

## ABSTRACT

MORAIN, MATTHEW EDWARD. *Out of the Shadows, Into the Blue: Voice and Tone in the Rhetoric of Technology Marketing*. (Under the direction of Dr. Andrew R. Binder).

This dissertation explores the corporate voice and tone of Red Hat, a large technology company with a unique and passionate company culture, during a period of rapid growth and evolution that threatened its core identity. The company's *ethos* is firmly grounded on the principles of open source software, like collaboration and meritocracy, which heavily influence the way decisions are made about what the company's voice should sound like. Over the course of three studies with varying methodological approaches, this research looks at how Red Hat's different audiences try to determine what is and is not authentic to its corporate voice and tone. It concludes that the Red Hat voice is not a solo but a chorus, developed and refined through a sometimes-challenging process of collaboration. The studies show how that chorus, once harmonious, is in the process of potential change that threatens cacophony as the company grows far beyond its roots as a plucky, disruptive startup. This dissertation offers a bridge between the disciplines of rhetoric and communication to the professional writing environments of technology marketing, with lessons and insights that can benefit each community.

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Out of the Shadows, into the Blue: Voice and Tone in the Rhetoric of Technology Marketing

by  
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## **DEDICATION**

To my parents, Rick and Kathy, who taught me to be curious and kind, who showed me that it's possible to finish your education goals a little bit later than you intended to, and without whom I never would have made it this far. Or...anywhere at all, really.

## BIOGRAPHY

A native Iowan, Matt Morain came to the Communication, Rhetoric, and Digital Media PhD program at North Carolina State University in 2008. He is currently an Associate Creative Director of Copywriting at Red Hat in Raleigh, NC. The *Owl Street Journal* once called his writing, “A real hoot!”

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## TABLE OF CONTENTS

LIST OF TABLES.....	viii
LIST OF FIGURES .....	ix
<b>CHAPTER 1: The voice of Shadowman.....</b>	<b>1</b>
Literature review: audience as common ground.....	3
Classic canons for a digital world .....	6
Community.....	10
<i>Kairos</i> and the rhetorical situation .....	11
Defining voice and tone.....	14
Research questions.....	19
Case study overview: Red Hat and open source.....	20
How Red Hat describes itself.....	23
About open source.....	30
Red Hat’s corporate marketing organization .....	33
Corporate marketing initiatives: a sample of the Red Hat voice.....	35
Ethical considerations .....	38
Conclusion.....	40
<b>CHAPTER 2: The voice is coming from inside the house.....</b>	<b>42</b>
The Shibboleths of Shadowman .....	44
Meritocracy and ‘dumb ideas’ .....	46
Methods of the interviews .....	49
Team roles and backgrounds .....	54
Learning to write in the Red Hat voice .....	57
Available resources and tools.....	57
Mentoring, peer review, and Word Nerds .....	60
Low-stakes, hands-on, and the content editing board .....	62
Evaluating the voice.....	65
The challenges of writing in a voice that isn’t your own .....	65
The 5Cs of the brand voice guidelines .....	69
What would you ask your audience?.....	76
Quality of the writing and uniqueness in the industry.....	79
Working with others.....	84
Do writers get to choose how collaborative their work is?.....	85
Power, trust, and authority .....	86
Conclusion.....	92
<b>CHAPTER 3: What do other Red Hatters think of the corporate voice and tone? .....</b>	<b>94</b>
A \$34-billion surprise .....	94

Is Shadowman losing his voice?.....	98
Research questions .....	100
Initial assumptions about Red Hatters.....	101
Methods for this study.....	102
Demographics .....	103
Survey sections.....	105
Distribution .....	106
Results and discussion.....	109
Are Red Hatters familiar with what corporate marketing does?.....	112
How effective and authentic to Red Hat is the corporate voice? .....	113
How much does the IBM acquisition affect the corporate voice? .....	116
How do Red Hatters rate the 5Cs of the brand voice guidelines?.....	120
Is Red Hat’s voice unique among companies in the tech industry?.....	123
What about jargon? And what about other companies have a clearly defined voice? .....	124
Products and Technologies .....	126
Tenure.....	127
IBM.....	129
5Cs.....	134
Other companies to look up to, and jargon.....	135
Summary of key findings.....	139
Conclusion.....	140
<b>CHAPTER 4: Authenticity and change take the stage at Red Hat Summit 2019 .....</b>	<b>142</b>
Red Hat Summit: An evolving rhetorical situation takes the stage.....	145
The rhetorical situation: what was at stake in 2019 .....	150
Variations on a theme: Summit’s creative development.....	151
What went into creating Red Hat Summit 2019 .....	153
<i>Expand Your Possibilities</i> .....	161
A big blue spanner in the works.....	163
“New hat. Same soul.” .....	168
Executive keynotes: Red Hat, meet Big Blue.....	175
Assessing what attendees think of/at Red Hat Summit.....	182
Participant selection.....	183
Results of my survey and interviews.....	186
Conclusion.....	192
<b>CHAPTER 5: Conclusion and further research.....</b>	<b>194</b>
Reflection .....	196
Limitations of my studies and directions for further research.....	200
<b>REFERENCES .....</b>	<b>205</b>
<b>Appendix A: Writer interview informed consent form.....</b>	<b>212</b>
<b>Appendix B: Recruitment email sent to memo-list for study in Chapter 4 .....</b>	<b>215</b>

**Appendix C: Internal corporate voice survey distributed to Red Hatters via memo-list ..216**

**LIST OF TABLES**

Table 2.1	How members of the Content team rate aspects of the brand voice guidelines .....	70
Table 3.1	Tech companies named as having a clearly defined marketing voice .....	126

## LIST OF FIGURES

Figure 1.1	Community to enterprise open source model .....	30
Figure 1.2	Open source values from the introduction to Red Hat at New Hire Orientation .....	31
Figure 3.1	Daily email volume on memo-list before and after the IBM announcement .....	96
Figure 3.2	Email activity on memo-list in reaction to the IBM acquisition news .....	97
Figure 3.3	Survey participation by tenure at Red Hat .....	110
Figure 3.4	Survey participation by organization .....	111
Figure 3.5	Familiarity with corporate marketing by organization .....	112
Figure 3.6	Survey responses for how well the corporate marketing voice reflects Red Hat ..	113
Figure 3.7	Difference in opinion of the corporate marketing voice by organization .....	114
Figure 3.8	Change over time of opinions of the corporate marketing voice .....	115
Figure 3.9	Perceived change in the corporate voice since the IBM acquisition .....	116
Figure 3.10	Perceived change in the corporate voice since the IBM acquisition by tenure .....	117
Figure 3.11	Anticipated long-term impact of IBM on the corporate voice .....	118
Figure 3.12	Anticipated long-term impact of IBM on the corporate voice by tenure .....	119
Figure 3.13	Respondent opinions of each aspect of the brand voice guidelines .....	120
Figure 3.14	Respondent opinions of each aspect of the brand voice guidelines, tenure .....	121
Figure 3.15	Respondent opinions of each aspect of the brand voice guidelines, organization..	122
Figure 3.16	Respondent opinions of how unique Red Hat’s voice is in the tech industry .....	123
Figure 3.17	Comparison of Red Hat’s use of jargon to other companies .....	123
Figure 3.18	Comparison of Red Hat’s use of jargon to other companies by tenure .....	124
Figure 3.19	Most frequently cited buzzwords .....	125
Figure 4.1	Comparison of old and new Red Hat logo .....	144
Figure 4.2	Broad theme territories for Red Hat Summit 2019, parts 1 and 2 .....	157
Figure 4.3	Broad theme territories for Red Hat Summit 2019, parts 3 and 4 .....	157
Figure 4.4	Internal creative team’s ratings of each possible Summit theme .....	159
Figure 4.5	Final theme options for Red Hat Summit 2019 theme, part 1 .....	160
Figure 4.6	Final theme options for Red Hat Summit 2019 theme, part 2 .....	160
Figure 4.7	Final theme options for Red Hat Summit 2019 theme, part 3 .....	160
Figure 4.8	“Expand Your Possibilities” theme before IBM acquisition news .....	163
Figure 4.9	“Expand Your Possibilities” theme after IBM acquisition news .....	164

Figure 4.10 Key art from the first nine Red Hat Summits .....	165
Figure 4.11 Key art from six of the last seven Red Hat Summits .....	166
Figure 4.12 Key art from Red Hat Summit 2019 .....	167
Figure 4.13 Summit attendees' ratings for the 2019 Summit theme .....	188
Figure 4.14 Summit attendees' opinions of the 5Cs in the brand voice guidelines .....	190
Figure 4.15 Summit attendees' assessments of the way Red Hat communicates wit them.....	191
Figure 4.16 The most frequently cited buzzwords by Summit attendees .....	192

## CHAPTER 1: The voice of Shadowman

On the north side of the ninth floor at 100 East Davie St. in downtown Raleigh, NC, just past the pantry kitchen, live two whiteboard panels, each nine feet tall by four feet wide. At the top is written, in green marker, “Things Shadowman would never\*<sup>1</sup> say,” and each panel is filled with examples of clunky business jargon, like “boil the ocean” and “bleeding edge” and “make the ask” and “synergical connectivity,” each with their suggested replacement that sounds better, like something actual human beings would say in conversation. Shadowman is a brand metonym for Red Hat, an enterprise software company with an open source development model, and these panels exist to remind the folks of Red Hat that their writing should be clear, concise, consistent, compelling, and credible, and should say what they mean, not what they think makes them sound smart.

Take the word “leverage,” for example. It is a perfectly functional word when used as a noun to describe a basic principle of physics. Here’s a fulcrum. Here’s a pivot point. Here’s what gives that leverage, and here’s how that leverage is used. But as simple a function and as simple a word as it appears to most, to the writers at Red Hat, it is a flashpoint of debate, hotly contested, and a shibboleth of sorts for the Marketing Communications Content team, who are one of several teams responsible for maintaining the company’s corporate voice. If you’re reading something from Red Hat that uses “leverage” as a verb, that likely means 1) the Content team did not review it before it was published, or 2) the Content team did review it, but compromised its use as part of a larger back-and-forth with an internal stakeholder. Within the

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<sup>1</sup> The bottom of the left panel clarifies: “By “never” we mean almost never, sparingly, or maybe if a gun was pointed at his head. Of course, Shadowman would also never condone censorship, but he does require that Red Hat communications be smart, clear, unique—never cliché.”

company, there are Red Hatters who think it is perfectly fine to use “leverage” as a verb—e.g., “Leverage this whitepaper to help your organization with its digital transformation”—and those who find its use to be a cardinal brand sin, an unacceptable linguistic transgression that should be banished to the hinterlands of jargon. Each group makes its argument for which words and phrases sound *authentic* to the Red Hat voice and which do not, but with no editor-in-chief to make a supreme ruling, decisions about what the company’s voice and tone *should* sound like must be made collaboratively—and it’s not always pretty.

Having worked as part of the Red Hat Marketing Communications Content team for seven years, I have learned that humans are often confronted with the reality that what we meant to say and what our listener heard were a distance apart, be it crack or chasm. Corporate marketing teams know this distance particularly well. An ad campaign might strike the wrong tone at the wrong time, like Pepsi’s controversial 2017 campaign, starring Kendall Jenner, that trivialized the Black Lives Matter movement (Victor, 2017). Or an Americanized headline with a clever inside joke might mean something completely different in another English-speaking culture. Or a brand might make outrageous claims about their product without providing proof, causing consumers to be skeptical not just about that product but about the brand itself. Or any of a thousand other ways that professional writers, and marketers in particular, might miss the mark with their intended audience and lose some of their company’s credibility in the process.

This dissertation focuses on the voice and tone of Red Hat, a large technology company with a passionate company culture, during a unique period of rapid growth and brand evolution from 2018 to 2020. The company’s ethos is firmly grounded on the principles of open source software, or “software with source code that anyone can inspect, modify, and enhance” (opensource.com, 2020). Consequently, the company prizes collaboration, transparency, and

meritocracy in its culture, which in turn is reflected in how it positions its corporate voice. Understanding how that voice is collaboratively crafted and maintained creates a compelling opportunity for analysis in an organization that differs from traditional communication hierarchies. Drawing on my studies of rhetorical criticism in digital environments, I hope to explore what happens to the perceptions—both internal and external—of an organization when its core identity is challenged by change.

In this first chapter, I begin by introducing the subject matter, definitions, and relevant literature I will be using to shape the theoretical lens for my analysis. Next, I provide a case study overview of Red Hat and describe its evolving rhetorical situation. With a study in each of the next three chapters, I look at how Red Hat's different audiences try to determine what is and is not authentic to its corporate voice and tone. In Chapter 2, I analyze my interviews with members of Red Hat's Global Content team, who are responsible for writing and editing much of the company's public-facing marketing material. In Chapter 3, I discuss the results of a broad, internal survey asking other Red Hatters what they think of their company's corporate voice and tone. In Chapter 4, I pair a rhetorical analysis of Red Hat Summit 2019, the company's flagship marketing event, with a small survey and interviews conducted with attendees on site. In Chapter 5, I conclude by considering the practical and theoretical implications of these studies for audience-centered professional writing and offer a path forward for more collaborative research.

### **Literature review: audience as common ground**

Marketing and rhetoric share a lot in common: They are both more persuasive when a specific message is sent to a specific audience at a specific time using specific means of delivery. The American Marketing Association (2017) provides this definition of marketing, as “the activity, set of institutions, and processes for creating, communicating, delivering, and

exchanging offerings that have value for customers, clients, partners, and society at large.” Rhetoric, in turn, has been defined and redefined for more than 2,000 years. Going back to Aristotle, we understand rhetoric as “the faculty of observing in any given case the available means of persuasion” (1355b). It is often defined specifically in terms of making compelling arguments, particularly in the realms of politics and the public sphere (Black, 1992; Hauser, 1999; Zarefsky, 2008). It could be understood more broadly, like Lunsford’s (1992) definition as “the art, practice, and study of human communication.” For my purposes in this dissertation, I prefer the definition from *The Silva Rhetoricae*, that longstanding online resource on rhetoric maintained by Dr. Gideon Burton at BYU, which observes that “rhetoric is the study of effective speaking and writing” (2001).

Both marketing and rhetoric also suffer from a reputation as being mere fluff, adornment, empty, or shallow. I will not attempt to single-handedly dispel all criticisms of both, or either; rather, I am interested in bringing my years of graduate work in rhetoric and digital media to bear in a new environment, narrowing the parameters of that contribution to rhetorical style and corporate voice and tone, and to find practical intersections of the two fields that can benefit both.

I am certainly not the first to do so, and I recognize the need to build a scholarly base upon which I can add my own research and perspective. I am joining the conversations of business studies academics who have looked at how Silicon Valley companies find their external, or brand, voice (Black and Veloutsou, 2017; Garklavs, 2016; Schultz and Block, 2015; Lopez, 2014; Keller, 2009; Bright, 2005), of scholars who have applied classical principles of rhetoric like *ethos*, *kairos*, *elocutio*, and more to modern digital environments (Iversen 2017; Morey, 2016; Isaksson and Jørgensen, 2010; Porter, 2010; Fleckenstein, 2007; Hyde, 2004;

Miller, 2003; Warnick, 2010), and of critics who find it important for the health of a functioning information society to investigate the rhetorical communication decisions made by the big names in Big Tech (Ozer, 2019; Sternberg, 2018; Rugnetta, 2018; Knight, 2017; Wachter-Boettcher, 2017; O’Neil, 2016; Marino, 2014). It is my hope that this dissertation contributes in meaningful ways to all of these areas.

First, though, it is fair to ask why tech industry marketing matters at all, and to whom. The ever-growing influence of technology companies—from economics to culture to the fundamental fabric of modern society—impacts our daily lives in countless ways. Given the numerous channels used in business-to-business (B2B) marketing to support sales and increase brand awareness, it is fair to consider these tools—and the underlying assumptions of their usefulness—and their impact on how audiences interact with tech companies. Second, critics within the tech industry have called for closer examinations of not just how we use its apps and products, but how we should consider the ethics of both the industry itself in general and the impact of company culture and communication on those ethical standards, or lack thereof, as Coldicutt (2017, n.p.) puts it: “As an industry, we need to be continually monitoring, and thinking deeply and strategically, about the consequences of the decisions we make. We need to take responsibility.” My own dissertation research would fall short, then, if it failed to consider the rhetorical choices of Red Hat’s marketing voice construction and the networked infrastructure that delivers it.

