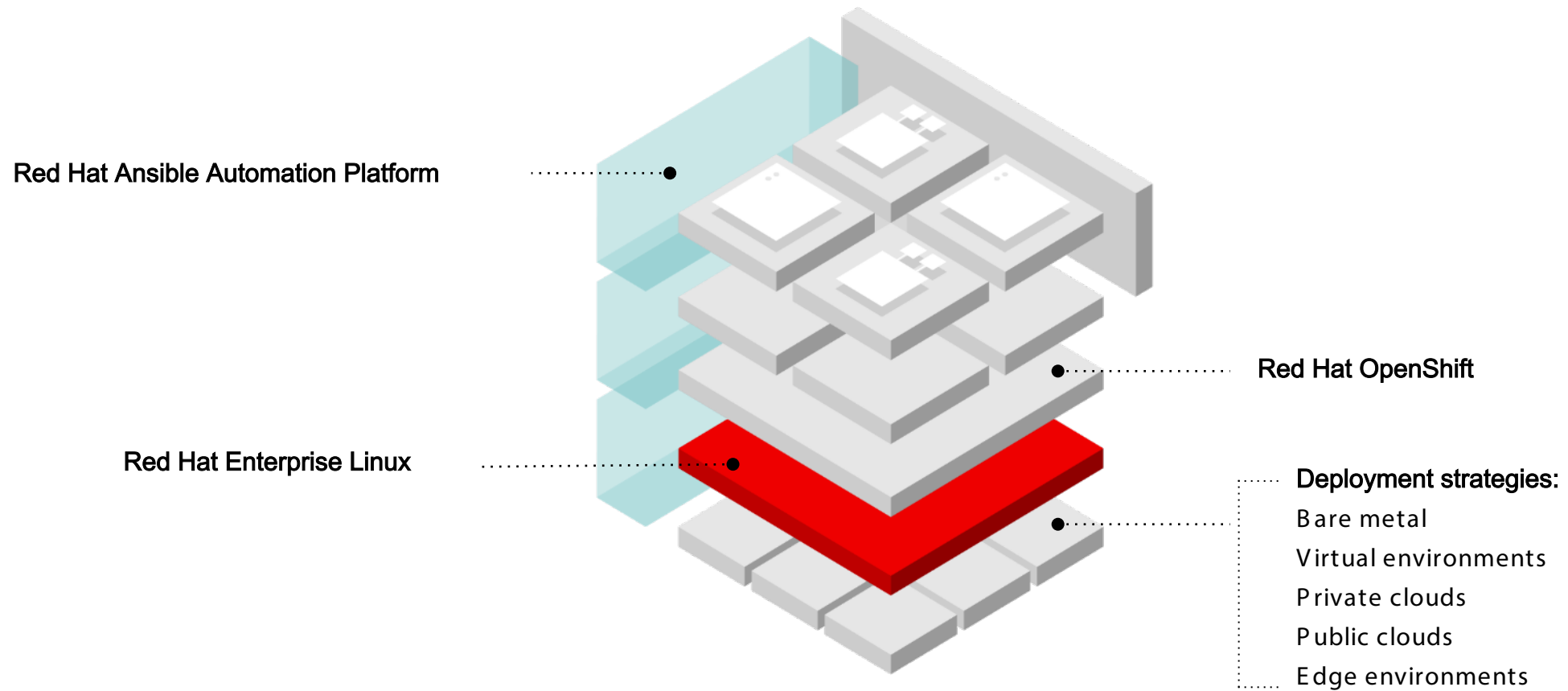
Transportation



Retail

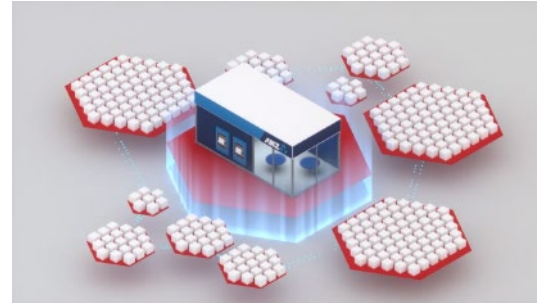


# Our broad portfolio tackles customer challenges



# Customer Reference Team Mission

We are a customer-centric team that **connects** customers, advocates and Red Hatters, **creates** engaging and targeted customer success assets and **promotes** those success stories internally and externally.



# Customer Reference Team org

The customer reference team includes three focused groups - Global Sales Engagement, Global Programs, and Operations:

## Global Sales Engagement

The Global Sales Engagement team is the sales facing arm of the reference program focused on supporting sales in the deal cycle and recruiting new references.

- Global sales engagement standards
- Strategic approach to references and relationships
- Trusted advisor for sales

## Global Programs

The Global Programs team drives the creative strategy and activation for all customer and partner reference assets and activities globally.

- Customer storytelling
- Merchandising creative assets (internal connections with RDC/GCT)
- Partner reference strategy

Program brands:



## Operations

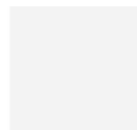
The Operations team supports the reference program with planning and prioritization and serves as the first point of contact for Comms (AR/PR/social) internal stakeholders.

- Project prioritization
- Tools and content library maintenance
- Internal comms (newsletters, slides) and external comms (social media)

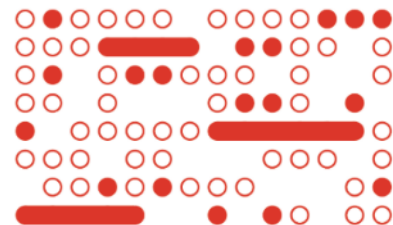
# Innovators in the Open Brand Identity



Red Hat red    Black    White



Gray 1



Patterns

Red Hat  
Innovators  
in the Open



Red Hat  
Innovation  
Awards 2020



# Innovators in the Open Creative

**SUCCESS STORY**  
HCA Healthcare uses innovative data platform to save lives

The screenshot shows a video player with a play button in the center. The video depicts healthcare professionals in a clinical setting. The Red Hat logo and navigation menu are visible at the top.

**Red Hat Innovators in the Open**  
Our customers create meaningful change with open source technologies  
We're proud to call them innovators in the open.

Logos for Ford, Deutsche Bank, Telefonica, Siemens, UPS, and Alliance Bank are displayed. Below them, it says "A trusted partner across industries-and the globe".

**RED HAT INNOVATION AWARDS**  
We don't like to brag—unless it's about our customers

Our customers make inspiring improvements that affect their lines of business, organizations, and even the global community. Red Hat honors select customers each year through the Red Hat® Innovation Awards program.

