

# Transition of Power: Communicating to Maintain Brand Strength & Consumer Confidence During an Acquisition

**Company:** SurfControl  
**Agency:** Citigate Cunningham  
**Timeframe:** 2007

Periods of transition around mergers and acquisitions present innumerable challenges for organizations, especially when a primary goal is to retain a brand's relevance and prominence in the marketplace.

Such was the dilemma faced by **SurfControl**, a leading provider of global on-demand, network and endpoint IT security solutions, in early 2007, at which point speculation was running amok in the Silicon Valley pipeline that **Websense**, a security software company headquartered in San Diego, would be purchasing the company. Sure enough, on April 26, 2007, rumors crystallized into reality when Websense announced a formal offer to acquire its rival. The acquisition would span six months

and was officially closed on October 3, 2007.

To foster a strong corporate image and maintain its network of business relationships with customers and partners during the transition, SurfControl partnered with **Citigate Cunningham**, an agency that specializes in working with Silicon Valley clients, during this period of uncertainty. It helped that SurfControl already had a working relationship with Citigate Cunningham.

"We worked with them a year before the acquisition by Websense," says Melissa Sheridan, executive vice president, Citigate Cunningham. "They came to us and said, 'We want to make sure our customers don't leave us. We need to reassure them that we have leadership and are relevant—sort of we're continuing business as usual.'"

Citigate Cunningham executives recommended that

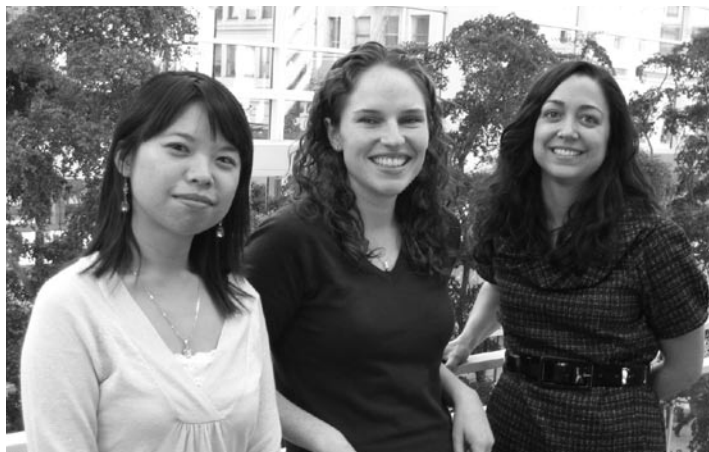


Photo courtesy of Citigate Cunningham

The Citigate Cunningham for SurfControl Team. Pictured (left to right) Candice Huang, Rosemary Wilson and Melissa Sheridan.

## COMMUNICATING DURING AN ACQUISITION: INCREASE YOUR PROFILE

To maintain longstanding, fruitful relationships with consumers, advertisers and stakeholders during an acquisition, **Citigate Cunningham's** executive vice president Melissa Sheridan offers these best practices on how to keep your brand relevant:

- **Continue speaking to the media:** It's crucial to act as if business is operating as usual. "Have execs hold briefings with editors-in-chief and editorial influencers so that they can be seen as still on scene—still relevant and contributing value to the industry."
- **Map out a significant news calendar:** Make sure you have a "steady drumbeat of news" to announce to the media. When Sheridan worked on the campaign with **SurfControl**, she and her colleagues were always reviewing what SurfControl had in the news pipeline in terms of customer wins and partnership announcements.
- **Package the brand for industry honors:** This is key to generating further attention for the brand. "We submitted a lot of industry awards," says Sheridan. "SurfControl's products were always well-regarded. We wanted to make sure that they would remain the same within the same timeframe."

the SurfControl team resume aggressive actions with media and analysts to drive the company's overall objectives during the six months leading up to the closing date. These objectives included:

- Inspiring confidence in the installed base of customers to stimulate renewals;
- Raising SurfControl's profile in the channel communicating that SurfControl was still in the game and was expanding its programs; and,
- Elevating SurfControl's leadership as a company.

After Websense announced its intent to acquire SurfControl, Citigate Cunningham strategically targeted the top influencers that mattered most to the company's customers, partners and the industry at large, including business, technology trade, security-specific and channel press, industry analysts and new media.