My project sits at the intersection of digital rhetoric and corporate brand studies, with an emphasis on the canons of ancient rhetoric revisited for digital environments and within rhetorical communities. As I see it, this project can contribute meaningfully to numerous academic fields, helping to further our understanding of rhetorical studies and digital community,

with additional impacts to organizational communication, marketing and ethos, and brand identity. However, I also recognize that I am long removed from active, meaningful participation in those or any other academic fields; therefore, on the continuum from academic contributions to industry contributions, this writing might find itself more at home toward the latter. That said, I know the best way to keep this research from contributing to *any* conversation is to keep it to myself, so it will be through future collaborations with town and gown alike that this research will find its footing and make an impact beyond these pages alone.

In lieu of a dedicated chapter for a literature review, I will include here the relevant concepts, theories, and frameworks that will inform my research over the next few chapters, expanding on them as needed within the context of each study. The bulk of my focus was aimed at how classical rhetoric could help us understand the new and evolving digital environments and media we use to communicate. Or, as my mother has tried to explain to her friends who ask about me, I “study the internet and how it’s different than when we were kids. You know, like Facebook and how it changes us? And Aristotle is involved.”

She is not *that* far off. In my studies, I did use traditional tools and concepts of classical rhetoric to argue that internet memes and internet culture relied on community-building, *kairos*, intertextuality, and ethos to construct meaning, and that remix culture was a new form of invention, and that rhetorical criticism needs to consider the networks—both infrastructure and social—when analyzing online communication. And though my research topic today is a sharp departure from cat videos, much of the same principles apply to understanding context, intention, and audience. Consider, for example, the classical rhetorical canon.

### **Classic canons for a digital world**

Predating Aristotle himself, the classical canon has ebbed, flowed, and been reconfigured

in our field for two millennia (Welch, 2001, p. 107). For digital media studies, it can offer explanatory inroads to studying a diverse host of technosocial phenomena. These illuminations can come from research on particular canons, as Lanham (2006) and Porter (2009) have done have done with style and delivery, or on their applicability as a whole, as Parrott (2010) does.

Lanham, in particular, uses the canon of style to interpret the societal paradigm shift from an industrial economy—where "stuff," the physical products, are king—to an attention economy—where "fluff," the intangible digital information, rules (2006, p. 13). Lanham lays out a matrix of style/substance that helps us oscillate our attention between the surface-level features of information. “At one end, the through idea. Minimal awareness of an expressive medium. At the other end, the at ideal. Maximal awareness of how we say what we do, or paint it, or sound it out” (p. 159). For example, if I **SUDDENLY CHANGED MY FONT** here while discussing Lanham and his oscillation of through v. at, you might stop looking through my writing for its meaning and start looking at how I’m writing it. Perhaps you just read that sentence when you got to the top of this page and it jumped out at you, diverting your attention from the introduction I was making.

Lanham argues that this oscillation can be cognitively exhausting when done accidentally, but rhetorically effective when done deliberately. For the writer, “you realize how, inevitably, what you say is changed by how you say it. You become acutely aware of style” (Lanham, 2006, p. 258). Red Hat writers, as I will show in Chapter 2, value writing that is clear, but is their idea of clear writing the same as yours or mine? Lanham argues that the through/at spectrum also exists for perceivers as well as senders. “Signals of all sorts bring with them their own suggestions, then, about where they might be placed on a spectrum of formal self-consciousness. But we can choose, if we like, to ignore these indications and bring a different

kind of attention to the experience” (p. 162). In other words, an audience brings its own ideas of what is or is not clear, or what a company should or should not sound like, in a “self-conscious mixture for both writer and reader” (p. 81). For marketers at Red Hat, this mixture is executed across ad campaigns, in technical content on redhat.com that ranges from expert to novice, at hosted events, in branded journalism, and in hundreds of other digital mechanisms available to savvy content creators. Style, then, or *elocutio*, is an appropriate field of work to draw upon to understand the nuances of corporate voice and diverse audiences.

If voice is style, then tone is delivery, the part of rhetoric that focused on speaking and body language. Porter (2009) offers a compelling argument on the revival of the rhetorical canon specifically geared for digital discourse, arguing that “understanding how the range of digital delivery choices influences the production, design, and reception of writing is essential to the rhetorical art of writing in the digital age” (p. 208). He prizes technical knowledge, and argues:

The *techne* of digital rhetoric required here must be of two types: (1) productive how-to knowledge—i.e., the art of knowing various technological options and knowing how to use them to achieve various rhetorical effects; and (2) practical judgment, ethical *phronesis*—i.e., the ability to ask and answer critical questions about one’s choices, such as what serves the common good, what are the human implications of various options, who is in/excluded, who is helped/hurt, who is empowered/disempowered by various technology designs? (2009, p. 220)

These types of *techne* are the digital equivalent of learning what Lanham says of delivery, “You had to learn how to gesture as well, since more people could see you than hear you. From this necessity, grew a whole vocabulary of gestures. Each aimed to create a specific emotion or underline a specific kind of argument” (p. 23). Emotions are held by the audience you address, and can be stirred with the right persuasive elements (an appeal to *pathos*), but here we

see in particular that much of how you are interpreted as a speaker (or writer) is up to the experience of the audience, which is why rhetoric and marketing alike must write with the audience in mind. As Lanham observes, delivery involved “communicating the message in such a way that it would be accepted and attended to rather than refused, ignored.” (p. 24).

Rhetoric, as Zarefsky (2008) argues, offers us “a perspective that accounts for the production, circulation, reception, and interpretation of messages” (p. 635). Each of these steps is important to my understanding of the Red Hat voice, and the emphasis in particular about these steps in Red Hat’s various communities that compose its audience, so is there something more we can take from digital rhetoric in particular? A malleable description of that work might suffice here, as Zappen (2005) provides: “Studies of digital rhetoric help to explain how traditional rhetorical strategies of persuasion function and how they are being reconfigured in digital spaces” (p. 319). And while we are on the subject of definitions, I would draw still further on Zarefsky (2008) to mark my role as rhetorical critic. “Just as the nature of argumentation is sometimes misunderstood,” he says, “so too is the nature of rhetorical criticism. For some, criticism suggests condemnation or faultfinding, but most critics see themselves as analysts, not complainers” (p. 632). He goes on to explain:

Finally, it is important to clarify why one engages in rhetorical criticism and why it is a valuable mode of inquiry in its own right. Explicating how rhetorical texts or actions “work” and why they matter is valuable in enabling people both to be appreciative of the artful use of rhetoric and to be sensitive to the possibility of its abuse. **In addition, criticism enables one to assess whether and how particular works perform the two principal functions of rhetoric: building community and inspiring people to achieve collective goals.** The first function is performed as the rhetor identifies with the audience, establishing and strengthening common bonds among people and thereby constituting otherwise isolated individuals as a public with shared interests and values. The second is

performed as the rhetor articulates a vision or goal and motivates an audience to seek and pursue it. By explaining how this work is done in particular cases, rhetorical criticism offers models for appreciation, insights for possible emulation, and instances of abuse for condemnation. (pp. 638–39). [emphasis mine]

In this dissertation, I am taking Zarefsky's focus on the public sphere and extending it into how corporate marketing fulfills those two principal functions of rhetoric, paying special attention to the technological functions that enable digital marketing to customize Red Hat's messages, and to inquire as to how open and transparent the means of delivery are. His emphasis on community offers a way of thinking about different groups of writers at Red Hat by way of several different kinds of communities.

## **Community**

In addition to the canons of rhetoric, notions of community provide another supporting foundation for my research. McMillan and Chavis (1986) refer to groups having a "sense of community," which consists of four characteristics:

1. Feelings of membership: A sense of belonging to and identifying with the community;
2. Feelings of influence: A sense of having influence on and being influenced by the community;
3. Integration and fulfillment of needs: A sense of being supported by others in the community while also supporting them; and
4. Shared emotional connection: A sense of relationships, shared history, and a spirit of community.

Red Hatters form strong senses of community around the company's emphasis on culture based on the principles of open source. Multiple communities exist within the company, of course, and one person can be a member of several at the same time. Examining different types

of communities can help me focus my research on the applicable parts of the company concerning its voice and tone.

*Communities of practice* are one type of community, frequently formed in professional writing environments and organized around a common activity or interest. A writers group or book club are easy examples. Lave and Wenger (1991) pay special attention to how new individuals are welcomed by established members into communities of practice through socialization, enculturation, and sharing information. A new member is “transformed into a practitioner, a newcomer becoming an old-timer, whose changing knowledge, skill, and discourse are part of a developing identity—in short, a member of a community of practice” (p. 122). *Discourse communities* are another type, identified by Bizzell (1992) as “a group of people who share certain language-using practices...[that] regulate social interactions both within the group and in its dealings with outsiders.” Group members share, debate, and accept different concepts that become “canonical knowledge [that] regulates the world views of group members” (222). The way language is used within the group is a primary focus of discourse communities, which can emerge anywhere that a group of people share a common expertise and discuss that expertise with a goal of advancing the community’s interests (p. 227).

In Chapter 2, I will explore how corporate marketing writers in highly collaborative environments bring new hires on board, with much of the focus surrounding these practices of writing in communities. Later, in Chapter 4, I will look at how these and other communities attempt to adjust to rapidly changing notions of identity within an evolving rhetorical situation.

### ***Kairos and the rhetorical situation***

Finally, the third supporting foundation for my research is the rhetorical situation and the

role of *kairos*, a Greek word roughly translated as the right or opportune moment for action.<sup>2</sup> Ancient Greeks had two concepts of time: *chronos*, the quantitative linear measure of passing, and *kairos*, the qualitative moment of opportunity that you can sense but rarely measure. *Kairos* was depicted as a god, the happy son of Zeus, with a prominent forelock on his otherwise bald head. The idea was that *Kairos*, representing the opportune moment for action, could be seized by his forelock when he arrives but once he passes by he's out of your grasp. Surely, we have all experienced the feeling of thinking of that perfect joke or comment but missing the chance to use it, then painfully realizing it is too late once the conversation has moved on.

*Kairos* has also been something of a sticky wicket in rhetorical studies for the last few decades. Since Bitzer first published "The Rhetorical Situation" in 1968, rhetoricians like Vatz (1973), Biesecker (1989) and Edbauer-Rice (2005) have challenged his original argument that rhetors seize the kairotic moment in response to an exigence created by the situation. Bitzer argues that the rhetor discovers exigencies that already exist, while Vatz argues that exigencies are created for audiences through the rhetor's work. As Krause (1996) puts it:

Since situations precede and call into existence rhetorical discourse, it stands to reason (according to Bitzer) that not just any discourse is invited; rather, the rhetorical situation created by the convergence of exigence, audience, and constraints "invites a fitting response, a response that fits the situation"(10). This too recalls Plato's description of the role of *kairos* given in the Phaedrus, where Socrates' "appropriate" speech on love comes only at the fitting opportunity, after the "inappropriate" speeches have been recognized.

Biesecker, meanwhile, argues that the binary of the rhetorical situation as represented by the Bitzer-Vatz debate is a false one, and that we need to consider other possibilities. For her, "the audience" should not be understood as a known and pre-existing "given" that is influenced

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<sup>2</sup> Also the name of my dog.

simply by the rhetor. Instead, audience and rhetor alike are never settled or finished or established, but are always in the process of being constructed. Edbauer-Rice, in turn, offers an ecological model of the rhetorical situation, and may be more relevant to my purposes here. Instead of a relatively closed or self-contained system, she argues that a “distributed or ecological focus might begin to imagine the [rhetorical] situation within an open network...We might say that rhetorical situation is better conceptualized as a mixture of processes and encounters; it should become a verb, rather than a fixed noun” (2005, p. 14). A unified, hybrid perspective like Edbauer-Rice’s argues that *kairos* is a rolling cycle between rhetor and audience, an ouroboros of co-created rhetorical situation. That means that, as the audience for a rhetor changes—either in number, in type, in breadth, or over time—the rhetor’s reaction to the kairotic moment evolves as well.

I am not here to rehash the debate on the rhetorical situation or cover it in painstaking detail; rather, in my dissertation, I want to examine how *kairos* can be explored to interpret the mechanisms of corporate marketing and digital rhetoric. Marketing, public relations, and corporate communications in general certainly rely on timing and strategic placement of information at the right time, in the right outlets, from the right voice within the company, and addressing the right trends within the tech industry. It is up to each organization, of course, to define “right” in these instances; for Red Hat, it is a matter of what messages will depict the company as a trusted leader in open source specifically, and IT more broadly.

Take, for example, how the company promotes its Red Hat Summit event and attempts to get 8,000+ people to register between January and May. Early-bird conference pricing may be the thrust of initial promoted ads and emails, while the specific content of breakout sessions and hands-on training may be the featured message as the event draws closer. Red Hat’s marketing

decision makers establish goals for the teams to accomplish, which they do by changing the tone for audience segmentation and planning staggered communications in the months leading up to the event to attempt to increase registration numbers in key demographics at key milestones.

These challenges and more can be seen in the creative development process that produces a unique conference theme each year at Red Hat Summit. Months of work go into creating a theme that can anchor the attendee experience onsite and online, and two major events leading up to Red Hat Summit 2019—the Open Brand Project and the IBM acquisition—forced internal teams to reconsider what the company’s voice should sound like in response to both. In Chapter 4, I analyze in more detail that rhetorical situation and the evolving responses it produced for Red Hat’s voice and tone.

### **Defining voice and tone**

Given that my research will focus on Red Hat’s voice and tone, it is worth pausing here to define what those two things mean and how they differ from each other. Multiple explanations about marketing voice and tone can be found in business examples. I could use the definitions from Fenton and Kiefer Lee (2014), who say, that “while your voice is more about you, your tone is about your readers and how they feel” (p. 61). Mailchimp, the popular integrated marketing platform, has been an inspiration for my research from the beginning. The company owns the URL [voiceandtone.com](http://voiceandtone.com), which now redirects to Mailchimp’s style guide, and offers this helpful summary:

What’s the difference between voice and tone? Think of it this way: You have the same voice all the time, but your tone changes. You might use one tone when you’re out to dinner with your closest friends, and a different tone when you’re in a meeting with your boss.

Your tone also changes depending on the emotional state of the person you're addressing. You wouldn't want to use the same tone of voice with someone who's scared or upset as you would with someone who's laughing.

The same is true for Mailchimp. Our voice doesn't change much from day to day, but our tone changes all the time.

New Kind, a consulting agency that specializes in brand strategy for B2B tech companies, offers not a definition of voice and tone but a reminder of the need for it:

No matter who's behind the keyboard, it's a shared responsibility to create compelling communications that will resonate with your target audience. And it's not just *what* you say. It's how you *say* it. Without fail, the strongest, most compelling communications come from organizations who invest in getting them right from the start. Putting equal stock in both what they say and how they're saying it. Honing not only their messaging strategy, but also the style and nuance behind those messages. (Armes, 2020) [emphasis original]

Both what a company says and how it says it can impact how its audience perceives it, but the audience brings as much to the table as the speaker or writer. That's why I like Anna Pickard's definition in a keynote at Adobe's 99U conference. Pickard (2019) is the head of Brand Communications at Slack—a self-described “voice and tone lady”—and argues:

Voice and tone are two different things, **voice [is] about knowing who you are**, it's your internal kind of sense of who you are as a company, your values, your brand, the motivations for why you sound how you sound, it's the base you build on. And **tone is about how you sound in the world**. So, modulating that and making sure that you're talking to your audience and you know who your audience is. Where you're talking to them, how you're talking to them: That's tone. One's more internal, one's more external. You can't do one without the other.

How you communicate with the voice is projecting. How that voice comes off to your

audience is perception. The old adage largely holds up: “It’s not what you say, it’s what they hear.”

Voice and tone are intrinsically linked and often get lumped together. But knowing the difference, how they are used, and why that matters is an important element to my research. One company can present a wide array of different tones and still be considered a consistent voice—if the contexts are appropriate. For example, Red Hat typically prefers to appear trustworthy and conversational, so its marketing typically wouldn’t use an exclamation point (the corporate style guide advises against it), but there are times on Twitter or Instagram when an exclamation point or emoji might be used for a more casual tone to show off the “fun” side of a giant corporation. But using exclamation points, emoji, or other text abbreviations like LOL or WTF on the redhat.com homepage would be outside of its audience’s expectations and could impact its credibility.