**VOTING IS OPEN**  
2 : 18 : 12 : 24  
DAYS HRS MIN SEC

**SUCCESS STORY**  
Ally Financial adopts cloud platform and DevOps, speeds time to market

**Overview**  
Ally Financial, a leader in digital financial services, delivers online banking, auto finance and insurance, home loans, investing, and corporate finance. The company wanted more reliable and predictable deployments to keep up with an ever-changing market. Ally partnered with Red Hat to create a containerized hybrid cloud platform to support cloud-native application development, and it adopted DevOps processes to increase collaboration, innovation, and efficiency.

**2019 Red Hat Innovation Awards honorable mention**

**Red Hat Innovators in the Open**  
**Share your story of open source innovation**

Our customers create meaningful change with open source technologies. We're proud to call them Innovators in the Open.

Innovation is the core of open source technology and approaches. Red Hat customers use open source technologies to change not only their own organizations but also entire industries and markets—locally, regionally, and globally.

The Red Hat® Innovators in the Open program proudly showcases how our customers use enterprise open source solutions to solve their toughest business challenges.

**“Red Hat is a workforce multiplier when it comes to attracting top talent.”**  
Rafael Sankari  
CIO, Delta Air Lines

**“This customer reference project has had a significantly positive impact on us as a company.”**  
Tracy Valkman  
Corporate Communications, P. Apollo

**“This [customer reference] team is extraordinary. I have not worked with better.”**  
Dr. Edmund Jackson  
Chief Data Officer & Chief Data Scientist,  
HCA Healthcare

**Learn more: Watch the 2019 Red Hat Summit keynote**

facebook.com/redhatinc @RedHat  
linkedin.com/company/red-hat

redhat.com **Brief** Share your story of open source innovation

**Create new opportunities by becoming a Red Hat Innovator in the Open**

- Gain publicity for your company and build brand awareness.
- Receive recognition for your IT innovation and business success.
- Recruit skilled IT talent interested in modern, open source technology.
- Network with Red Hat executives and industry leaders.
- Participate in professional development opportunities.
- Optimize your IT environment and operations through a stronger partnership with Red Hat.

**Showcase your story with our Customer Reference team**

From case studies to social media, the Red Hat Customer Reference team works to craft engaging customer stories in a variety of formats suited to your goals.

**Public references**

- Case studies: 2-4 page detailed content about your business challenge, the technology solution, and the benefits achieved
- Web success stories: Shorter, digital versions of our case studies
- Videos
- Press releases and media and analyst interviews
- In-person and virtual event speaking opportunities, including Innovators on the Line webinar
- Blog posts
- Marketing and advertising, such as magazine wraps, banners, and signs

**Private references**

- Analyst product evaluations and commissioned papers
- One-on-one educational briefings
- Internal win reports
- Peer-to-peer calls



We help others  
“follow in the  
footsteps” of our top  
advocates

#### Lessons learned

1. Create opportunities to take risks
2. Use data to inform storytelling
3. Be intentional about how you use data to tell your program story

# PART 1: Take Risks!

# Customer Reference content strategy

From quantity  
to quality

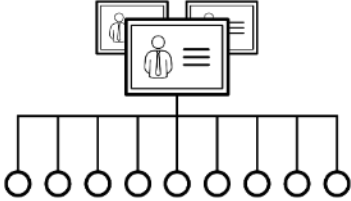


From scrambling to fulfill many reference needs with many 2-4 page case studies

One story:  
many applications



From serving all stakeholders and audiences with one asset.



To proactively infusing a few key customers across many aspects of marketing and communications making customer references truly pervasive at Red Hat