### GET WITH THE PROGRAM

To support SurfControl's objectives, Citigate Cunningham developed three

major programs:

1. Own the channel press to demonstrate ongoing leadership and commitment to partners;
2. Create a customer success spotlight to stimulate sales and retention;
3. Flesh out the overall leadership platform to boost company morale and industry confidence.

For the channel press program, the tactics Citigate Cunningham developed that would map back to the overall objectives included:

- Placing partner case studies in target channel publications;
- Submitting SurfControl's channel executives for channel-specific awards to raise the company's profile in the channel; and,
- Establishing relationships and strengthening existing bonds with top-tier channel press as well as targeted analysts resulting in high-quality channel coverage.

For the customer suc-

cess spotlight, Citigate Cunningham focused on placing customer case study placements in top trade and security outlets, and securing speaking opportunities at a major industry event. Finally, for the leadership platform component, Citigate Cunningham set out to the following:

- Secure one-on-one briefings with top-tier business publications;
- Secure in-person and phone briefings with editorial and analyst influencers leading up to the SurfControl Email Filter 6.0 product announcement;
- Target product reviewers around key products and announcement;
- Forge relationships with key bloggers and garner coverage through new media channels such as podcasts;
- Submit SurfControl and executives for prestigious industry awards; and,
- Place a bylined column for the CEO in security-specific outlets.

### PAUSING TO REGAIN COMPOSURE

But not all went smoothly. Initially, SurfControl did not want to speak to the press, says Rosemary Wilson, senior account manager at Citigate Cunningham. This “dark period” began in February 2007, when speculation that Websense may acquire SurfControl was burning up the

Silicon Valley grapevine. When Websense did announce its intent to acquire SurfControl in April 2007, the silence ended.

“They were ready to resurface visibility again and start talking to the press,” Wilson says. “They wanted to create and direct clear messaging that they were there for customers and SurfControl had maintained their strong control.”

However, the acquisition, coupled with the “dark period,” made SurfControl feel apprehensive and anxious about openly engaging with the media in the wake of the Websense news developments. To allay their nerves, the Citigate Cunningham team cancelled a few early meetings to carefully coach SurfControl execs in the art of media relations—a decision that doesn’t always come easily when reporters come calling. But it served the team well; when this phase was finished, the team switched gears and “ramped up” communications efforts immediately “without having a lot of momentum behind it.”

Yet as with the case of most corporate takeovers, the team had to deal with organizational shifts at the top of the SurfControl leadership, which included a few VIPs—though the CEO remained.

The leadership vacuum “did create a challenge,” notes Sheridan. “We went in and had to start with ground zero and build relationships with [the new execs] and say, ‘This

## THE IMPORTANCE OF BEING EARNEST

For the Citigate Cunningham team that worked on keeping the SurfControl brand relevant and alive during its acquisition by Websense, there were several key lessons learned, much of which had to do with being media-friendly while knowing how to artfully deflect certain issues. Following are four major points:

- Being a go-to resource for the press on issues (the impact of social networking on enterprise IT security, sudden shifts in malware, etc.) is always a good way to generate buzz.
- A survey on a timely, compelling issue can be a great way to garner high-profile coverage while turning attention away from unwanted speculation or a controversial issue (For example, SurfControl commissioned a survey on Trust & Risk in the Workplace and leveraged the data to secure top tier, positive coverage in publications like Investor’s Business Daily)
- A key strategy is having from day one solid media and analyst relationships in place, so that influencers have the context on the company’s strategy. This helps when you hit a bumpy patch.
- Leveraging third-party advocates such as partners and customers as spokespeople really lends credibility to the company’s relevance.

is what we did in the past and this is how we can accomplish that.” Fortunately, the new execs had confidence in the agency.

“We were able to get results that mapped back to the communications strategy that we recommended,” Wilson says.

### SUCCESSFUL SUCCESSION

Citigate Cunningham’s efforts to keep the SurfControl brand relevant during the period of acquisition were a resounding success.

“The agency never failed to accommodate a request,” says Michelle Fleschute, former PR manager at SurfControl. “They

provided and successfully executed on strategic campaigns and programs that elevated SurfControl during our acquisition. Citigate Cunningham’s deep industry expertise, creative ideas and flawless execution turned the acquisition period into a time of success for the company, which helped made SurfControl a legacy in the industry.” PRN

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