Though I include some analysis of tone like this throughout the rest of this research, I want to be clear about my methodological approaches of differentiating voice and tone in this dissertation. I explore the concept of *voice* largely through in-depth interviews in Chapter 2 with Red Hat writers, who are responsible for creating and delivering corporate marketing messages. Interview questions are centered on the decisions that writers make to represent the Red Hat voice to the world, and what accounts for the gap (when it occurs) between what they intended and how it gets interpreted. In Chapter 4, I also examine rhetorical considerations of the corporate voice at Red Hat Summit, which must address mixed audiences across multiple contexts. In Chapters 3 and 4, I focus more on the *tone* of those messages and how they are received and perceived by internal and external Red Hat audiences, through surveys of Red Hatters and attendees at Red Hat Summit 2019. My research approach here is rhetorical and not

linguistic; therefore, an in-depth analysis of which parts of language in text or speech would be more closely associated with tone and which would be more identified with voice is outside the scope of this dissertation. However, I plan to continue that analysis in my career at Red Hat, and the work of the studies I conduct in the following chapters here forms the strong foundation upon which my future research will build. For that, I need to show how voice and tone are part and parcel of Red Hat's culture.

Pickard extends our understanding of voice and tone by tying them more closely to company culture. "The culture turned inward creates our product. The culture turned outward creates our brand." Company culture is more than what executives say at all-hands meetings or whether there's a holiday party or a ping-pong table in the office. Company culture is co-constructed by employees and leadership alike, every day, through thousands of interactions among employees about what the company does and how it does it. Pickard describes this process by saying "the way that we use Slack influences the way that we build Slack. And the way that we talk, the way that we communicate, the way that we deal with each other as colleagues, ends up being the way that we deal with the world." This is especially important for a company like Red Hat, which prides itself more than most on drawing its success from the strength of its company culture and the loyalty and passion of its employees.

Finally, as a student of rhetoric, what draws me especially to Pickard's perspective on voice and tone is her emphasis on emotion and timing:

In a world where everything is human, or pretending to be human, people increasingly need to feel seen. Every experience has these cadences, these moments of emotional connection. And those are the moments that really count. Those are the moments where people learn to identify with you, because you're identifying with them. Where they can choose to push you away or hold you closer.

Though she does not call the rhetorical tools by name, the parallels to *pathos* and *kairos* are there, and both will factor significantly in my case studies.

Definitions, by nature, are certainly vital to restricting our scope of inquiry. Waymer (2017) approaches voice and tone via public relations (PR) specifically, relevant here because Red Hat's PR department is within Marketing Communications. Waymer draws on several scholars who "theorize and view public relations as a form of organizational rhetoric – whereby no matter who is speaking on behalf of the organization, it is the organization speaking, not the individual." This identifies one of the thorny complications of metonymy in voice and tone studies. Waymer writes, "logic would tell us that the corporate voice cannot represent adequately multiple, competing interests, simultaneously, and yet that is precisely what many stakeholders and publics expect organizations, including government and corporate actors, to do" (p. 215). Any content about any official company might be misinterpreted as representing the company's views as a whole.

This tension, between what a company officially deems a part of its voice and what its audience interprets beyond that, creates a significant challenge for Red Hat's consistent representation of the brand in digital media alone. Take its website, for example. Throughout this dissertation, I refer to [redhat.com](http://redhat.com) as the primary, public-facing website and core of the corporate voice. But ask a large group of people familiar with Red Hat about its website, and some may think of [access.redhat.com](http://access.redhat.com), which is the Red Hat Customer Portal. On this website, customers can go to download the products they have purchased subscriptions for, access documentation, enlist the help of consultants and technical account managers, troubleshoot issues with their products, and participate in technical support forum discussions about all things Red Hat and

open source.<sup>3</sup> The issue of an individual representing the organization is also present when thousands of Red Hat employees contribute to open source communities and don't pretend to hide their association with the company. Any one of these employees who publicly identifies themselves as a Red Hatter then represents the voice of the organization—no matter how technically and restrictively I want to define it.

Red Hat's marketing efforts are not limited to one team alone, but my primary concentration throughout the dissertation will be restricted to its corporate marketing. To differentiate corporate marketing from product marketing, Balmer (2012, p. 424) defines:

Traditional marketing is oriented to consumers and products, while corporate marketing has an explicit organisational focus that includes a wide range of stakeholders and societal ethical issues. Traditional marketing has mainly a product focus, while corporate marketing has mainly an institutional focus (in terms of focusing on corporate identity and the corporate brand).

Balmer (2011) explains that with corporate marketing, the focus is more of a “philosophy enacted via an organisational-wide orientation and culture,” that is “informed by identity-based views of the firm: this is a perspective which accords importance to corporate identities and corporate brands” (p. 1345). As my research will show, Red Hat's identity is based on a strong company culture that is reflected in its company voice and grounded in the principles of open source.

## **Research questions**

Red Hat started as an open source startup with a rebellious brand set to disrupt the operating system market. After two decades of steady growth and maturity as a tech company,

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<sup>3</sup> As of May 3, 2020, there are more than 10,000 discussion threads.

Red Hat is now going through a period of rapid change and its employees are concerned about losing their unique company culture. That growth threatens to upend the company's consistent identity—you can persuade 100 employees to agree on what a company's voice should sound like more easily than you can persuade 10,000 of the same fact. The combination of tectonic shifts in the company culture from within (the Open Brand Project, which evolved the logo and brand system) and from the outside (the \$34 billion IBM acquisition) are followed with a major change in leadership (installing a new CEO for the first time in 12 years), all within a two-year span. It's easy to see a reason for concern. However, to understand any changes to the Red Hat voice, we first must understand how that voice is created and received within Red Hat, and how that voice resonates with Red Hat's external audiences. Therefore, my primary research questions in this dissertation are:

1. How does a company's corporate voice and tone establish its authenticity for employees, leaders, customers, and critics?
2. What role can familiar rhetorical concepts like style (*elocutio*), ethos, and kairos play to help us understand how a company's voice and tone change and adapt to major internal cultural upheavals?
3. In an organization without a traditional, top-down hierarchy of marketing messaging where one leader controls how something should be said, how are collaborative decisions made about what does and does not sound authentic to the corporate voice?

### **Case study overview: Red Hat and open source**

Analyzing how a company reacts to change is by no means a novel idea, and I am sure there is no shortage of academic and industry research to prove it. Restricting that scope of inquiry to technology companies still leaves us with thousands to choose from. What, then,

makes Red Hat a compelling example? For one, it became the first billion-dollar open source company in 2012 (by revenue, not valuation), and became the first \$2b open source company just four years later (Vaughan-Nichols, 2016). As tech blogger Mike Volpi (2019) observed about that rise, “the common thesis was that Red Hat was a snowflake, and that no other open-source company would be significant in the software universe.” But I am less interested in assessing the financial success of technology companies and more interested in what that success means and how they talk about it. As I will show throughout this dissertation, Red Hat asserts itself as unique in the industry because it bases so much of its identity, voice, and business practices on the values of open source.

Originally, open source referred to software with “code that is designed to be publicly accessible—anyone can see, modify, and distribute the code as they see fit” (redhat.com). Volpi (2014) says, “the open source movement arose when developers realized they could create software in a community-driven environment, letting everyone add knowledge in return for sharing in the collective product.” Alongside that community involvement, Red Hat made inroads in the enterprise IT world, disrupting the traditional model of software development and distribution to help establish open source as the standard for IT today, and “no longer a fringe approach to software. When top companies around the world are polled, few of them intend to have their core software systems be anything *but* open source” (Volpi, 2019).

Red Hat is an enterprise software company with an open source development model, which means it collaborates with open source community projects—the “upstream,” where some of the most innovative technologies are created and changed—to develop enterprise-grade products—the “downstream”—that are more stable and secure, so its customers can rely on them to run their businesses. Founded in 1993 in Durham, NC, the company started out in the

retail box operating system market, selling CD-ROMs of its first product, Red Hat Linux, in CompUSA, Best Buy, and similar big-box technology and office companies. The company went public in October 1999, at the height of the dot-com boom. Red Hat expanded its technology portfolio of offerings in the early 2000s and made the decision to stop selling its operating system by retail; instead, the company transitioned to a subscription model and began offering Red Hat Enterprise Linux—which would become its flagship offering—thus marking a deliberate shift from a business-to-consumer (B2C) model to a business-to-business (B2B) model. Technically then, as now, the company owns no intellectual property and makes its code freely available to anyone with an internet connection. Revenues come from subscriptions, which provide customers with support, security, and custom development. Red Hat grew throughout the 2000s, weathered the Great Recession of 2007-09, and evolved from a plucky tech startup to a mature player in the IT field. Cresting \$1 billion in earnings in 2012, the company added thousands of employees and acquired several companies. Since 2002 it has achieved 72 consecutive quarters of revenue growth<sup>4</sup>. As of 2019, more than 90% of the Global Fortune 500 are Red Hat customers<sup>5</sup>, and the company has more than 105 locations in 40 countries. IBM announced its own intentions in 2018 to acquire Red Hat; the deal officially closed in July 2019. Red Hat is now a wholly owned subsidiary of IBM, retaining, through the structure of the deal's relationship, much of the company's independence, including its employees, brand, company culture, products and solutions, and its ethos—as it says on the homepage of redhat.com—as “the world's leading provider of enterprise open source solutions.”

That's *what* Red Hat is, and does. But is that *who* Red Hat is? A company's identity is

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<sup>4</sup> Source: Red Hat Q4 FY20 financials.

<sup>5</sup> As quoted on its website, this comes from “Red Hat internal data, 2019”

more than the sum of its timeline and financial deals. A company's identity is more than its products, more than its reputation, more than its executives, and more than its employees. It is all of those things, not separately but together; its identity represents all of the decisions that brought it to this point in time, and the plans it makes for the future. For Red Hat, that past and future both rely on open source, and its ethos is founded in and grounded by open source. It is important to note that the term itself has since evolved into "a movement and a way of working that reaches beyond software production" using "the values and decentralized production model of open source software to find new ways to solve problems in... communities and industries" (redhat.com<sup>6</sup>). As the New Hire Orientation presentation, which every new Red Hatter goes through in their first week, says, "Values, principles, and practices derived from open source software communities and movements are deeply embedded in our organizational DNA, so understanding them is critical." Open source is a philosophy and approach to developing software, and is defined in opposition to proprietary software. Open source is the core of Red Hat's development model, and the core of its identity.

### **Authentically open: How Red Hat describes itself<sup>7</sup>**

In the boilerplate language at the bottom of every page on redhat.com, Red Hat projects its identity both by what it makes and how it solves problems for its customers:

We're the world's leading provider of enterprise open source solutions, using a community-powered approach to deliver high-performing Linux, cloud, container, and Kubernetes technologies. We help you standardize across environments, develop cloud-

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<sup>6</sup> <https://www.redhat.com/en/topics/open-source/what-is-open-source>

<sup>7</sup> The company is occasionally confused with the Red Hat Society, a women's networking group, or for the Red Hat Amphitheatre music venue (which the company sponsors). The need for a consistent voice to help build brand awareness is keenly felt in the halls of the Red Hat Tower, its headquarters in downtown Raleigh, NC.

native applications, and integrate, automate, secure, and manage complex environments with award-winning support, training, and consulting services.

Open source is important enough to the company's ethos to include it on the homepage in a section called "Red Hat and open source," alongside a broad introduction to its technologies and thought-leadership IT topics. Red Hat offers that, "We believe in collaboration. We believe in choice, control, and freedom. Open source values like meritocracy, community building, and transparency are changing the way we approach business and life." The top of the company's "About" page speaks to its roots as a disruptor in the operating system landscape, but emphasizes its maturity and breadth of its many current offerings:

We revolutionized the operating system with Red Hat Enterprise Linux. Now, we have a broad portfolio, including hybrid cloud infrastructure, middleware, agile integration, cloud-native application development, and management and automation solutions. With Red Hat technologies, companies can successfully adapt as business becomes more digital and interconnected.

We are Red Hat. We've been here for more than 25 years, and we're here to help you face your business challenges head-on.

Links to current IT challenges appear below in a sort of parataxis, with simple titles: "Infrastructure, Integration, Cloud, App development, Automation & management." Headlines throughout the page describe Red Hat as "a trusted leader in innovation" that is "building a better foundation for the future of IT" by offering "freedom and choice with Red Hat subscriptions," all "from the leaders in open source, for the leaders in IT." References to strong company culture are also prominent, saying Red Hat is "only as strong as our people" while featuring a quote from Red Hat's CEO for the last 12 years, Jim Whitehurst (now the president of IBM) about leadership: "The most respected and influential people at Red Hat are those who show passion

for our mission and live it every day. A leader at Red Hat does not rely on their title to earn respect.”

The Red Hat brand standards<sup>8</sup>—called “the source code of our brand”—offer an insightful look into the tenets of the corporate voice and the identity of the brand. A close reading provides insights about the importance of authenticity and what that means to Red Hatters, which is important both to me as a researcher and to this dissertation. In the “Personality” section, Red Hat says, “Brands, like people, have their own personalities. Our brand is open, **authentic**, helpful, and brave. Every interaction with Red Hat should reflect those core traits” [emphasis mine]. The bit about authenticity cuts directly to the core of the voice, as Red Hat says:

We never pretend to be anything we’re not. Internally, we are true to ourselves, our values, and our culture. In public, we’re honest and direct. We’re not flashy or boastful, and we don’t promise more than we can deliver. We don’t understate bad news, or overstate good news. We avoid spin. With Red Hat, what you see is what you get. Like our home state of North Carolina, our motto is “esse quam videri”—to be, rather than to seem.

We speak plainly, honestly, and without hyperbole.

We deliver what we promise.

We let our real customers, partners, and associates tell their own stories.

We keep our design straightforward and direct.

The emphasis here is on a corporate voice that speaks like a human being, conversationally, and not inflated with jargon and boasting. This claim of deliberately using straightforward communication, unembellished by exaggeration or false promises, is an attempt to stick out from the overblown hype that usually cascades out of Silicon Valley, where cutthroat

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<sup>8</sup> <https://www.redhat.com/en/about/brand/standards/personality>

startups compete with each other to attract top talent, big investments, and positive press. In Red Hat's nascent days, it too embodied a flashier, edgier personality in its corporate voice, but as an established, mature player in Big Tech, the company aligns itself with reliability, sincerity, and candid communication as authentic tenets of its identity. That identity, while more mature than its startup counterparts, is still styled as casual and conversational. However big Red Hat gets, the company continues attempting to embrace its programmer ethos that opts for a hoodie over a suit. This positioning is important for the company's corporate voice, and reflects something Abramovich (2013) learned from interviews about authenticity with executives from several prominent consumer brands. A VP of media at Sony Music, for example, offered that, "The original "idea" of authenticity was essentially a way for corporations to attempt to not sound corporate in their marketing efforts — or at the very least to stay true to their essence." Here, "sounding corporate" is somewhat subjective, as a startup might think of Red Hat as too corporate, while Red Hat might think of IBM as too corporate—a key point about authenticity important to a survey I discuss in detail in Chapter 3.

Defining what "authenticity" means to Red Hat and its audience is important for the framework I use throughout this dissertation. In casual conversations I have had with colleagues about this research, authenticity often gets associated with whether or not something "feels" like Red Hat. It's like the old Supreme Court definition of obscenity: you can't precisely describe or define it, but you know it when you see it. That can vary wildly, of course, depending on an individual's relationship with Red Hat. Longtime employees might be more devout in their adherence to open source tools and culture, and could buck against decisions made by the company's leaders that go against that devotion (e.g., using Google Suite for internal IT needs instead of an open source alternative). Customers who have known about Red Hat for less than a

year might notice an advertising campaign touting the company's cloud computing technologies and decide that *feels* right for Red Hat to talk about, while veteran industry analysts might primarily associate the company with its successful, long-running Linux platform technologies. The way Red Hat talks *about* each technology, *to* different audiences can influence whether someone would agree that a word or phrase or claim "feels" like Red Hat. Developing that feeling comes from relationships built on mutual trust and honesty, but for marketers, this authenticity poses a particular challenge. As Deibert (2017) points out, "the irony here is that marketing, by nature, isn't really authentic. It's an all-out arms race as brands compete to showcase their products and services in the most attractive, clever and appealing light possible while simultaneously downgrading their competitors and sweeping any negative commentary under the rug." In Chapter 2, I pay special attention to the importance of building relationships between author and audience in exploring how Red Hat writers collaborate and negotiate the exact language to be used in marketing assets, often by relying on established norms in the company's culture.