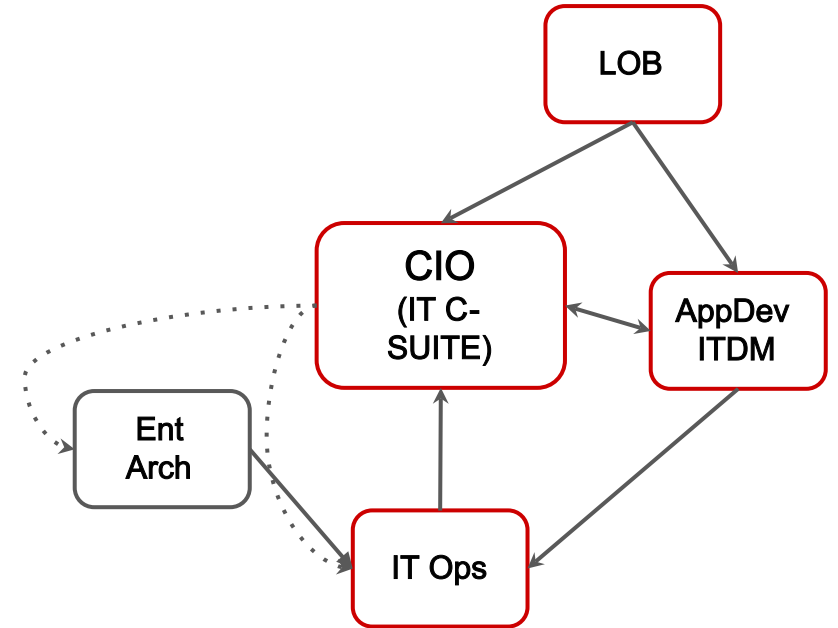
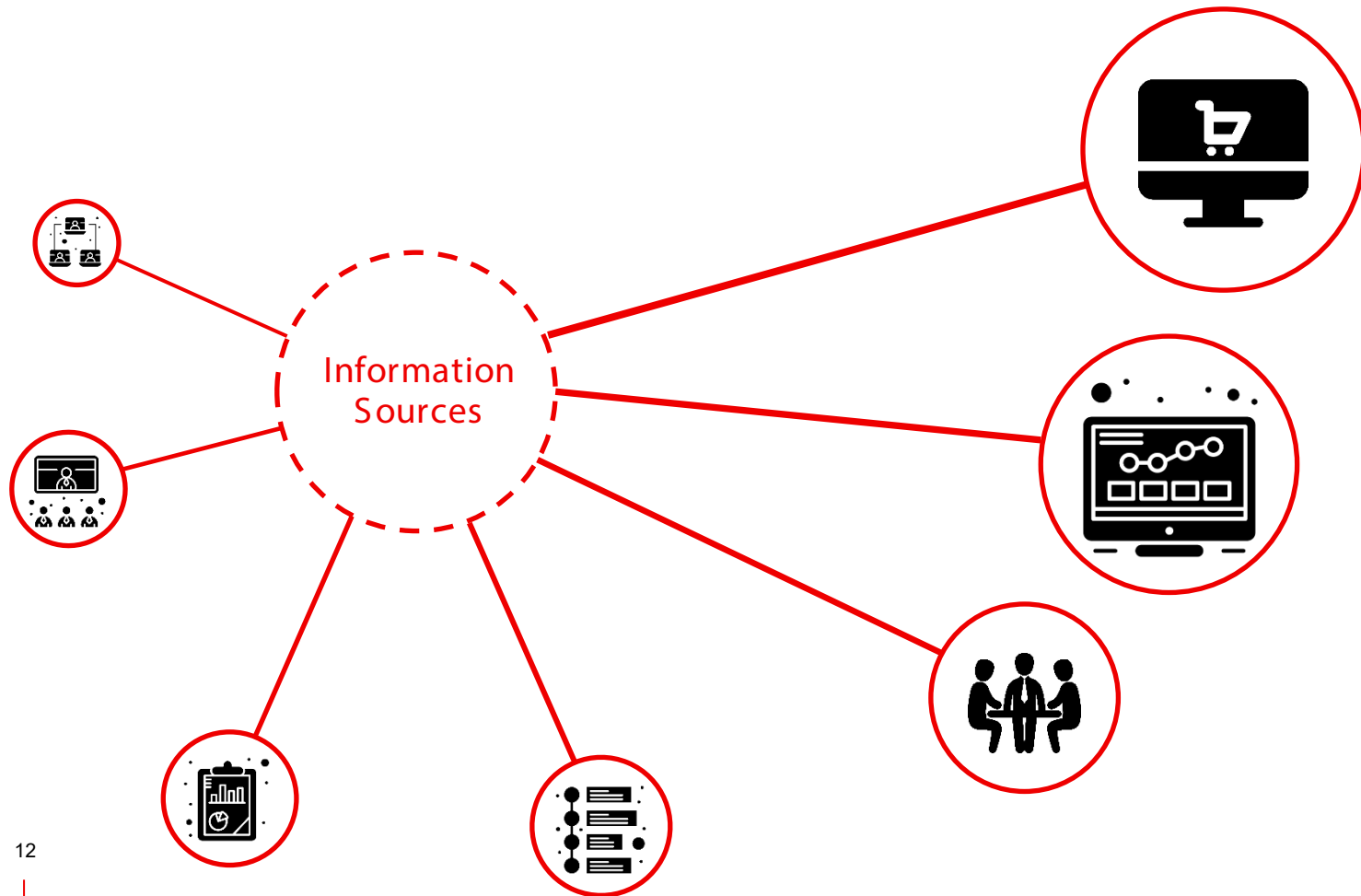


To building a package of content around one story to serve specific needs and audiences



C-suite (IT)

# INFORMATION SOURCES AND WATERING HOLES DEEP DIVE





# Where do we start?



# Red Hat Innovation Awards

**Emirates NBD builds cloud platform for digital transformation with Red Hat**

**FAST FACTS**  
 Industry: Healthcare  
 Region: NA  
 Headquarters: Nashville, TN  
 Company size: 273,000+ employees in 1,800 care sites

**Overview**  
 HCA Healthcare, one of the largest healthcare service providers in the United States, uses data and technology to support modern healthcare. A cross-functional team of clinicians, data scientists, and technology professionals at HCA Healthcare used Red Hat® solutions to create a real-time predictive analytics product system to more accurately and rapidly detect sepsis, a potentially life-threatening condition.

**2019 Red Hat Innovation Awards winner**

**HCA Healthcare uses technology to save lives**

Using Red Hat open source software, HCA Healthcare built a cloud platform to analyze data to predict sepsis earlier—helping to save lives.

Products Solutions Services & support Resources

Red Hat & open source

SUCCESS STORY

HCA Healthcare uses innovative data platform to save lives

SEE ALL SUCCESS STORIES

**FAST FACTS**  
 Industry: Healthcare  
 Region: NA  
 Headquarters: Nashville, TN  
 Company size: 273,000+ employees in 1,800 care sites

*"The products we run affect people's lives deeply, and we need partners who are there to work with us 24x7. Our relationship with Red Hat is critical to ensuring service quality in the clinical environment."*

DR. EDMUND JACKSON, CHIEF DATA SCIENTIST, HCA HEALTHCARE

**OVERVIEW**

HCA Healthcare, one of the largest healthcare service providers in the United States, uses data and technology to support modern healthcare. A cross-functional team of clinicians, data scientists, and technology professionals at HCA Healthcare used Red Hat® solutions to create a real-time predictive analytics product system to more accurately and rapidly detect sepsis, a potentially life-threatening condition.

**2019 Red Hat Innovation Awards winner**

**HCA Healthcare uses technology to save lives**

Using Red Hat open source software, HCA Healthcare built a cloud platform to analyze data to predict sepsis earlier—helping to save lives.

EDUCATION PAYROLL  
Rārangī Utu ā-Mātauranga



Medifé



Ministerio de Salud  
Presidencia  
de la Nación

Deloitte.



An Roinn Talmhaíochta,  
Bia agus Mara  
Department of Agriculture,  
Food and the Marine

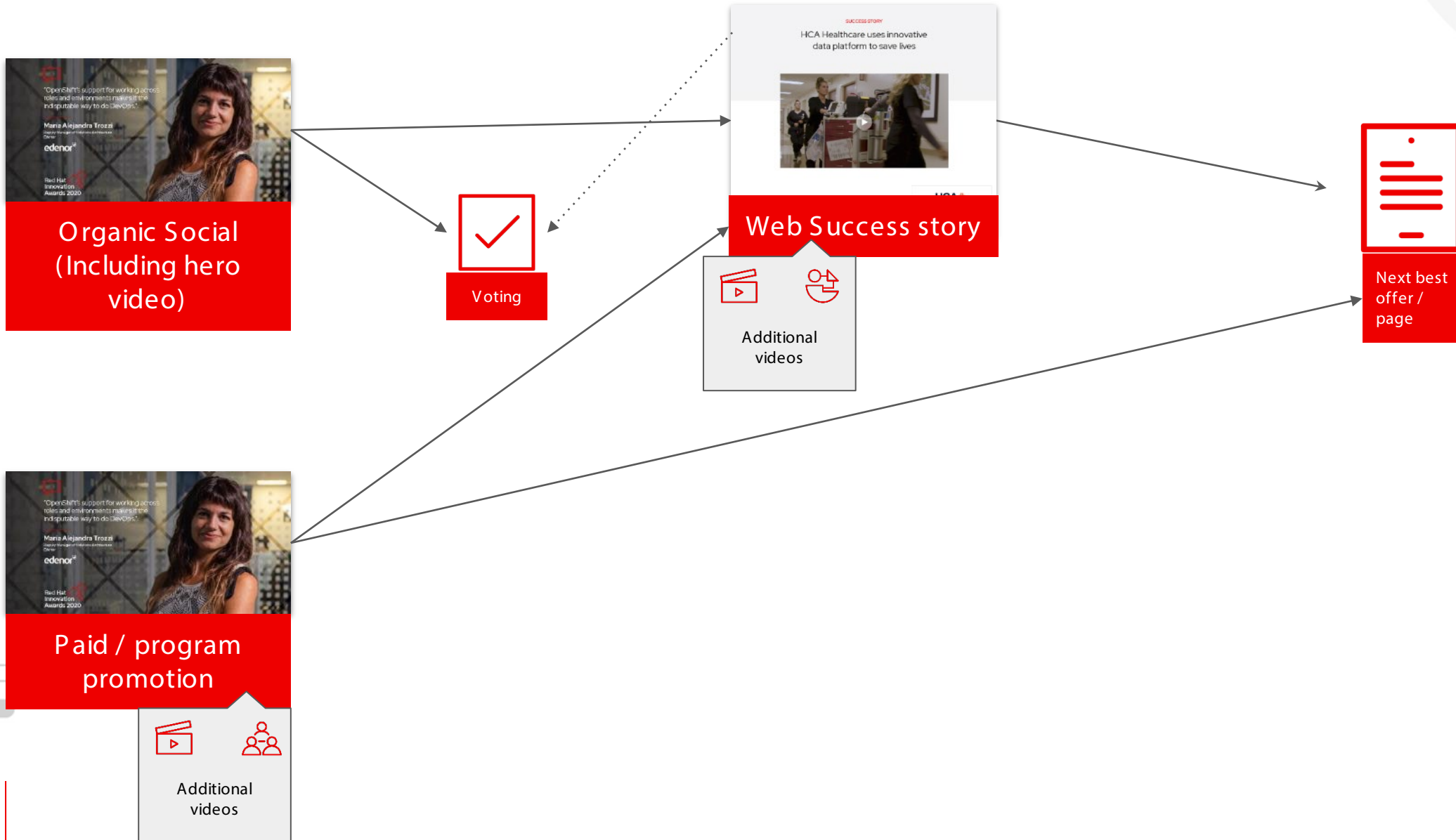


Red Hat  
Innovation  
Awards 2021



VERSION 1

# General Visitor Flow





# INNOVATION AWARDS DATA / MEASUREMENT STRATEGY

GOAL	Create awareness for Innovation Awards winners' stories, while driving content in Red Hat's OpenShift digital ecosystem (both customer and non-customer specific).			
STRATEGY	Drive awareness of the innovation awards program, on-page engagement, and click through to relevant pages.			
QUESTIONS TO BE ANSWERED	<p style="text-align: center;"><b>AWARENESS</b></p> <p>Does Innovation Awards get in front of enough users to drive awareness of Red Hat technology?</p>	<p style="text-align: center;"><b>ENGAGEMENT</b></p> <p>Do users get enough from Innovation Awards content to learn more?</p>	<p style="text-align: center;"><b>PARTICIPATION</b></p> <p>Do users participate in Innovation Awards by voting, learning about multiple customers, etc?</p>	<p style="text-align: center;"><b>CONVERSION</b></p> <p>Do users continue from Innovation Awards stories to other focus areas, including Product, Customer, and Summit?</p>
KEY METRICS	<ul style="list-style-type: none"> <li>▶ <b>100K Increase</b> in impressions on Red Hat branded social channels</li> </ul>	<ul style="list-style-type: none"> <li>▶ Video views increased by <b>53%</b> on social</li> <li>▶ Social media engagement increased by <b>48%</b></li> </ul>	<ul style="list-style-type: none"> <li>▶ <b>43%</b> Multi Page Visit Rate</li> </ul>	<ul style="list-style-type: none"> <li>▶ <b>12%</b> eventually viewed a Summit page after viewing an IA page</li> <li>▶ <b>13%</b> eventually viewed a product page after viewing an IA page</li> </ul>

# PART 2: Data to story

# How we think about references

References don't stop at their original format.



## Cepsa automates IT to improve its operational efficiency with Red Hat

**Software and services**  
Red Hat® Ansible® Automation Platform  
Red Hat Consulting

**Existing products**  
Red Hat OpenShift®  
Red Hat Enterprise Linux®

Global energy and chemical company Cepsa needed to increase efficiency and stay compliant while reducing costs, risk, and downtime. To achieve this goal, it began automating processes to save work hours, improve service response times, enhance IT security, and transform organizational culture. Working in close collaboration with Red Hat Consulting, the company established automation as a core pillar of its innovation strategy, led by an automation manager. As a result, Cepsa increased productivity by 35% and increased response times by 10-15%.

**Sustainability mobility and energy**  
More than **10,000** employees

**Benefits**

- ▶ Saved more than 6,000 work hours with central automation approach
- ▶ Enhanced service levels with 10-15% faster IT response times
- ▶ Improved IT security with enhanced access controls
- ▶ Transformed business culture with expert automation guidance

**Headquarters**

"Red Hat has helped us make automation the center of our digital transformation efforts."

**Francisco José Martín Pérez**  
Automation Manager, Department of Exploitation and Operation, Cepsa

facebook.com/redhatinc  
@redhat  
linkedin.com/company/red-hat

redhat.com



## CEPSA

### Cepsa boosts efficiency with Red Hat Ansible Automation Platform

Global energy and chemical company Cepsa wanted to increase efficiency and stay compliant while reducing costs, risk, and downtime. To achieve this goal, the company turned to automation to find efficiencies in work hours, improve service response times, enhance IT security, and transform organizational culture.

### Ready to upgrade to Red Hat Ansible Automation Platform

Taking the first steps on an automation journey to increase operational efficiency and establish consistent IT security, Cepsa began a digital transformation initiative in 2018. The company adopted the community version of Ansible. The automation tool demonstrated efficiency that Cepsa wanted to expand organization-wide.