Red Hat's brand standards paint the company as above the fray of throwing competitors under the proverbial bus, and instead focus on the relationship between Red Hat and its customers, guided by the principles of open source and company culture. This is reinforced by Red Hat's statements on its company culture, elsewhere in the brand standards<sup>9</sup>:

Red Hat is a company where people can make a difference because they have the opportunity to have a creative, inventive, and collaborative career that they could not have elsewhere.

You cannot succeed and move up at Red Hat by yourself. Red Hat is a meritocracy where reputation is earned by how well you help others succeed. We succeed as an open source

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<sup>9</sup> <https://www.redhat.com/en/about/brand/standards/culture>

technology company when we create more open source winners. And we succeed as individuals when we help create more winners within our ranks.

Through and through, the Red Hat voice attempts to represent the company as a community-driven meritocracy that hinges on transparency, authenticity, and a commitment to open source software and principles. In Chapters 3 and 4 of this dissertation, I will examine those marketing claims about the Red Hat brand when compared to opinions of several groups of Red Hatters to see how well the aspirations of the brand, culture, and voice live up to the experience of the employees.

One of the ways in which Red Hat's employees attempt to live and practice the principles of open source at work is through memo-list, an internal email listserv free-for-all where company news, announcements, and decisions are debated and rehashed. It is one of Red Hat's more than 6,900 internal email distribution lists, and one of a few global lists, with potentially 15,000 readers (every new employee is automatically subscribed, but is not required to continue to subscribe). Red Hat Chief People Officer DeLisa Alexander (2011) called it "a crucial element of the meritocratic culture of Red Hat because it gives every employee an equal opportunity and equal voice to express thoughts, ideas, and opinions." Memo-list is notorious within the company as a venue for passionate, sometimes heated discussion about the company's culture, policies, and leadership decisions. In its earlier days, Alexander said, "the heated debates encouraged passion and brought out valuable new ideas. At their worst, they spread misinformation, were distracting, or were demoralizing to many in the company." In an open, transparent, self-described meritocracy like Red Hat, memo-list serves as a public forum where Red Hatters continuously refine their notion of company culture and what the brand represents. It is what Grabill and Pigg (2012) would call "messy rhetoric," a hub where identity is constituted through

interaction on display for the company to see. They write, “an interactional conception of identity has important explanatory potential for understanding interactions where individuals, often unknown to one another, think together and discuss public issues” (p. 102). This helps us understand how Red Hatters think of the company’s identity—not as a fixed *thing* but as a constant work in progress.

Another way Red Hat shows its commitment to open source is by touting its contributions to upstream projects as an example of good open source stewardship. In the “About” section of its website, you can read that “Red Hat participates in and creates community powered upstream projects. We contribute code, collaborate on content, steward projects, mentor leaders, and sponsor events” and that “Red Hat is the largest open source company in the world. We build and support open source products from community projects. We give back to the community and defend open source—every step of the way.” The “Open Source Program Office” section of the company’s website lists 483 upstream software projects Red Hat directly contributes to, technologically and financially. These choices are part of Red Hat’s corporate voice and reflect how a culture of collaboration, community, and contribution undergirds open source identity. This also addresses critics who say Red Hat merely profits off of the work of others in open source by taking upstream projects and turning them into Red Hat products. Red Hat, in turn, argues that it “hardens” those open source projects into a stable version suitable for enterprises, learns about more capabilities those enterprises need, then introduces those innovations back into the upstream project for the benefit of all. The community-to-enterprise diagram (see Figure 1.1) depicts each upstream project associated with Red Hat’s enterprise product.

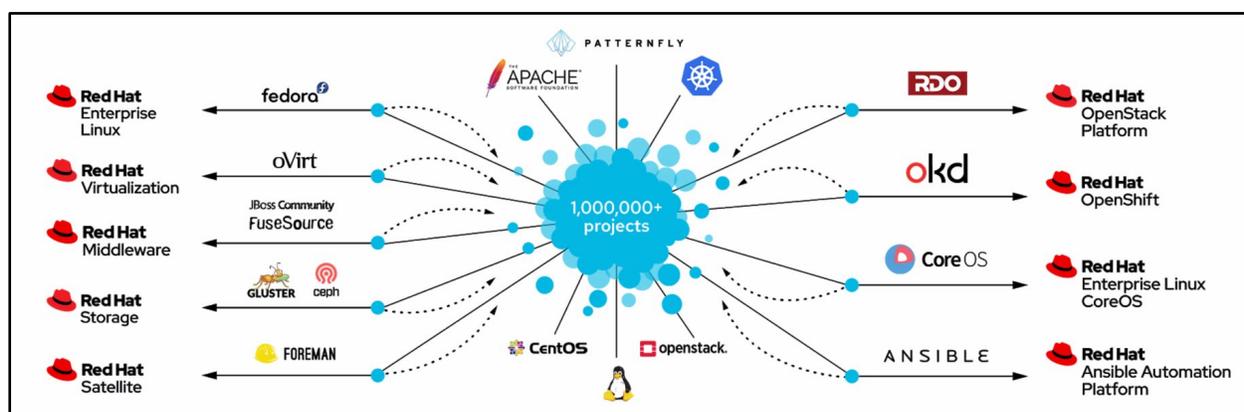


Figure 1.1: Open source projects to Red Hat products community to enterprise model

## About open source

Red Hat’s core identity was founded on and still relies on its relationship to open source, so defining exactly what open source is critical to understanding and analyzing how Red Hat talks about it. Volpi (2019) notes the role of the developer in the rise of open source and its prominence and dominance in IT today:

The software was originally created by and for developers, which meant that at first it wasn’t the most user-friendly. But it was performant, robust and flexible.... While IT still plays a role, the real customers of open source are the developers who often discover the software, and then download and integrate it into the prototype versions of the projects that they are working on. Once “infected” by open-source software, these projects work their way through the development cycles of organizations from design, to prototyping, to development, to integration and testing, to staging, and finally to production. By the time the open-source software gets to production it is rarely, if ever, displaced. Fundamentally, the software is never “sold”; it is adopted by the developers who appreciate the software more because they can see it and use it themselves rather than being subject to it based on executive decisions.

In other words, open-source software permeates itself through the true experts, and makes the selection process much more grassroots than it has ever been historically. The developers basically vote with their feet. This is in stark contrast to how software has traditionally been sold.

As a philosophy of sorts, it is sometimes called “the open source way” at Red Hat (and elsewhere), guided by core principles pulled from the open source software development model. These principles are featured in Red Hat’s New Hire Orientation, the two-day introductory overview to the company that all new employees go through, typically at Red Hat’s corporate headquarters in Raleigh (see Figure 1.2).

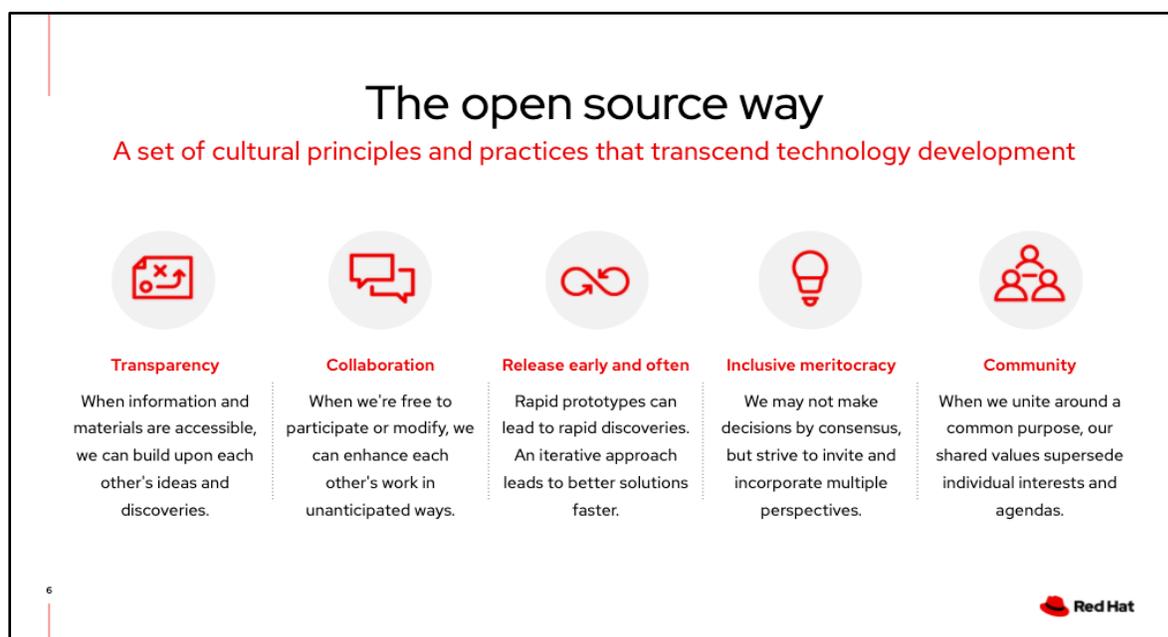


Figure 1.2: Open source values from the introduction to Red Hat at New Hire Orientation

Opensource.com<sup>10</sup> (n.d.) defines the antonym of open source software, as closed source or “proprietary” software, with source code that:

only the person, team, or organization who created it—and maintains exclusive control over it—can modify. ... Only the original authors of proprietary software can legally copy, inspect, and alter that software. And in order to use proprietary software, computer users must agree (usually by signing a license displayed the first time they run this software) that they will not do anything with the software that the software's authors have

<sup>10</sup> <https://opensource.com/resources/what-open-source>

not expressly permitted. Microsoft Office and Adobe Photoshop are examples of proprietary software.

Red Hat argues that the benefits of open source mean “software is often cheaper, more flexible, and has more longevity than its proprietary peers because it is developed by communities rather than a single author or company<sup>11</sup>.” Perhaps paradoxically, open source is often said to be more secure than proprietary software. In his influential book on the rise of open source, Eric Raymond (1999) introduced a now-iconic phrase about security and open source: “With many eyeballs, all bugs are shallow” (p. 30). He also called it “Linus’s Law,” after the creator of Linux, Linus Torvalds. The thinking goes that if your source code is closed, only the people authorized to look at it can search for and find bugs, glitches, flaws, and other defects. If your code is open to the world, more people can comb through it and notice when something is wrong. Of course, enterprises and governments don’t leave their critical IT infrastructure and applications in the hands of just anyone with a keyboard and internet access; therefore, Red Hat makes its subscription-based software portfolio an attractive choice to its customers by offering 24x7 support, working upstream to identify security flaws before they appear in its products, and offering enhanced security services for organizations that need them.

Red Hat’s founder Bob Young frequently offered the analogy that “You wouldn’t buy a car with the hood welded shut,” implying that whether or not you possess the technical expertise to fix your own engine, you should have the right to, because:

it gives us, the consumer, control over the product we've bought and takes it away from the vendor. We can take the car back to the dealer; if he does a good job, doesn't overcharge us and adds the features we need, we may keep taking it back to that dealer. But if he overcharges us, won't fix the problem we are having or refuses to install that

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<sup>11</sup> <https://www.redhat.com/en/topics/open-source/what-is-open-source>

musical horn we always wanted -- well, there are 10,000 other car-repair companies that would be happy to have our business. (Young, 2000)

Seven years ago, when I explained my new job at Red Hat to my septuagenarian parents who have never worked on their own cars, I used the analogy of recipes. A recipe card contains the information you need to make a dish, but you are not obligated to make it exactly as the author does. Maybe you have a gluten allergy, or like your food extra spicy, or don't have all the ingredients on hand—whatever the case, you can make substitutes. But open source is more than just the option to change things. The emphasis on collaboration means that when you make improvements to the source code, you share those with the community in which you found them for the benefit of everyone.

Though open source is arguably now the default method of developing software, it was a small but growing threat to the dominant IT paradigm when Red Hat was founded. Red Hat started out as a David challenging Goliaths, which contributed to its early identity as a rebel and a fighter and a pioneer. Today, the company presents itself as an established, trusted guide in enterprise open source. Red Hat went from the scrappy startup bucking the status quo to the status quo in enterprise open source, and there are many still in the company who cling to the older identity and feel it is being threatened by massive changes to Red Hat, like the Open Brand Project, IBM, and Jim Whitehurst leaving to become IBM's president.

### **Red Hat's corporate marketing organization**

To understand how collaborative teams at Red Hat operate and organize, it helps to understand the company's leadership. As Schein (2009) observes, when it comes to understanding organizations and how they function, "culture and leadership are two sides of the same coin and one cannot understand one without the other" (p. 3). Red Hat's president and

CEO, Jim Whitehurst, was tapped to take over as the president of IBM in April, 2020 (though it was announced in January of the same year). Red Hat passed the mantle to Paul Cormier, who has been at the company for more than 20 years, serving as executive vice president and president, Products and Technologies, for more than a decade. He is the first engineer to lead Red Hat as CEO, and as tech blog siliconANGLE notes, “Red Hat may be a lot bigger than it was when he joined, but Cormier said it has never lost touch with its roots in open source, where ‘all the innovation has moved,’ he said. The company has also had a knack for picking a long-term view and sticking with it” (Gillin, 2020).

The C-suite executives who report directly to Cormier include the heads of Finance, Global Sales and Services, People (what would be called Human Resources at most organizations), Legal, Information Technology, Products and Technologies, and Marketing. The Chief Marketing Officer (CMO) for the last four years has been Tim Yeaton, and my research largely centers on his organization. His purview spans a vast and diverse collection of teams, including those on the technical side of marketing (concerned with data analytics, digital marketing, web experience, and user experience [UX]), those concerned with specifically supporting sales, and those in Marketing Communications who are responsible for using the Red Hat voice to represent the brand, the portfolio of technologies, and the company.

Marketing Communications is led by a Vice President and Red Hatter with 20 years of experience who comes from a public relations (PR) background. The VP’s team is also sometimes called Corporate Communications, and includes the following sub-teams:

- Brand and Design
- Content
- Contact Strategy and Customer References
- Corporate Communications

- Events
- Partners

The Content team is the focus of my interviews in Chapter 2, but all of the teams in Marketing Communications are responsible for Red Hat’s corporate voice and tone. While all of Marketing Communications reports up to the CMO, not all of Red Hat’s marketing activities are confined to Yeaton’s marketing organization. Within the Products and Technologies organization are teams for product marketers, product marketing managers, and product managers—the more traditional product marketing Balmer (2012) defined earlier in this chapter. With thousands of marketers distributed across Red Hat, collaboration is an absolute necessity for coordinating and unifying the company’s voice and tone. But a unified company voice is the outcome; the process of how Red Hatters negotiate that collaboration presents an interesting opportunity to understand the internal rhetorical community of content contributors and how decisions are made without an editor-in-chief to resolve disputes.

### **Corporate marketing initiatives: a sample of the Red Hat voice**

The teams comprising the Marketing Communications department at Red Hat seek to “simplify, unify, and amplify the Red Hat voice.” Efforts in this area coalesce around dozens of externally facing, high-visibility programs and initiatives. A sample of those programs and initiatives is provided below. I pulled a description of each initiative, where possible, from its corresponding page on redhat.com. Where a description could not be copied, I offer a high-level overview of the purpose and/or structure:

- **Open Source Stories:** “This simple yet powerful belief has transformed technology. But it doesn't end there. Open Source Stories celebrates how community, meritocracy, and a free exchange of ideas can unlock potential across a range of

- disciplines. We hope these stories inspire others to embrace open source in their own work and communities.” (<https://www.redhat.com/en/open-source-stories>)
- **CO.LAB:** “CO.LAB introduces middle school girls to the principles of open source—and to a world of technology and collaboration they might not have considered otherwise. Students learn how to work together to solve problems, develop new ideas, and seek shared experiences to create something unique.” (<https://www.redhat.com/en/open-source-stories/colab>)
  - **Command Line Heroes:** “Stories about the people who transform technology from the command line up. An original podcast from Red Hat.” (<https://www.redhat.com/en/command-line-heroes>)
  - **Red Hat Shares:** “The Red Hat Shares newsletter helps IT leaders navigate the complicated world of IT—the open source way.” (<https://www.redhat.com/en/blog/tag/red-hat-shares>)
  - **The Open Organization:** “The Open Organization is for leaders who want to create business environments that can respond quickly in today's fast-paced world. It's for those who want to encourage the best ideas, hear honest advice, and attract (and retain) the brightest talent.” (<https://www.redhat.com/en/explore/the-open-organization-book>)
  - **Red Hat Summit:** “Red Hat Summit is the premier open source technology event for thousands of IT professionals to innovate and focus on high-performing Linux, cloud, automation and management, container, and Kubernetes technologies.” (<https://www.redhat.com/en/summit>)
  - **Thought leadership campaign:** Positions Red Hat as an IT leader in several key, emerging technologies.
  - **“Our code is open” brand campaign:** Red Hat’s first brand campaign in more than a decade focuses on something so fundamental to Red Hat: “Our code. It’s what drives us and guides every step we take. Always has. Always will. Our code is open. It’s the reason clouds connect and communities thrive. It’s why open source has become the backbone of enterprise IT—and transcended it to confront some of society’s greatest challenges.”