"In the beginning, we were using the Ansible community version to automate small services," said Francisco José Martín, Automation Manager, Department of Exploitation and Operation, Cepsa. "Then we had a complex SAP migration, from our on-premise SAP platform to SAP S/4HANA® in the AWS cloud. We saw automation could help, but we needed an automation platform to achieve our goals."

After the success of its early automation projects and its long-standing relationship with Red Hat, Cepsa decided to extend Ansible across the business with Red Hat Ansible Automation Platform. Using Ansible Automation Platform, Cepsa gained a supported foundation for building and operating automation services at scale and a composable, collaborative, and trusted execution environment.

Cepsa adopted Ansible Automation Platform for its SAP migration. Ansible Automation Platform offers a visual dashboard and access control for automation functions and tools. These tools include analysis systems and reusable and certified content, so users can centralize and control their infrastructure.

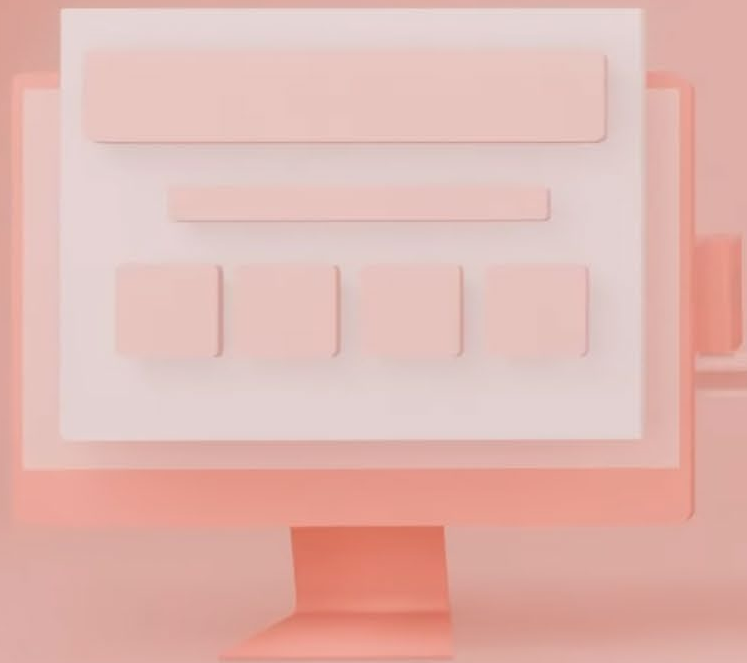
Cepsa turned to Red Hat Consulting for guidance on how to maximize value from its automation platform. Through the Red Hat Navigate engagement, Cepsa and Red Hat Consulting worked together to identify knowledge gaps and the cultural changes required for successful implementation of automation initiatives. Red Hat is helping Cepsa establish an organizational model for automation by delivering online workshops designed to help teams understand automation and its possibilities. Working with Red Hat's experts, Cepsa completed its SAP migration in just a few months, and within a year, they have automated more than 400 IT operations processes.



A man in a brown jacket and a woman in a blue patterned blouse are standing in a modern office, looking at a large digital display. The man is pointing at the screen, and the woman is holding a white box. The display shows various metrics, including a timer at 00:00:19, a number 986, and a section titled 'Live User Sessions'. The office has desks, chairs, and a whiteboard in the background.

This is what connecting  
your clouds feels like



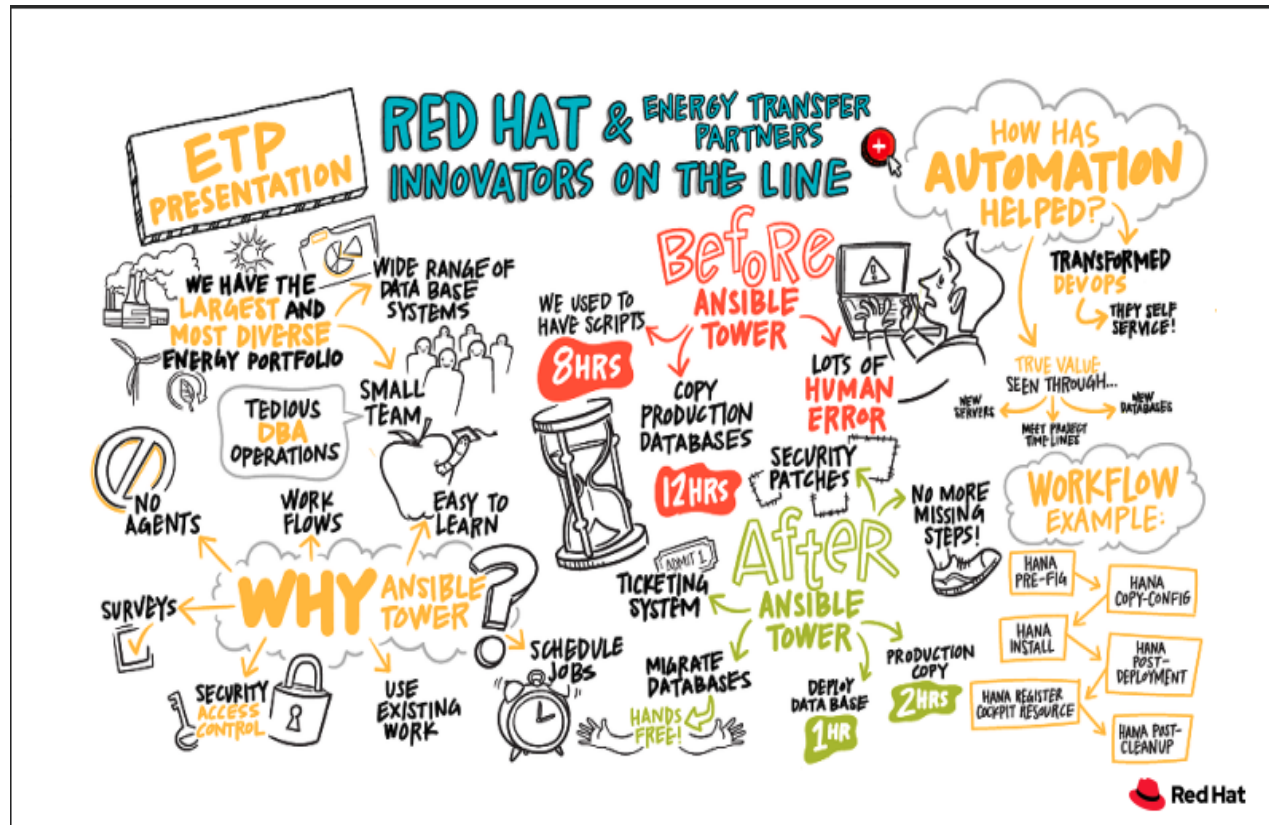


## Content Performance Improvement

**426%**

Increase In Marketing Source Opp Value

# Innovators in the Open: Roundables



- ▶ Format:
  - 15 min introductory presentation
  - 45 min. roundtable discussion
- ▶ Takeaway: scribe session artwork