- **Portfolio awareness campaign:** A multi-year advertising campaign designed to amplify other key technologies in Red Hat’s software portfolio, beyond its flagship Red Hat Enterprise Linux operating system. “Open technology built for change. It’s impossible to plan for everything. But with technologies founded on the enterprise Linux, you can be prepared for anything.” (<https://www.redhat.com/en/solutions>)
- **Corporate awareness campaign:** Designed to increase awareness of Red Hat’s brand as a leader in open source and in IT.
- **The Red Hat blog:** A primary hub for the corporate voice, maintained by the Corporate Communications team, that sometimes features guest bloggers. (<https://www.redhat.com/en/blog>)
- **Red Hat brand standards:** “Brand standards are the source code for our identity. They govern how we look and sound in all types of media. They’re the codification of our rules, and important to follow. But, as with other collaborative efforts, they’re a work in progress—always growing, improving, and adapting to meet new challenges. Open. Authentic. Helpful. Brave. We care about the first impression we make, and our brand personality is an important element of who we are. Our brand is open, authentic, helpful, and brave, and we want it to come across in every experience we create.” (<https://www.redhat.com/en/about/brand/standards>)
- **The Book of Red Hat:** “Our shared history, purpose, and culture.” (<https://www.redhat.com/en/book-of-red-hat>)
- **External version of the style guide:** Red Hat’s collaboratively defined style guide, based off of the Associated Press, but with distinctions and explanations.
- **Red Hat Open Studio:** “Red Hat harnesses innovation from hundreds of open source communities to build our products. This development model leads to better software—and that’s why we apply it to telling the Red Hat story. Open Studio wields the creativity of a wide range of contributors to simplify, unify, and amplify our communications. We’re an in-house agency in an open source company, and creativity is our code.” (<https://www.redhat.com/en/about/open-studio>)
- **Customer reference program and success stories:** “Companies like yours use Red Hat technologies to find success. We work across all markets and all over the world, helping organizations overcome obstacles and emerge as candidates for Red Hat

Innovation Awards. View examples of how these companies are resolving unique challenges.” (<https://www.redhat.com/en/success-stories>)

- **Red Hat as a Catalyst series:** “That allowed us to tell stories that had a ‘humanizing the brand’ component, where we could tell stories of social good but also talk a little bit about our portfolio and our technologies.” (<https://www.redhat.com/en/blog/making-creating-chris-creating-and-producing-original-video-series>)

Thousands upon tens of thousands of other documents and media further represent the Red Hat voice. This list also leaves out [redhat.com](http://redhat.com), which serves as the hub for all of these programs and initiatives and to which hundreds of Red Hatters in Marketing Communications (and beyond) devote their time. While this list demonstrates the breadth and depth of the voice and tone Red Hat projects into the world, it also shows us a glimpse of how the rhetorical choices made within corporate marketing craft an ethos, a voice, for the world—and what that voice is meant to represent. As a Red Hat employee who works on many of these projects, I must pause here to consider the relationship between my job and my role as a researcher.

## **Ethical considerations**

As Johannesen (1970) implores, “the honest rhetorician therefore has two things in mind: a vision of how matters should go ideally and ethically and a consideration of the special circumstances of his auditors” (p. 279). It is impossible to separate my research on Red Hat’s corporate voice and tone from my role as an employee of the company. I will be transparent throughout this dissertation about that conflict, and hope to be as self-aware as possible about how my experience might color or affect my interpretation and analysis of the research questions. Here, then, I will describe my job at Red Hat, my relationship to the populations of research participants included in my three case studies, and what unique perspective I can add to this research that an external researcher might not.

My first day at Red Hat was April 1, 2013. I was hired as a contractor through a staffing agency, and I learned of the open position initially from an email forwarded on to Professor Susan Katz by Leigh Blaylock, who was a graduate of the MA English program at NC State. I moved from contractor to full-time employee in December 2013. I joined the Red Hat Content team when the company had around 6,000 employees and the team had seven; the former has since ballooned to more than 15,000 and the latter to more than 50. As the team demonstrated its value to decision makers within the Red Hat marketing organization, we added more people. With more people came more opportunities to distribute the team's writing and editing responsibilities, and eventually I was able to specialize as a copywriter. So, to Red Hat's internal human resources classification software, I went from "Marketing Communications Specialist 2" to "Marketing Communications Specialist 3" in 2016, and from 3 to 4 in 2019. To people I'm connected to on LinkedIn, they saw my job title change from "writer and editor" to "copywriter" to "senior copywriter" to "associate creative director, copywriting" (the Red Hat style guide is big on sentence case, even in job titles).

In practice, that meant that I found an opportunity to carve out a niche on the team to call my own. I moved away from writing product pages about Red Hat technologies on the company's website, and away from editing marketing collateral (e.g., datasheets, whitepapers, technical overviews, and brochures). I started to specialize in writing headlines, taglines, event themes, conference and trade show booth messaging, video scripts, social media, and a host of other related copywriting duties. My job was to craft compelling copy to grab a reader's attention and send them to a marketing resource with more in-depth information, usually created and optimized by a content strategist and teammate. Copywriters grab attention—content strategists hold it.

I became known as a reliable resource for clever copy, turns of phrase, IT puns, and lofty, anthem-style brand prose. I also began to take more of an interest in the creative process and the needs of Red Hat Summit, the company's flagship marketing event held annually since 2005. The event is a project that everyone in Marketing Communications contributes to, one way or another and to varying involvement. A small, core creative team oversees the theme and attendee experience process through from inception to execution. For the last six years, I have been the lead (and mostly sole) writer on that core creative team.

I first began researching Red Hat's voice and tone in 2016. I had been with the company for three years, and in that time I had certainly explored the nuances of headlines and web copy and tweets and all manner of other copywriting duties and team standards that came my way. But the first efforts I can trace to my modern dissertation project were an unfinished effort to gather 40 different samples of externally facing Red Hat writing, spread across web, digital, print, and out-of-home advertising. My Google Drive archive tells me the document was created on November 9, 2016—the day after the general election—and it accompanied a single question above the list: “Do we really sound the way we think we sound?” What began as a curiosity has become a dissertation, and even so it represents only a fraction of what can be learned about the Red Hat voice and why it matters.

## **Conclusion**

In some ways, my research of Red Hat's voice and tone represents the natural culmination of my academic career. My masters in rhetoric and professional communication led me to pursue my doctorate in Communication, Rhetoric, and Digital Media, back when I thought I was bound for a life in academia. And though my path may have changed my curiosity never waned; I now find myself as both practitioner and researcher, applying what I learned to what I

do. So, throughout this chapter, I have attempted to show why Red Hat's corporate voice and tone offer a compelling area to apply the theoretical frameworks I have learned as a doctoral student. I introduced the company and offered an overview of its ethos and organization, defined several key terms we need to understand for the studies I will introduce in later chapters, and contextualized Red Hat's projected identity as a trusted guide in enterprise open source. In the next chapter, I will explore how that identity is constructed by writers on the Content team, and how those writers learn to differentiate between what Red Hat sounds like from what it should.

## **CHAPTER 2: The voice is coming from inside the house**

In the Book of Judges, chapter 12, a defeated tribe of Ephraimites attempts to cross the River Jordan back into their homeland. Many pose as non-Ephraimites and attempt to evade identification. But the victorious opposing army of Gileadites gets there first and thwarts the escape with a simple pronunciation test: say the word shibboleth. Each Ephraimite, as the story goes, pronounces it without the h, “sibb-o-leth,” instead of with the h as the Gileadites do. And so, 42,000 people are killed for mispronunciation.

That word lives on today as... a less severe marker. A shibboleth now can simply be something used to identify that people authentically belong to a group of people. When I first moved to North Carolina from Iowa in 2008, I didn't fit in with the Southern accents around me, but I caught myself slowly adopting speech patterns and words—y'all is a wonderful example, and I'll never go back to saying you all—to try and blend in with my students in first-year composition classes to put them more at ease. I was quickly outed in my second week as being an outsider when I told my class my weekend plans included driving to Topsail Beach on the Carolina coast. I had only ever read the word, and it came out of my mouth as I supposed it should: “Top sale.” They outed me as an outsider because I didn't pronounce it “TOP-sull.” How I thought I was communicating was not how my audience interpreted it. I should have known better than to try and represent myself as something I wasn't, especially to a community I was trying to guide, if not belong to. The concepts of identity and community have been thoroughly established across a number of fields: through in-group vs. out-group behavior in sociology (Goffman, 1967; Tajfel, 1974), or psychology (McMillan and Chavis, 1986), or structuration and communication theory of identity (Giddens, 1984; Hecht 1993). In literature, Fish (1980) offers us the concept of interpretive communities, or a group of people studying a text from the same

perspective, which is reinforced throughout the community as new people join. In rhetoric we find discourse communities, which Bizzell (1992) defines “a group of people who share certain language-using practices” that “regulate social interactions both within the group and its dealings with outsiders” because “canonical knowledge regulates the world views of group members” (p. 222).

As these and other scholars have established, communication is shaped in groups and in context—Red Hat is no different. In this chapter, I blend rhetorical theory with qualitative data gathered from 28 in-depth interviews with members of Red Hat’s Global Content team to explore how the Red Hat corporate voice is constructed. I show how writers join the team, build relationships to learn about Red Hat’s technologies, learn about Red Hat’s culture and the importance of open source to it, and learn how to write about both technology and culture in the Red Hat voice with its style and rules. With mentored, hands-on practice and self-guided research alike, writers build expertise within their communities, working collaboratively while learning to navigate questions of power and authority. I return to these themes frequently as I explore the professional writing practices of collaborative corporate marketing.

In particular, my analysis highlights the role of collaboration within and among multiple stakeholder groups, both within the team and across the organization. Ultimately, this chapter demonstrates that corporate voice and tone are interpreted—and, in turn, shaped—differently by different team members. This analysis, I believe, adds to the academic conversations of community and communication by showing how larger, distributed professional writing teams are challenged to maintain brand voice consistency and authenticity in a context like Red Hat’s, in ways they are not likely to be in smaller organizations or with smaller teams. Using Red Hat as a case study lets me examine how rhetorical principles like audience awareness are critical to

and can influence the design of corporate marketing communication strategies, and shows how the principles of open source culture can influence the success of writers working within it.

And because a company's corporate voice and tone springs not from a single mouthpiece but from interactions with identity, community, and audience, its voice is not solely up to itself to define, either. The voice communicates the company's intention from a constructed ethos, and the tone is what it hopes the audience will hear. But audiences bring their own frameworks, emotions, and experience to the table. Therefore, while a corporate voice is a projection of the company's message, the tone is the audience's perception of that message. In other words, we cannot discuss voice and tone without considering both the writer and the reader, or speaker and the listener, or rhetor and the audience.

This provides us with a reference point for Red Hat's voice and tone. Every group or organization has its share of institutional lore, norms, and core cultural beliefs, and Red Hat is no exception. But, in fact, Red Hat is different from other organizations in the way its corporate voice is shaped, maintained, changed, and delivered. A community of content contributors across the organization is responsible for collaboratively deciding what Red Hat is supposed to sound like—and why. What, then, can we learn about the Red Hat corporate voice and tone by talking to the people who create, shape, and maintain it?

## **The Shibboleths of Shadowman**

Shibboleths can also serve as a sort of code word hiding in plain sight; those belonging to a certain group will recognize what members outside that group do not. In Chapter 1, I alluded to this practice on the Red Hat Content team: if the word *leverage* is used as a verb and appears on any external marketing materials, team members know for almost absolute certainty that said content was never edited by the team. *Leverage* is on the “List of Things Shadowman Would

Never Say,” Shadowman being the nickname of the guy under the hat in the old brand logo and serving as a metonym for the company as a whole. Given the lack of a traditional, top-down hierarchy of marketing messaging where one person decides how something should say, that list of don’ts is not effective as a deterrent by itself without an enforcer to mandate it; however, Red Hatters are much more likely to cleave to the style guide when alternatives to jargon are offered and an explanation for why they are necessary for the brand and company. Instead of *leverage*, the list recommends *use* or *take advantage of*. The list is linked from the corporate style guide, and includes 64 entries, ranging from cringeworthy business jargon like “synergistic” to ineffective portmanteaus like “administrivia.”

Why is the team such sticklers for language rules? It has less to do with prescriptivism and more to do with how Red Hat’s voice should be presented to the outside world. The top of the page reads:

Many companies rely on the language of business marketing to convince people to buy stuff. This language does not work. Why?

--Business jargon can deceive or alienate the uninformed.

--We're conditioned to distrust those who won't level with us.

--None of your friends talk this way. (And hopefully you listen to your friends.)

--It doesn't reflect who Red Hat is.

In addition to the 64 entries, the list explains that writers should avoid jargon, idioms, slang, and narrow metaphors that might be alienating for readers outside the writer’s culture.

“We dropped the ball on this process” could be confusing to readers unfamiliar with sports, and “beating a dead horse” could be a deeply confusing phrase for people who do not speak English as their first language. This list and guidelines show the aspirations to treat Red Hat’s audience with respect, to use inclusive language, and to engage them on a conversational level.

These standards had to come from somewhere, and from someone. Certainly, this list of jargon is not all-inclusive or comprehensive, and certain words made the list while others did not. Those decisions mean that the Red Hat voice is meant to be represented by some qualities, and defined by its absence of others. As Burke (1935, p. 60) would famously argue, “every way of seeing is a way of not seeing,” so the decisions that shaped the Red Hat voice up until now, and the changes in style that reshape that voice today and going forward, can tell us how the company voice reflects its ethos, both from the writers and from the audience.

All of these considerations of style, audience, and voice come down to one central question of authenticity writ large: Who decides what is authentic to the Red Hat voice, and how? Both questions are addressable by studying different communities who engage with the Red Hat voice. Red Hat writers have their ideas about the voice they write in, and other Red Hat employees have opinions about how well the first group does that job. Visitors to redhat.com or attendees at a Red Hat event have their perceptions of what Red Hat sounds like, and whether that resonates with them the way the first two groups think it might. This chapter aims to understand how the Red Hat voice is crafted, altered, protected, and projected by interviewing Red Hat writers. I will turn to the interviews for answers to these questions, but a little context about Red Hat’s unique culture is needed first.

### **Meritocracy and ‘dumb ideas’**

Red Hat has no editor-in-chief, and no individual is charged with overseeing what words and messages are or are not appropriate for the Red Hat voice, or what Red Hat should or shouldn’t sound like. Instead of an arbiter, there is collaboration and coalition, a dispersed group of experts and enthusiasts alike who find common ground in the best interests of the people reading what Red Hat writes and, by extension, in the best interests of how Red Hat positions

itself in the IT industry. The internal style guide, for example, is maintained by a voluntary writer's guild called Word Nerds, open to anyone at Red Hat. They are not empowered with unilateral linguistic authority, so their decisions about style and word choice are, in essence, strong recommendations. But they have earned a level of respect and expertise within the organization through years of collaboration, trust, and data-driven decision-making, and in this way the Red Hat voice can be effective without one person in charge of it.

To understand the distributed nature of messaging authority within Red Hat, it is important to see how the model of this approach is emphasized by company leadership. This lack of singular authority in favor of meritocracy starts at the top, on purpose, and it has been that way at Red Hat for decades. Red Hat's president and CEO, Jim Whitehurst, illustrates this model of how authority is earned, not claimed, in an anecdote from his earliest days at Red Hat (he joined the company from Delta Airlines in 2007):

Our people expect—actually, they demand—to have a voice in how we run the company, ranging from the mission statement to the travel policy. As CEO, I can't simply send orders down the ranks and expect everyone to jump on board. In order to drive engagement and collaboration to the roots of an organization, you need to get people involved in the decision-making process. And you know what? It works. Red Hat is a faster, leaner, and more innovative company as a result.

At Delta, for example, I led a massive organization of men and women who grew up in a world of hierarchy and who reliably followed the chain of command. So I was surprised to realize that at Red Hat, I had to build credibility and influence with the whole team before I could truly make an impact. Early on, I issued what I thought was an order to create a research report. A few days later, I asked the people assigned to the task how things were going. "Oh, we decided it was a bad idea, so we scrapped it," they told me in good cheer.

That's a difficult concept for many of my peers in other companies to embrace. Other CEOs to whom I've told this story have gasped, "What do you mean they didn't do what you asked them to? That's insubordination! You should have fired them." At first, I felt that way, too. But the truth is that my team was right to turn down the job—it either wasn't a great idea, or, just as importantly, I hadn't done a good enough job selling them on why they should jump into it. A leader's effectiveness is no longer measured by his or her ability to simply issue orders. (Whitehurst 2015, p. 17)

Whitehurst came to Red Hat, with its decentralized, collaborative decision-making process, from a company with a more traditionally rigid corporate hierarchy. Saxenian (1994) highlights this as a key difference between companies that followed the model emerging from Silicon Valley and ones that followed a more traditional model, arguing "Corporate hierarchies ensure that authority remains centralized, and information tends to flow vertically. The boundaries between and within companies, and between companies and local institutions, thus remain distinct in the independent-company-based system." Red Hat's internal organization is in line with much of the rest of Silicon Valley, and although a deep exploration of organizational structures is outside the scope of this dissertation, I will argue in the chapters that follow that Red Hat's unique culture is a key differentiator compared to the rest of Big Tech. Red Hat's model of distributed decision-making lends itself to a culture of self-described meritocracy, so in a culture where "the best ideas win," simply claiming a mandate on expertise and authority from your title alone isn't supposed to work, from the highest CEO to the lowliest intern. It follows, then, that without title-based decision-making, employees who are responsible for communicating through the Red Hat voice must have some other processes, standards, and strategies for doing so effectively.

And given the distributed marketing organization within the company—some marketers report to the Chief Marketing Officer, while some report to the President of Products and

Technologies—writers must collaborate across different teams, each with their own practices, priorities, and preferences.

This lack of unity brings me to my first research question of this chapter: Without a central organizing hierarchy, how do writers at Red Hat come together as a discourse community (Bizzell, 1992) or a community of practice (Lane and Wenger, 1991), bound by common bonds? If the Red Hat voice is at all consistent, negotiations and compromises must take place in the collaborative writing process to reach a place where everyone agrees that something “sounds” like what Red Hat would say (or they learn to live with it). And this process brings me to my second research question of this chapter: What kinds of appeals to authority (or other persuasive means) are used within marketing teams to arrive at that place? Style, too, must play a part. These writers have resources to reference, such as the internal style guide, industry best practices, and institutional lore on how the Red Hat voice has evolved, all to help them, as Lanham (2006) points out, “realize how, inevitably, what you say is changed by how you say it” (p. 258). These considerations helped guide my research through in-depth interviews with Red Hat writers.

## **Methods of the interviews**

I organized a series of 28 in-depth, semi-structured interviews with members of Red Hat’s global Content team. Organized under Marketing Communications, the Content team describes its purpose this way: “We write, edit, analyze, curate, translate, localize, and publicize compelling content that reinforces Red Hat’s place as the world’s leading provider of open source, enterprise IT solutions.” What formed in late 2012 with a handful of writers from public relations, brand, and the website teams has grown into a diverse team of teams, with more than 50 people who go by a wide range of self-descriptive job titles and who are grouped into several

sub-teams.

Before I interviewed my first participant, I sought and obtained IRB approval for human subjects research from NC State University (see the informed consent form in Appendix A). Once approved, the interviews were conducted from August to October in 2019, and were held at Red Hat's main office in downtown Raleigh (the Red Hat Tower) as well as virtually with team members who work remotely. Each interview attempted to cover 13 questions that explored the basics, mechanics, and nuances of how the corporate voice shapes the brand identity and daily lives of thousands of Red Hatters. I collaborated with my Content team peers to develop the list of interview questions we would be covering, and in so doing, I discovered several new and relevant topics that, up to that point, I had not considered. Some of my questions on the initial list I devised had a limited ceiling for exploration, and through editing my teammates showed me options for more open-ended, exploratory questions.

Those final 13 questions were:

1. How long have you been a writer at Red Hat?
2. How would you describe your role on the team?
3. How did you learn to write in the Red Hat voice? What resources do you use to stay current and consistent with other writers?
4. In what ways is your writing collaborative?
5. If you could interview the people who read what you're writing, what would you want to ask them?
6. Tell me about the first time you wrote in the Red Hat voice.
7. What are the top three things you correct when reviewing something for style/tone/voice?
8. Is the Red Hat voice effective? Which of the 5 C's do we do well? What would you change, if anything, about it?
9. What are the biggest challenges you face when writing in the Red Hat voice?

10. Can you think of a specific example where you and another internal stakeholder have gone back and forth on several rounds of disagreement and pushback because of a disagreement about tone or phrasing?
11. Walk me through the process of a typical writing assignment for you.
12. Let's talk about what you specialize in.
13. How does the Content team earn trust and authority with internal stakeholders?

I conducted interviews with managers and individual contributors alike, pulling from each of the different areas of focus on the team. The Content team counts among its ranks a diverse group of job roles and focus areas of the Red Hat voice. The Senior Director, who won “B2B Content Marketer of the Year” in 2019 from the Content Marketing Awards, leads the team of 50+ members who round out areas of focus that include:

- **Digital content strategy**, with content strategists who primarily work on redhat.com. (16 team members)
- **Localization and translation**, with program managers, project managers, and dedicated content leads who work to translate and localize each of the eight different languages that Red Hat translates its marketing for. (14 team members)
- **Content marketing and storytelling**, with copywriters who write for campaigns, social media, long-form brand journalism, videos, and events. (9 team members)
- **Corporate messaging and guidance**, with writers and editors who work on collateral, keynotes, and messaging guides. This team also works on the content editing board, which is used for quick-turn editing projects and collateral editing. (8 team members)
- **Analysis and curation**, with curators and librarians who organize, optimize, and analyze marketing assets. (2 team members)
- **Corporate event content**, with event content leads and specialists who manage and organize breakout presentation sessions for internal conferences like Red Hat Summit and Red Hat Sales Kick Off, as well as support speakers and logistics. (2 team members)

It is important to note here that the interviews represent only around 60% of the Content team; several team members declined to participate for valid reasons (e.g., some did not want to divulge details about their work to people outside the team, and some newer folks did not feel they had been at Red Hat for long enough to contribute to the study). Additionally, participants' names have been changed to randomly generated, gender-neutral pseudonyms. I will be using they/their/them pronouns for everyone. In removing personally identifying information from my interview subjects, I am aware that I am also potentially eliding significant implications about gender and race, and how both factor into how Content team members create and sustain relationships within the team and across Red Hat. My experience as a white man in his 30s is not representative of every other team member's experience as a writer at the company; I recognize that my perspective comes with biases—both known and unknown—and the assumptions I derive from the interviews in this chapter deserve a follow-up analysis and further conversations through the lenses of gender and race in technology marketing. (I address the topic of employee demographics at Red Hat further in this dissertation, in Chapter 3.)

Participants were recruited using a team-wide email alias, and informed consent forms detailing the scope, purpose, and process of the study were sent to and signed by the 28 individuals who agreed to participate. Each interview lasted for approximately one hour and was recorded for audio on my iPhone. To analyze each interview, I first transcribed each recording through rev.com. Then, I read through each transcript next to my list of 13 interview questions, noting in the margins where answers to each question came up. Next, I aggregated all of the responses to each separate question in 13 separate documents so I could focus on broad themes that emerged from each question. Following that, I identified those broad themes—presented in this chapter as subheadings on the pages that follow—and connected consistencies and

contradictions across my data sets. I noted answers that did not fit under any of the 13 questions, and fell outside of the broad themes I identified. I looked for sections of this chapter into which those aberrations would make sense in context, and included those that did. None of the interviews followed the exact same pattern or order of questions; the interviews developed more conversationally, with pre-planned questions coming up naturally in discussion of the team and each writer's role. Each new interview was influenced by the one that came before it, and the interviews evolved organically to concentrate more on recurring themes that appeared central to the Content team's approach to writing in the Red Hat corporate voice.

Elsewhere in this dissertation I explore the perception of Red Hat's corporate voice and tone from the perspectives of other Red Hatters and from external audiences at Red Hat Summit 2019. To understand those perspectives, we must first understand the creation, negotiation, and refinement of that voice. And for that, we turn to Red Hat's Global Content team, situated under the Marketing Communications department and alongside hundreds of other Red Hatters tasked with simplifying, unifying, and amplifying the brand's voice and tone.

In the sections that follow, I first show how the Content team sees themselves in relation to the Red Hat voice and tone, focusing on how new writers are initiated, how they learn to write for Red Hat, and how they embrace or reject elements of the voice. Next, I examine their opinions of that voice—what it does well, where it could do better, and what we could learn from talking to Red Hat's audience. Then, I turn to how the team establishes relationships for collaborative writing, both within the team and across the organization. Finally, I explore how the Content team develops expertise to earn the trust of internal stakeholders, and how conflicts about the Red Hat voice arise and are resolved.

## Team roles and backgrounds

Understanding where writers come from can help us understand the way they write. As Lanham (2006) says, “No idea comes to us without traces of the company it has kept.” (p. 19). The participants in my interviews have been at Red Hat for an average of 4.6 years, representing more than 130 years of total Red Hat experience. The most recent hire joined 6 months ago, while the most experienced team member has been at Red Hat for more than 20 years. Four participants came to the Content team from another team at Red Hat. As for what they were doing before joining Red Hat, the team counts among its ranks former members of academia, journalism, public relations, advertising, non-profits, freelancing, web design and development, and video production, among others. Through the course of my interviews, I began to understand how the industries and jobs a writer had come from influenced their relationship to the Red Hat corporate voice, both in challenges with adapting to it and in finding familiarity. Several writers coming from academia, for example, had to try harder than others to make their content concise and clear, but found it easy to cite sources and back up claims to achieve and maintain credibility. Angel, for example, tends to write in longer, more complex sentences, and frequently finds herself having to cut sentences down, break them up, and rearrange. They also turn to a thesaurus frequently, but for reasons practically antithetical to the presence of jargon:

I also find myself using the thesaurus quite a bit to find simpler words. I'm trying to be very careful about the way I'm saying it here, because it's not dumbing it down; it's finding words that are easier to read that still fit the context. So it's more conversational. It's more something if you were talking to someone, they would use in their speech rather than something you'd find in a manual or in a book of prose.

A few ex-journalists expressed their frustrations in trying to make web copy or social media posts more compelling to an unfamiliar audience, but had little trouble getting the

straightforward facts of their paragraphs across. Many interviewees lamented that they did not write as much as they used to or that they would like, but others have more than enough writing to keep them busy.

Some interviewees recalled specific skills honed in their previous roles that help them succeed in their current ones, ranging from technical capabilities like SEO, Drupal, or Adobe Analytics to “soft” skills like emotional intelligence or brand ambassadorship. When the Content team was seven people, it was easy to know what each person was working on, how you could help them, how they could help you, and what challenges the team faced together. With a roster of more than 50 now, that knowledge and familiarity is much more difficult to achieve and maintain—as the team has grown, so too has its diversity of content specialties, and I genuinely had no idea what some team members do in their every work until I interviewed them. That made it more useful to ask how they would describe their roles, instead of asking them to verify my guess as to what their roles are. Leaving questions more open-ended created a lot of opportunities to study the team’s evaluation of the Red Hat voice in ways I did not expect or plan for.

When team members moved from individual contributor to manager, those managers described their jobs as writing less but doing more behind-the-scenes work. Several other members made it clear that they no longer consider themselves to be writers, given the amount of actual writing they do when compared to strategizing, collaborating, and coordinating (“actual writing” here means writing in, for, or about the Red Hat voice and not the general table stakes of email and chat that many jobs include). As Chris, for instance, puts it, “I would say 90% of my job is thinking and emailing and talking to people.” And where I might have described Kelly as a content strategist or web writer who specializes in explaining Red Hat’s position on hybrid

cloud infrastructure, Kelly instead summarized their role more bluntly: “My job is to investigate what people are actually looking for and find connection points between what people want to learn and what we want them to know. Basically, I take the shit that our business unit wants the world to see and package it in a way that people actually want to find it.”

In a similar vein, Jian defines their role as someone who keeps the team’s goals in mind when everyone else might get lost in the weeds of their day-to-day duties:

Right now, I'm the one that asks a lot of questions about why are we doing this and does it make sense, and does whomever we are trying to engage care about what we want to say to them. So, it's not that I'm writing, a lot of times I'm just saying we can't... The way that we said that right there, that's not right. That's not true. We need to redo that. I might be the one writing that, and I might not be, so it's still from the perspective of content and words for sure.”

But while Kelly is a connector and Jian is an asker, both on teams with a lot of support from other content strategists, DJ works on a part of corporate marketing that is significantly more understaffed than other teams. So instead of writing, DJ fashions their role instead as a finder: “Finding the truth, finding information, finding assets, finding the current messaging guide because for some reason it's not shared with me.” In a company based on open source principles, it makes sense that the voice is developed and maintained collaboratively. Not all marketing organizations are set up like Red Hat, so what I am learning from the Content team may not be applicable to all professional writers. But regardless of role, and regardless of previous experience, every writer has to learn how to write as Red Hat. So, how do they learn?

## Learning to write in the Red Hat voice

"I'd say it took me a year to become a good writer at Red Hat. Command of the voice, the tone, our language, knowledge of products, knowledge of the brand itself, all of that. I don't think I had that until I was here for about a year and could actually understand how it all works together. So, I was definitely proficient. I could string words together. I could edit things. I could provide input or strategy on things, but I don't think I would say that it was at my level of good until a year." — Finley

From what I learned in these interviews, it appears that new hires bring new perspectives, adding fresh eyes to a broad roster of established Red Hat writers. Each writer brings style preferences, writing habits, and differing levels of comfort at different stages of the writing process. But all writers need to get up to speed on the basics of the Red Hat voice before they plunge into nuance. And there is a lot to take in at once, so that onboarding process, while more codified and honed than in the team's early days, can be uneven. How, then, does a new hire learn to write in the Red Hat voice and to take on (or challenge) the norms? Let's look at the answer from several perspectives.

### Available resources and tools

Red Hat has an abundance of digital resources scattered across dozens of internal wikis and shared folders. Kullero is a new writer on the team, and is used to organizations where the style guide and consistency are more ad hoc. "Red Hat has way more documentation specifically about voice and tone. The Writing for Red Hat presentation, the Red Hat University materials are so much more than I got in any other organization," they say. Resources like style guides are useful for self-starters, but it can be overwhelming to have too many resources and not enough guidance on which ones to use when or how often they get updated. Taylor, for example, curated their own personal resource list with everything they could ever need, and keeps it open while

editing or writing to cross-reference everything against Red Hat's style guides, products lists, and others. Cameron also had a similar system, with a folder in their browser bookmark bar since their first day and calls it a Writing Toolkit. "Mostly Mojo docs, there's a few other things; one of them is the Corporate Style Guide, the other one is the Shadowman Would Never Say document, and then there are two Copyright and Trademark Notice documents. Those were my Bible when I first started," says Cameron. But that was at the start of Cameron's Red Hat career. "Now," they say, "most of that I have pretty internalized. I probably make a few mistakes every once in a while, but at this point, I feel a little more licensed to be...I'm not just using it; I am also a part of *defining* the Red Hat voice and tone." Kullero, Taylor, and Cameron's comments here illustrate the inculcation process for Content team writers in a community of practice as they are "transformed into a practitioner, a newcomer becoming an old-timer, whose changing knowledge, skill, and discourse are part of a developing identity—in short, a member of a community of practice" (Lave and Wenger, 1991, p. 122).