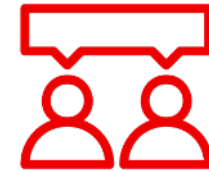
# Connecting Roundtables to In-Person Events



More than 200 customer attendees worldwide



Accounts for nearly 10% of our program's opportunity value



Localized special Interest Groups





Hard.  
To.  
Scale.

# Recreating the peer-to-peer experience digitally

By meeting our customers where they are

Asking ourselves:


- ▶ What are we hearing most during roundtable sessions?
- ▶ What interesting customers have we not been able to close with normal content?
- ▶ Where do we have gaps in our marketing plans?



# Recreating the peer-to-peer experience digitally

By piloting new content types

**Jeff Shaw**  
Executive Vice President,  
Chief Information Officer  
Employers Insurance Group




to its  
competitors,

**Benefits of  
Automation**



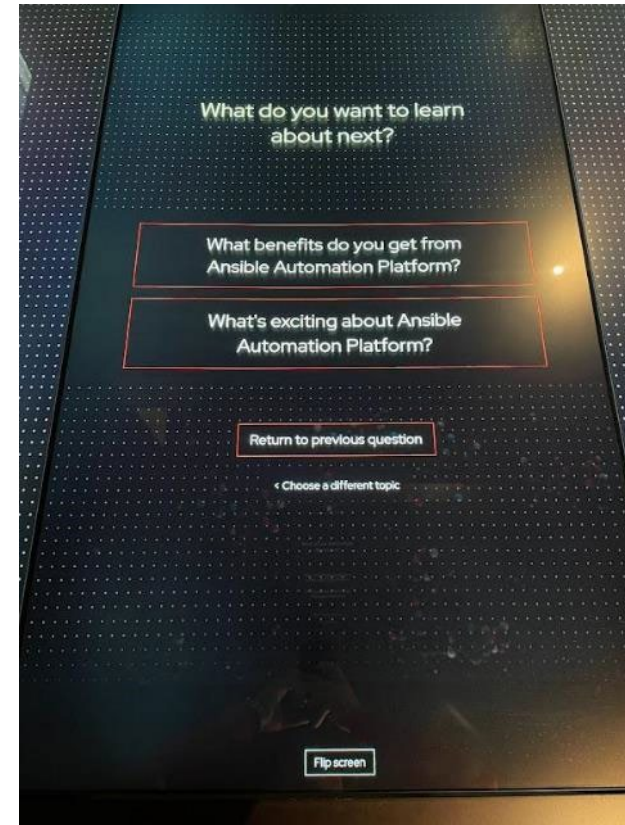
**Erick Lemus**  
Director, Systems & Maintenance Engineering  
Verizon



Through the  
automation  
that OpenShift

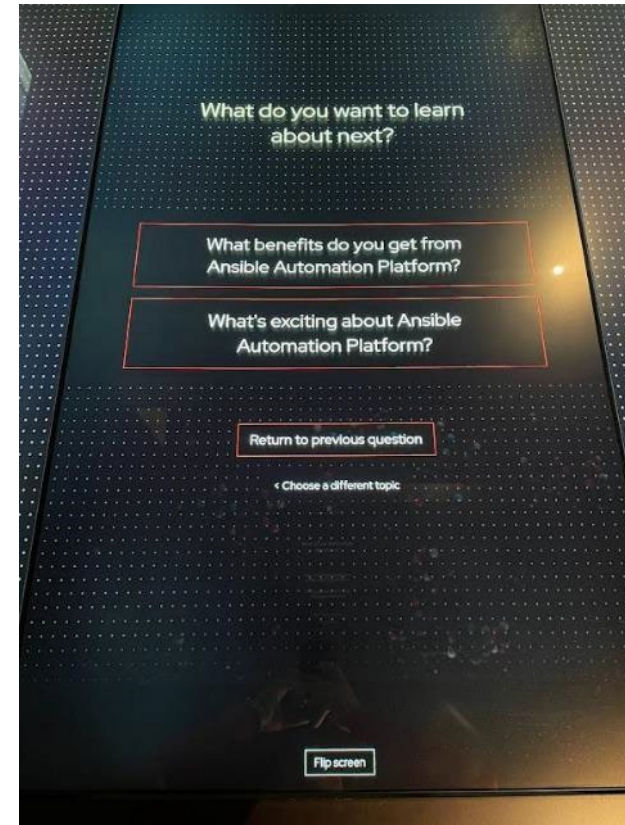
# Recreating the peer-to-peer experience digitally

By letting users ask their own questions



# Recreating the peer-to-peer experience digitally

By letting users ask their own questions





# PART 3: Effective Data Storytelling

## Generally, we're measured across 4 areas

AWARENESS	ENGAGEMENT	PARTICIPATION	CONVERSION
Do references get in front of enough users to drive awareness of Red Hat technology?	Do users get enough from reference content to learn more?	Do customers participate in the Innovators in the Open program?	Do users continue from customer stories to other focus areas, including Product, Customer, and Summit?