DJ takes advantage of the particular writing environment and tools of Google Docs, where the team does the majority of its writing and editing. "I check the revision history in Google Docs to see who created something, or to see where it took a sharp departure from successful to confusing or vice versa." The revision history offers a timestamped archive of how a document evolves (or devolves) over time, and the collaborative nature of Google Docs lets writers watch how another writer writes, or pulls back the curtain on the editing process. Dylan also takes advantage of the collaborative writing environment, and remembers how they watched another writer take a case study draft from something barely readable to something engaging that they *wanted* to read. "I watched her live edit the case study, and that was really cool.... Because she is very liberal with changing the writing. It's not just editing. I mean, she was changing

blocks of texts, organizational changes to the text. So, when I started she was editing a lot of my pieces and I got so much good feedback from seeing how she changed things that I was writing.” This allows newer writers to witness individual style identity applied to a common group editing asset.

Several interviewees said how much they learned from simply reading the content on redhat.com. Angel called it their “first calibration of the finely tuned instrument” that is the Red Hat corporate voice. Rene soaked up as much of the language as they could when the first started, and explained, “It's like you kind of become an actor in that way. It's like you get into the Red Hat state of mind and then you just continue it onto the page.” For Jamie, the educational value of the website came from knowing that what is represented on the site is the outcome of the give and take between the Content team and other internal stakeholders:

Sometimes it's not the same as what the style says it should be, but I know that that's the kind of stuff that we're able to get out. That's the stuff that's been through the vetting-editing ringer, everybody's got to approve it, whoever has to hit the publish button said it was good enough to do, so that to me is my... that tells me how I can get things accomplished, and it tells me, okay, this is the starting point. If we're going to improve on it, we have to know why it got to this point first, and then figure out how to engineer something better next time.

My interviews lead me to conclude that resources that focus on context and collaboration help new writers understand the norms and style of the team and the Red Hat voice. Particularly helpful are 1) writing tools that enable team members to collaborate more easily while seeing the process unfold, like Google Docs, and 2) style guides that include not just the rules but examples of misuse, suggestions for replacements, and the reasoning behind the rules. But texts in isolation are only useful if you know how to interpret them in every situation you face. Given the breadth

of marketing content the team is responsible for, that can seem like an impossibility to go it alone. Here, then, collaboration takes center stage, as new writers learn from experienced ones in several different ways.

### **Mentoring, peer review, and Word Nerds**

New writers are mentored by experienced team members, typically for at least the first six months. This offers new writers a chance to learn what Red Hat does and does not say, what counts for compelling content given the context they're writing in, and pushing back on unclear language with the organizational support and protection of a more senior team member who knows and has established relationships with our stakeholders. As new members transition into experienced roles, they too mentor new hires in turn.

The team sets expectations early on that new writers should ask as many questions as they can, because learning to write about Red Hat's technologies while in Red Hat's voice can be a long, challenging curve. At the time of the interviews, Taylor had been on the team for six months, and was just starting to get the hang of things, when Taylor recalls their manager saying, "You are going to have so many questions. You are going to be completely confused for several days, weeks, possibly even months and there's so much information out there, so many things to learn, you cannot feel bad about asking questions. If everyone on the team does their job, no one will ever make you feel bad about asking questions." A mentor who models behavior that encourages curiosity and questions establishes an environment where it's easier for new members to ask for help. That kind of trust, not just between manager and writer but between teammate and teammate, "took a lot of the anxiety away just by prefacing how it was all going to go down.... The good thing is, every question I've ever asked has been met with nothing but patience and kindness, or with, 'No. I don't know. But let me find it,'" Taylor says. Taylor also

benefits when other, more senior writers on the team ask questions in front of the team (in person or on chat) with answers they may have known at one point but have since forgotten, because Taylor often has these same questions as a new writer, and sometimes you find yourself not just not knowing how something works but not knowing how to phrase the question to find the answer.

But this situation does not happen for every new team member. Terry, for example, recounts hearing about that guided mentoring process for other writers: “Yeah so I missed out on, everyone told me, ‘Oh for the first five or six months, you’re not going to be asked to do shit. You’re just going to be asked to learn.’” Terry was assigned to a new cross-functional team at Red Hat, dedicated to working on the website, which he saw as a great opportunity. “But I missed a lot of that ramp up, of it means to write at Red Hat and how to use the style guide.”

That style guide is based on the Associated Press style guide with several Red Hat-specific exceptions and differences (it also includes the list of “Things Shadowman Would Almost Never Say,” referenced in the beginning of this chapter). The guide is maintained and revised by Word Nerds. Formed before the Content team itself, the group is a council that debates language in relation to the IT industry, language in relation to Red Hat’s audience, and language in relation to Red Hat’s brand standards for voice and tone. The group meets once a month, and it’s open to anyone at Red Hat. Understandably, the regular attendees tend to be writers or people with a vested interest in product messaging. (My first meeting at Red Hat was a Word Nerds meeting, and I remember that we spent 35 minutes debating whether “life cycle,” as a noun, should be one word or two—we settled on two). Angel cited Word Nerds meetings as an integral part of learning to write in the Red Hat voice, because “it is a view into how we’re tweaking the voice in real time as a collective group.”

Any attendee can add any style item to the agenda, but Joey describes the process and selection of what typically gets brought to Word Nerds. Sometimes it's themes, like security: writers want to make sure they are not just writing about security, but that they are talking about it as a company in a consistent way, and in a way that works with and for the Legal department. The other portion comprises things that seem “maybe very miniscule or silly,” like whether *datasheet* and *whitepaper* should each just be one word (they are), and whether to hyphenate words that begin with *multi*. But things like SELinux (Security-Enhanced Linux), when not already represented in the style guide, can be necessary to discuss for consistency as well. As Joey explains, “Because authority on how we say something does not rest with one person, it’s common to hear ‘Let’s bring that to word nerds because I think I’m curious how other people have been using it.’” Thus, curiosity leads to collaboration within the community, which leads to consistency within the content. And as this section shows, the primacy of building and maintaining relationships—from mentoring to peer review to Word Nerds—enables writers to learn from each other not just in the beginning of their careers at Red Hat, but in an ongoing process throughout.

### **Low-stakes, hands-on, and the content editing board**

If interpersonal relationships are the foundation of a broader social structure like a community, then it is helpful to consider how the Content team functions as a community, and which type of community we might identify it as. It is like a discourse community in some respects, which I will show below. Bizzell (1992) defines this as “a group of people who share certain language-using practices,” which use style and world view to bond its members together. “Stylistic conventions regulate social interactions both within the group and in its dealings with outsiders,” she argues, while “canonical knowledge regulates the world views of group members,

how they interpret experience” (p. 222). For Red Hat writers, asking questions about the style guide is a start, and applying it is the next step.

Talking with my interview participants leads me to conclude that that curiosity sustains new writers as they learn to write for Red Hat, one assignment at a time. Their responses suggest that the range of content they might work on is dizzying, but examples include writing drafts of social media posts, offering feedback to revisions of pages on redhat.com, and editing where it is needed. The editing process for “collateral,” in particular, is really useful for getting a feel for what's authentic to Red Hat while at the same time getting an invaluable education in how Red Hat’s many technologies work. Many writers told me they got their start on the team by editing collateral (e.g., whitepapers, datasheets, brochures, and case studies) that stakeholders on other internal teams send to the Content team for improvement. It is a starting point, but far from rudimentary. And several interviewees lamented to me that the less they work on editing collateral the less familiar they are with Red Hat products and how the company talks about them. The team has grown and the process has evolved, but editing collateral remains one of the best ways to introduce new writers to the depth of the Red Hat voice and the breadth of the Red Hat software portfolio.

Kelly, for example says they learned to write “in the Red Hat style by relying on what I know, which is periods, commas, crossing Ts, dotting Is, and doing copy editing for our resources” as part of the content editing team. Anderson, in turn, remembers “Working on the [content editing] board for my first couple of months was really useful for learning to write in the Red Hat voice because you saw so many things that were so far outside of the Red Hat voice and trying to bring them in line with it.” And Joey says “I would like to do more writing and individual work and be more of a specialist, but I think editing on that team has been a really

helpful way to understand our voice.” Editing collateral and being a part of the content editing board made the abstract idea of the Red Hat voice real for Dylan, who says “You can go through the training classes, but until you get edits back on your work it's not, I think, as concrete.” From these interview answers, the pattern seems to indicate that learning how to apply the Red Hat style guide is a common and effective way for new hires to become part of the Red Hat Content team discourse community. That, in turn, brings some consistency in how that group answers questions about the Red Hat voice to outsiders.

Many interviewees discussed the role of trust in their jobs, especially its importance as a foundation for building and maintaining collaborative writing relationships. And the content editing team retrospective meeting has been one of the best and most useful examples of intra-team collaboration that I encountered during these interviews. About once a month, all of the writers and editors on that sub-team get together to look at the same piece of collateral (e.g., a datasheet, brochure, or whitepaper). Each team member edits the document in full before the meeting, and they put the document on screen to go through, line by line, and compare notes on what each person did differently and what edits they had in common. Then, importantly, they discuss their thought process behind each edit or omission. Personal style plays a role in the decisions (some might prefer commas over em dashes, say) and someone might not be aware of the latest messaging update for how Red Hat describes something like open hybrid cloud. The purpose of the retrospective isn't to see who can edit it “the best,” or to stamp out individualism and become carbon copies of each other. Instead, it's to recognize where differences exist in editing style, discover why they exist, and collaboratively find a solution that best serves the Red Hat corporate voice, which in turn serves internal requesters and—most importantly—the eventual audience reading it. Evan says that this type of exercise could not happen in a team that

didn't trust each other, or a team where vulnerability in sharing your writing process is looked down upon. "It's a very safe place," Evan says, as they explain how the team invited an intern from another team who was applying for a position on the Content team to join one of the retrospective editing sessions to get a sense of how the team works collaboratively. "They came, and it told us a lot. We could tell they had done a lot of work before they came. Then, they asked great questions and so they were thrilled that we do that because I think it helped them learn, too." In this way, new team members learn the practices and style of the community they are joining.

In this section, I explored how new Content team members made use of available resources to learn to write in the Red Hat voice and become part of a community, and how that contributes to the collaborative writing practices that help maintain consistency in how that voice is used in marketing. But consistency is just one of several aspects people might use to say whether something "sounds" like Red Hat or not. In the next section, I will explore several of these, and the perception of my interviewees.

## **Evaluating the Red Hat voice**

### **The challenges of writing in a voice that isn't your own**

New writers have an easier time learning the Red Hat voice than they do the Red Hat portfolio. "The difficult thing I always found with Red Hat and technology is exactly the technology. Getting your head around how it works so you don't sound like a dummy" says Brooks. Joey echoes that challenge: "I honestly think I struggle more with this subject matter, expertise or lack thereof than I do with writing in our voice and tone. I think that, as a generalist, I find it harder to get to know our products and technologies." And in considering the challenges

each writer encounters when first adjusting to the Red Hat voice, it's also important to include change over time. "I can't tell you how many things that I probably knew a year ago but don't know right now. And that I think it's mostly about our portfolio and our growth as a company and things edging out for your attention," says Joey.

But at least two interviewees had come to the Content team from other internal teams at Red Hat where they knew far more about the portfolio than they did the corporate voice. That is directly related to the challenge of defining a job role for yourself on a team full of what other Red Hatters would call writers. "The things that I had to learn, the things that were the hardest were of course style guides and stuff like that. That was really hard to internalize I think, especially for someone who's not a, doesn't see themselves as a writer," says Sage.

But not having a writer's background also seems to open a Content team member up to more possibilities and more ways to understand the technology itself, which is frequently cited as a bigger challenge than learning to write in the voice. Sage works on the digital content strategy team, which creates and maintains content for redhat.com, and is considered one of the more technical experts. Sage described their experience learning how to explain a particularly popular technology in the industry at the moment—Kubernetes—by including commonly used terms, then developing a glossary with the people who know the technology the best:

"I worked with a couple of engineers that actively work on Kubernetes to take the definitions of those words that I found online and write them in a much more approachable way. I'd ask them, 'Wait, isn't it really just *this*?' and they'd say, 'Yeah, you can say that.'" And that's one of the things we decided to add in to see if it was successful. If people start approaching their CIOs saying 'hey, this Kubernetes stuff is really blowing up. We should think about it.' then the CIOs who have been in technology a while but are more separated from the day-to-day stuff might search online for 'What is Kubernetes?', and they'll find my page and they get to have a glossary.

Sage's experience with writing a page about a highly complex technology in more accessible terms demonstrates the straightforward, conversational aspect of the Red Hat voice that the team aspires to.

Adjusting to the P's and Q's of the Red Hat corporate style guide is a process all new writers go through, but there's more at stake with the brand voice than "just stringing words together to get your very basic point across," as Angel puts it. Angel, who has been with the team for a relatively short amount of time (around a year), continues: "We've got a lot more to think about in terms of style and audience and how we're presenting ourselves to the world. We are different. We want to make sure people understand the way in which we interact with people is not the same as a lot of different companies are." Here, we see the importance of diverse perspectives. Someone at Red Hat for seven years might be so used to the Red Hat voice that they assume Red Hat still sounds very different from the rest of the tech industry. But that may not be as true as it used to be. Time spent on the Content team influences a lot, whether as a new writer or one who's been at the company for nearly two decades, as is the case with Max. "I don't know that I know anymore where Red Hat's voice begins and mine ends, to be honest." Here, we see a writer who helped shape the Red Hat voice in its early days, and is now so used to it that it becomes not a challenge to adapt to it, but to adapt away from it. "I can't imagine what it would be like to go to another company and try and ... especially if the company was one that made us write or whose voice tone and style was replete with the bullshittery of most."

Angel continues on this theme of whether Red Hat stands out in the industry. "It's not to say that we're also unique. I mean, we are fairly different than most companies out there, but it's also we're not the only ones who are taking this kind of approach to audience building." And trying to sound unique and conversational can have other, unforeseen challenges, like Keegan

points out in the following exchange.

**KEEGAN:** I speak in plain language. I don't try to obfuscate my meaning, I don't try to trick you. There's no Fog of War here to distract you with a bunch of flashy marketing bullshit. Sometimes I worry it might put us at a disadvantage, because our audience is so used to assuming that people are lying to them, that they hear the claim, and then take two mental steps down. It's less than that.

**INTERVIEWER (MATT):** But how do you stand out as the person who's not lying? Because everyone else will say they're not lying.

**KEEGAN:** Right. You don't lie, and people over time believe you, because they have... when they looked at it, they've seen you're not lying. They go to validate the claim, and they're like, "No shit. They were for real, not lying."

**INTERVIEWER:** So you gain the benefit of trust through repeated experience and quality.

**KEEGAN:** Yeah. But where it gets weak is that I can't always prove that I'm an insider, because I have to be stiff or formal....Now one way that I think we could get around it, but it is a current weakness, is that with no bylines, with us all speaking in the corporate voice, we're... I mean, I think there's plenty of room for the corporate voice to be formal. [Red Hat technology evangelist] can do this, because he has his brand. I can't, because one, nobody gives a shit who I am, and rightly so. But two, I have to, because I can't speak in my voice, I just speak in the corporate voice, and I can't adopt a more casual tone, which would allow me to win the trust of the audience.

Keegan's remarks are a reminder of how Red Hat's marketing rhetoric depends on the communities of practice in which it is produced and circulates. They also illustrate the challenge

of determining what sounds authentic to an audience depends on *which* audience, and how constructed notions of those audiences can vary within the Red Hat writers community of practice. And to explore what it means to be authentic to the Red Hat voice, as well as how collaboration within and across communities of practice influences that voice, I turn first to the perception of how well the team lives up to the 5Cs of the brand guidelines.