But opportunity value and reference participation are the focus

# What does it all mean?

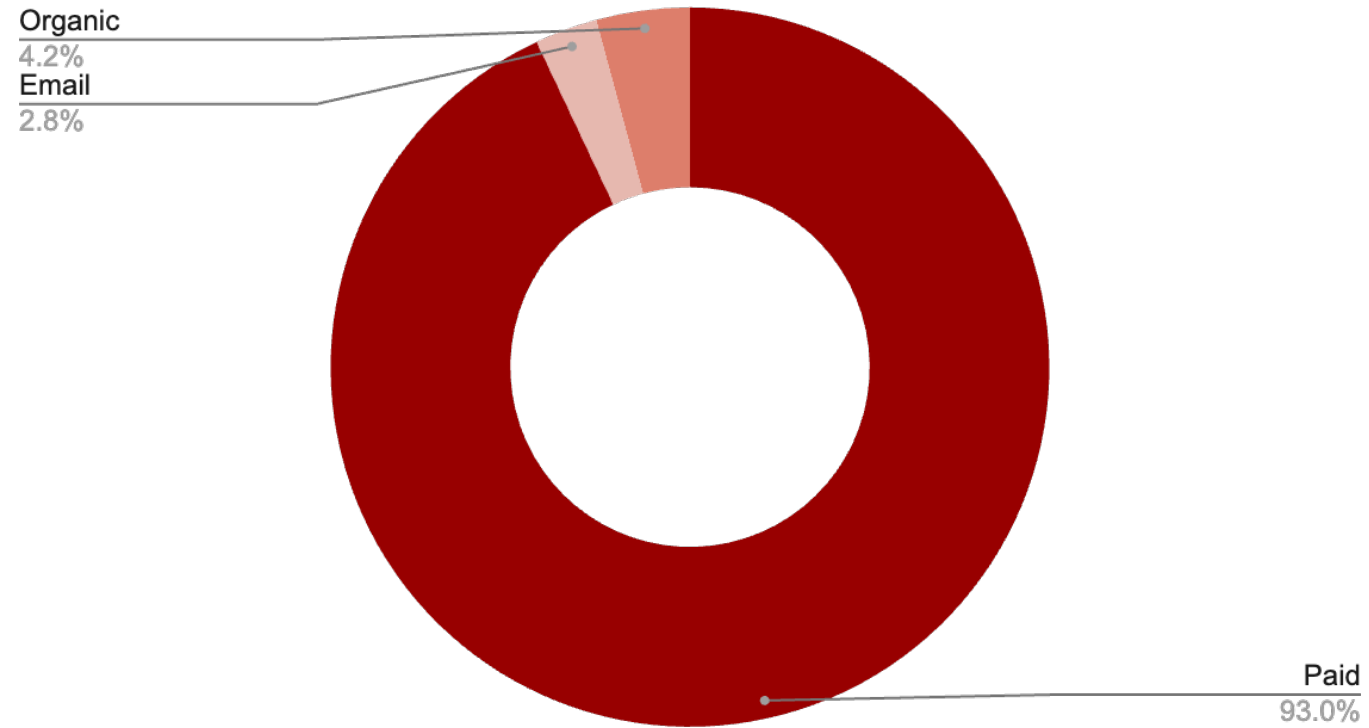
## Opportunity Value

- ▶ **What people think it shows:** Value given back to the business by customer reference efforts
- ▶ **What it actually shows:** the customer reference team's ability to “sell” references to marketers who own promotional budgets



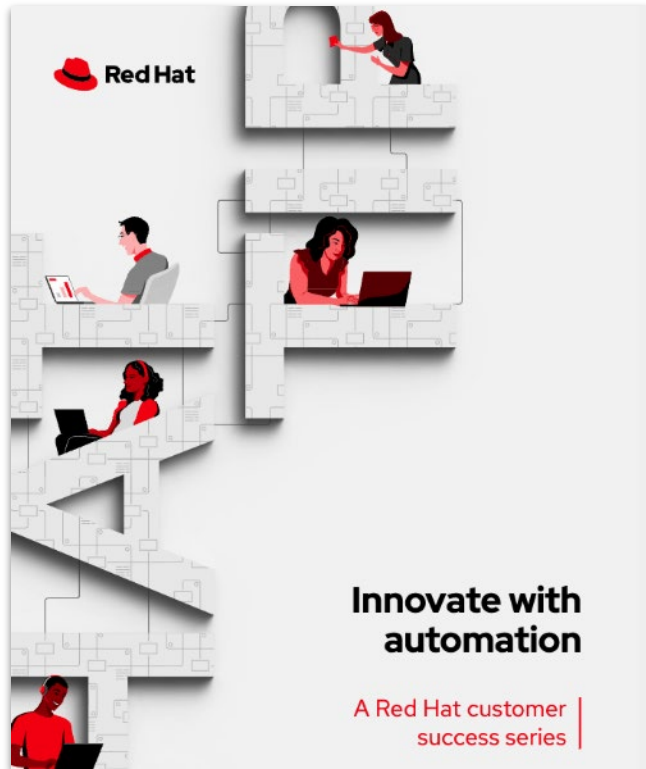
# Value is driven by promotion

Opportunity Value by Tactic



# Use data to ask for help

## Promoting existing references



**Red Hat**

**Innovate with automation**

A Red Hat customer success series



**CEPSA**

**Cepsa boosts efficiency with Red Hat Ansible Automation Platform**

Global energy and chemical company Cepsa wanted to increase efficiency and stay compliant while reducing costs, risk, and downtime. To achieve this goal, the company turned to automation to find efficiencies in work hours, improve service response times, enhance IT security, and transform organizational culture.

**Ready to upgrade to Red Hat Ansible Automation Platform**

Taking the first steps on an automation journey to increase operational efficiency and establish consistent IT security, Cepsa began a digital transformation initiative in 2018. The company adopted the community version of Ansible. The automation tool demonstrated efficiency that Cepsa wanted to expand organization-wide.

"In the beginning, we were using the Ansible community version to automate small services," said Francisco José Martín, Automation Manager, Department of Exploitation and Operation, Cepsa. "Then we had a complex SAP migration, from our on-premise SAP platform to SAP S/4HANA® in the AWS cloud. We saw automation could help, but we needed an automation platform to achieve our goals."

After the success of its early automation projects and its long-standing relationship with Red Hat, Cepsa decided to extend Ansible across the business with Red Hat Ansible Automation Platform. Using Ansible Automation Platform, Cepsa gained a supported foundation for building and operating automation services at scale and a composable, collaborative, and trusted execution environment.

Cepsa adopted Ansible Automation Platform for its SAP migration. Ansible Automation Platform offers a visual dashboard and access control for automation functions and tools. These tools include analysis systems and reusable and certified content, so users can centralize and control their infrastructure.

Cepsa turned to Red Hat Consulting for guidance on how to maximize value from its automation platform. Through the Red Hat Navigate engagement, Cepsa and Red Hat Consulting worked together to identify knowledge gaps and the cultural changes required for successful implementation of automation initiatives. Red Hat is helping Cepsa establish an organizational model for automation by delivering online workshops designed to help teams understand automation and its possibilities. Working with Red Hat's experts, Cepsa completed its SAP migration in just a few months, and within a year, they have automated more than 400 IT operations processes.

# What does it all mean?

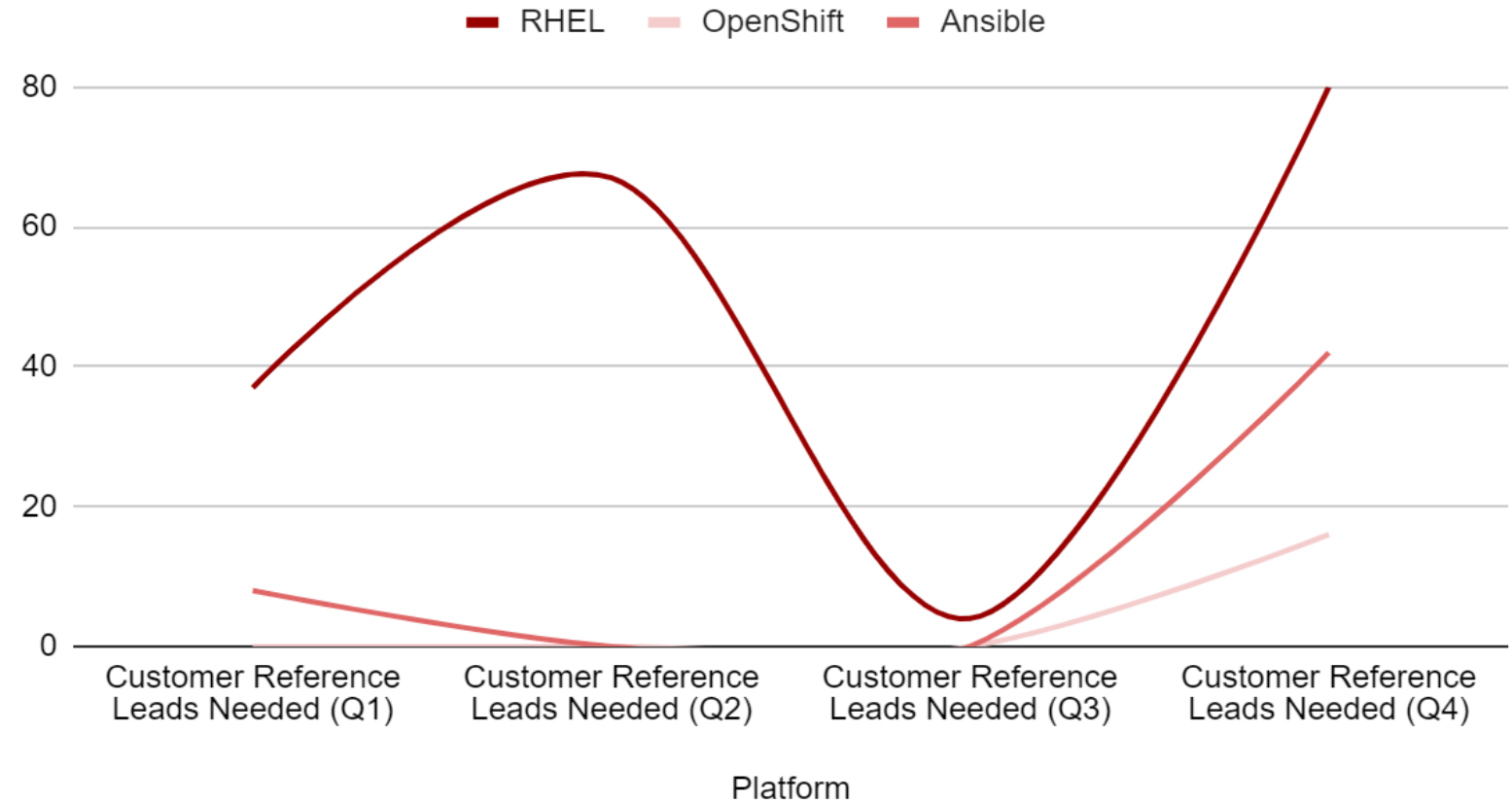
## Reference Participation

- ▶ **What people think it shows:** How satisfied our customers are with our products
- ▶ **What it actually shows:** the customer reference team's ability to close reference opportunities, and how well we've navigated the customer's PR team

# Use data to ask for help

## Customer Reference Pipeline Coverage

CY23 Customer Reference Leads needed



Leads

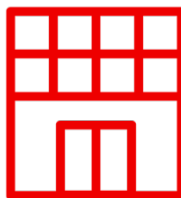
Targets - (in progress + published)

# How do we report?

By setting our own targets for customer content



Historical data



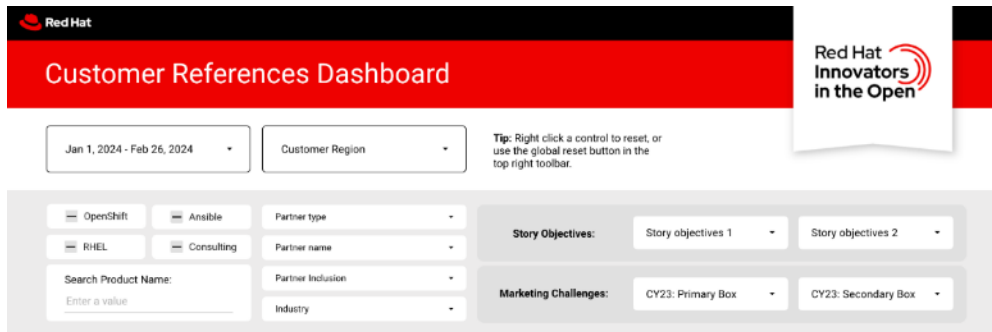
Agency commitments



Regional needs

# Distribution Challenges

800+ Unique pieces of content published since 2020



Google Looker Studio



Rolling customer references deck

## Success of data and distribution strategy

- ▶ More engaged conversations with our stakeholders about recruitment and promotion
- ▶ “Seat at the table” in more high level marketing conversations




## Q & A

Red Hat is the world's leading provider of enterprise open source software solutions. Award-winning support, training, and consulting services make Red Hat a trusted adviser to the Fortune 500.

 [linkedin.com/company/red-hat](https://www.linkedin.com/company/red-hat)

 [facebook.com/redhatinc](https://www.facebook.com/redhatinc)

 [youtube.com/user/RedHatVideos](https://www.youtube.com/user/RedHatVideos)

 [twitter.com/RedHat](https://twitter.com/RedHat)