### **The 5Cs of the brand voice guidelines**

Clear. Concise. Compelling. Consistent. Credible. Taken from the Red Hat brand guidelines, these are the aspirational qualities of the Red Hat voice. In an environment without traditional, top-down hierarchies controlling how something should be written, where employees embrace an idealistic version of meritocracy, where subjectivity can flourish, where messaging is not controlled through a single chokepoint, and where everyone is encouraged to give their input—even on matters outside their immediate expertise—these 5Cs are what the Content team defaults to as a North Star. They also serve as a convenient, measurable data point to evaluate what can otherwise be a highly subjective matter of study. Simply stated: If these are the goal, how does the Red Hat voice measure up? I included questions about these five aspects of the Red Hat voice in each of the other survey instruments I used for this dissertation project, for both Red Hatters outside of the Content team and for Red Hat Summit attendees. Because I did not include a quantitative survey question about the 5Cs in my Content team interviews, I do not have a clean 1:1:1 comparison with the other case studies in Chapter 3 and Chapter 4. However, I did ask my interviewees a) is the Red Hat voice effective, and b) which of those 5Cs would they change, and why? The answers I collected were roughly translatable into ranking each aspect and how successfully the team thinks Red Hat is living up to them. And while broad-scale quantitative analysis is outside the scope of this chapter, I present rich qualitative data firsthand

perspectives on what that voice does and does not do well.

Table 1 shows occurrences when participants called out an aspect explicitly during our interviews, either as a success that the corporate voice does well, a mixed success where the corporate voice shows elements of success but with persistent challenges, and where the corporate voice struggles. Not all interviews were parallel, and there were several participants who did not comment explicitly or implicitly on all five aspects (hence the lack of a total).

*Table 2.1: How members of the Content team rate aspects of the brand voice guidelines*

<b>Aspect</b>	<b>It's a challenge</b>	<b>It's mixed</b>	<b>It's successful</b>
CLEAR	2	2	<b>11</b>
CONCISE	1	2	6
COMPELLING	<b>4</b>	<b>12</b>	2
CONSISTENT	2	5	6
CREDIBLE	1	5	<b>9</b>

In general, the team's highest marks went to Clear and Credible. Given the team's strong aversion of and sensitivity to needless jargon, the emphasis on Clear writing makes sense to me and apparently to the writers I interviewed. Lanham (2006) is helpful here for me to think about the notion of clarity and its relationship to rhetorical principles:

Clean information is unnatural and unuseful. Information always comes charged with emotion of some kind, full of purpose. That is why we have acquired it. The only way to make it useful is to filter it. Filtering thus becomes central. And here is where style comes in. We keep striving for 'pure information,' but the more information we have, the more we need filters, and one of the most powerful filters we have is the filtration of style. So another paradox: the utopia of perfect information brings with it the return of stylistic filtration, of, as it has traditionally been called in Western culture, rhetoric." (p. 19)

What is clear to a systems administrator with twenty years of IT experience may be hard to read for an intern at the same position. The importance of considering both projection of the voice and perception of its efficacy can be thought of as another aspect of collaborative writing, not between two writers but between the writer and the audience, each bringing different ideas of what counts for Clear and each forming an opinion of how much of Red Hat's authenticity stems from clarity.

And the high score for Credible also makes sense given that writers' responses in this study demonstrate that they are consistently cognizant of the need to back up claims with evidence or else risk the reputation of themselves as writers, the Content team as representatives of the company, and Red Hat's reputation as a trusted guide in IT. Cameron, a content strategist, explained the motivation:

One thing we all have in common is, we all understand that we cannot make claims that can't be backed up, and we have to be rigorous about how we work with subject matter experts to make sure that we have accurate content. Like, everybody is terrified. I think it's so funny, all of the content strategists I've talked to about writing topic and article pages, are terrified of saying something wrong, which is great. I think it's funny, because it's not like there's a byline. Like, there's no name. Nobody knows who wrote this. But people treat it, all of the content strategists I think, collectively treat each article they're writing as if like, it's their name on it, and they would be mortified if they said something wrong.

Credibility, though, extends beyond saying the right thing or quoting the source with accuracy. It also encompasses the need to consider what the reader is bringing to the conversation in the first place. "It's not just about, if what you're saying is true," says Jian. "It's if what you're saying contradicts what someone believes. Even if it's true, you will not be credible to them....You have to know the audience." This, for me, helps reiterate the overlap between

marketing and rhetoric, and the useful applications of using one to inform the other. In what other ways does credibility come to bear for the Content team? For Jordan, credibility is the foundation upon which more than just the Red Hat voice is built; it's what defines the only billion-dollar open source software company in the market.

Our entire philosophy stems from you pay us money not because you have to and we're the only source of these products, but because we can make you the most successful with them....And our corporate voice stems from that. It's like if you're not successful, you're going to stop paying us and we want you to keep paying us. So we need to make sure that you're successful.

Meanwhile, the issue of Consistency can be thought of in multiple frameworks. On an individual level, a writer might not be consistent in the way they use the style guide from project to project, or might forget the rules about a specific entry if it's been a long time since they had to know it, or the rules might have been updated and changed to reflect the outcome of a debate in Word Nerds or a change to the AP Style Guide, on which the Red Hat corporate style guide is based. Writers at Red Hat—indeed, probably writers everywhere—grow and evolve and change over time as well, so the way I wrote a booth headline for the Red Hat Public Sector marketing team in 2016 might not be anything like the way I would write one for them now. Red Hat's portfolio of products is vaster and deeper than it has ever been, and if your job doesn't require you to work closely on the messaging for each technology, it can be exceedingly difficult to feel outdated about your expertise, as Joey laments, "I can't tell you how many things that I probably knew a year ago but don't know right now. And that I think it's mostly about our portfolio and our growth as a company and things edging out for your attention."

Consistency can be a challenge from person to person as well. A content strategist with six years of experience might describe hybrid cloud infrastructure differently than one with six

months, and both might describe it differently than a copywriter or a writer and editor. And if a writer keeps focused on their own work and doesn't often see what other writers on the team are doing, they may end up drifting further away from the average Content team contributor.

Anderson mentions this in his interview "If other people ask me to look at stuff they're working on, I read it. But I don't see a lot. I don't know if I feel qualified to answer this question, because I don't know if I see enough."

DJ expresses their concern about trying to adhere to the tenets and guidelines of the corporate voice while working on partner marketing content, especially when outside agencies are involved across multiple locales.

People in other regions, they hire agencies and it's just the wild wild west. I can only speak for Partner but that's exactly how I described it when I first got hired, it was like the wild wild west. People just did whatever, I would find pages and I'm just like, who wrote this? They don't work here anymore." Why is this still here? It's just every day, I feel like, for the first couple of months, I just looked at things and was like, how is this allowed to be? Because it just doesn't match up and I think that, again, going back to that whole personnel thing, the coverage was not consistent. There was a disconnect there where the Red Hat voice kind of fell by the wayside and people just kind of wrote whatever they wanted to write on Partner Portal even if it did not make sense. Because there's no one to say, "hey don't." No one there to say anything.

And yet despite these challenges, Kali points out that the team's award-winning approach to content marketing stems in large part from a consistent approach.

That's what we got awarded for. We got an award, we got a write up in, by Content Marketing Institute as the model for content teams in 2020. Because we touch so many parts of the business, the other way of thinking about it, is you break this team up and, well, some of them are over here, some of them are over there, some are there, some are

there, some are there. The point there is, we don't write everything, we don't touch... But, we touch enough things that we create consistency where it matters. And, we show the example of consistency.

There was a general consensus that the team is Clear and Credible, and agreement that the corporate voice is mostly Concise and Consistent. What surprised me is how much the issue of Compelling writing came up across the interviews. Twelve people raised it as a mixed bag, and it, more than any other C, was called out as a challenge for the team. What could account for this? "It's hard because it's entirely audience-driven" in a way the others aren't, says Max. Making content more compelling is a struggle for the team, says Chris, because "to me, compelling...well, my definition is 'To actually compel somebody to do a thing.' And if they're not doing the thing, we're not doing our job, right?" A paragraph can be the most fact-filled, concise, and clear writing a person will ever come across, but if it's not compelling, it might not succeed, because "how's it going to be helpful if nobody reads it?" says Chris. Kali attributes the challenge of Compelling content partly because of the sheer volume of work the team handles, and partly because when requests come in they don't include enough helpful information about the context or audience. But a bigger part of it, says Kali, is that:

with the global audience, for a lot of our work, I think we've lost some of the voice that we had seven years ago. I think we've built some of it, we've evolved it more, and I think that's good. Because, I don't mind being grounded in the truth, and at least I know I trust what our work is going to say. They're not going to lie to me, they're not going to make claims that don't make sense....I think it might be interesting, but it may not be the most unique or differentiating.

Growth, credibility, and maturity for the team seems to come with a minor cost to the tone.

That strikes a familiar chord with Sage, who says their team of content strategists gets a

lot of pushback about the team’s writing “not being flashy enough.” Sage’s perspective of what counts as compelling is a little different—it’s based on search results. “My team, because of the work we do, doesn’t focus on compelling as much because we’re trying to be educational. But compelling, here, is people telling us what’s compelling to them because we’re looking at search results. We’re looking at search volume around things and we’re writing the same thing,” they say. This complicates the audience-only approach to compelling by adding aspects like context and timing—what the audience searches for might not be the same terms Red Hat uses, and thus the team has gap. But the integrity of the Red Hat corporate voice must remain the same, and it does for Sage. Harkening back to the shibboleths of Shadowman at the beginning of this chapter, Sage invokes consistency as an integral marker of Red Hat’s voice and tone:

It's truthful and yeah, it might not be as flashy as other software vendors, but I think it's consistent. And I know what I'm getting from Red Hat. I think it's effective despite what I hear constantly because whenever I see an ad from Red Hat that I know didn't go through our team, I feel really grossed out about it. And whenever I see one that has clearly gone through our team, I'm like, I know exactly what that's going to do. That's really cool. I don't know, as someone who is really into technology, whenever I see these ads from say an HP or something and it's a guy skiing down a mountain and it's talking about the cloud, and I go “I don't know what the fuck any of this is. I don't know what it does. I don't know why I should care.” Never. But if I see a Red Hat ad, I know what it is for the most part. I see things like “build your autonomous hybrid cloud” or whatever like that. Yeah, those are some buzzwords and stuff. But I know that you're helping me build a thing that everyone's talking about, right?

But do those ads resonate? The fundamental cornerstone of rhetoric is to understand your audience, and I think that accounts for a lot of the ambivalence about what counts as compelling. Writers have access to *some* data about how their content performs, in the form of specific

engagement tools or focus groups or search volume. And writers base their rhetorical decisions on defined personas that Red Hat researches. But what's missing from each writer's understanding of the audience is direct, unfettered access to the readers who will see it. What can we learn about the Red Hat voice from the questions the Content team would ask their readers if given the chance?

### **What would you ask your audience?**

Writers on the Content team attempt to place their audience front and center among their goals. Write with a particular audience in mind, and cater the message to the problems they are trying to solve. Whether that audience is persuaded that Red Hat can solve its problems successfully is, to a large extent, not up to the writer. A developer at a new lifestyle startup likely cares about the freedom to code an app in the language they choose, while a chief technology officer (CTO) at a major healthcare company likely cares less about which languages their developers can code in and cares a whole lot more about security and compliance. So how do writers on the Content team know who their audiences are and what they care about? By relying on as much available data as they possibly can. This comes from a host of sources, such as SEO reports on topic-specific searches, website analytics tools that show which areas of a page a reader spends the most time on and which links get the most clicks, industry surveys, persona research, work in the upstream open source communities, focus groups, user testing, and a great deal more. But statistics, as the old Twain saying goes, can be misleading or incomplete—this means that the Content team might not always have enough data to connect with their target audience with the precise language, metaphors, thought leadership, and messaging they want to. So, if interviewees could do away with every layer that sits between them and their rhetorical audience, what would they ask them? Their answers here reveal where gaps in understanding

among the team exist. Broadly, the team's questions centered around their audience's motivations for finding what they are reading, the environment in which they are reading, the quality of the writing itself, and what the audience would do after they read it.

Oftentimes the problem with connecting to an audience isn't having enough data or having the wrong data; it can stem from not having access to the data you need. To know your audience is to know what they need, but that's not always readily available or readily apparent. Keegan, a content strategist, feels like they are guessing, at best, with the data they have on hand.

I want to ask them, "How do I find out what you need? Like, how do I meet your needs?" I used to be able to look at searches, internal searches or tickets. Like, I can get some of that. I'd ask [a Red Hat SEO expert] about it. But how do I meet their needs? Because I am really starting to believe that marketing should be the first line of support. And that if we do that, people will know we're different and better, that people are really cynical about being sold to. I just want to know, what do you need? How do I help?

Even identifying the right audience in the first place can be a challenge if you don't have the time or job responsibilities to immerse yourself in persona research. Anderson runs into this problem when writing ads. "I have a very rough sense of the difference between writing to an IT decision maker and writing to a developer. If you are reading an ad from an IT company, why? What are you hoping that ad might have for you?" Frustration with not having a guarantee that your message will reach the audience you think it should can be a natural part of writing for the web. That frustration can get exacerbated when your content designed to motivate buyers is credible, compelling, and clear but you have little to no way of knowing whether decision makers with buying power are counted among your pageviews. "What is your job?", content strategist Cameron says they would ask. "Because I have a sneaking suspicion, or maybe a fear that a majority of the traffic to our pages are not people who would ever be even close to being a

customer.” This lack of feedback also resonates with Joey, a writer and editor on the content editing board who handles a lot of quickturn requests without a lot of context. “I think because I’m not connected to why we are creating the material and who is creating it, that sometimes I’m just like, ‘Is anyone out there?’”

The void is a cold and empty place in which to shout about open source technology. It’s tempting, if you think no one is paying close attention, to add some personal flair and attitude to content that might be otherwise straightforward. Who wants dry, stuffy, and boring when you can have clear and conversational? It’s a balance Terry struggles with, because it’s not always clear from the research they have to go on whether their idea of a persona is as fully developed or accurate as they are led to believe it is. On making choices about where to be fun and lighthearted, and how that might be a turnoff for our audience, Terry says:

I do think that's part of one of the struggles I had starting is that we seemed to want to speak in this really casual and lighthearted and funny tone in a lot of ways. Whereas, some of the user research was telling us that that's a turnoff for a lot of developers and programmers who come here. And they're just like, ‘Give me the specs. Tell me how much it costs. I'll bring it back to my boss and maybe we can do this shit.’ You know what I mean? So that was tough for me. Because I was working with another writer on a few things and he was pushing back a little bit on what I was writing. And he was like, “No, no. We can be a little more fun here.” And so I think there's a balance there to where better understanding from user research like, "Is that how we want to project ourselves to people or is that how people are hoping we speak to them?"

If audience is the shared foundation of marketing and rhetoric, as I claimed in Chapter 1, then it follows that the job of marketing writers is made more difficult the less they know about who they are writing for. As Terry’s comment shows, it might be natural for an audience as broadly defined as “developers” to contain multitudes, but their task of persuading the reader to

purchase products from Red Hat or to think of Red Hat as a trusted guide in enterprise IT can be reduced to guesswork without the knowledge infrastructure in place (or without access to it) to suss out those differences, and with added subjectivity about what's "authentic" to the Red Hat voice. I raised that issue of defining authenticity in Chapter 1, arguing that it changes based on an individual's relationship with Red Hat. The interviews with the team here seem to illustrate what Deibert (2017) observes, as a Fortune 500 brand advisor and member of the Forbes Communication Council, arguing that authentic communication comes back to "an underlying foundation of mutual respect, honesty, and trust between them and the establishments they associate with." In other words, the importance of building a relationship between writer and reader cannot be overstated, and I will return to this key point later in this chapter when I examine how conflicts are resolved with internal stakeholders.

### **Quality of the writing and uniqueness in the industry**

One of the claims that the Red Hat brand voice guidelines makes about the way Red Hat communicates is that it is unique within the tech industry, and the company doesn't sound like every other company out there using jargon to make themselves sound more important. It's a theme Anderson comes back to here.

I would want to know if, I mean this is obvious, but do you sense that Red Hat sounds different from other companies? Because I don't know if we do. I think that we do but in the end it's not my... it doesn't matter whether I think that we do. I also feel like voice and tone, are they like refereeing and you only notice them when they're bad? Because if someone's voice is off-putting, you're less likely to consider the content of what they're saying.

This question is one that I have been asking myself and fellow Red Hatters for more than

two years as part of this research. The hesitation here is telling, I think: As they talk through their question, they realize they have accepted the truth that we sound different from other companies as a given, but then questions first how accurate that is and second how they would go about getting answers for it. And their end thought speaks directly to Lanham's at/through oscillation of style. It seems natural that those who use the Red Hat voice and are trained by other Content team members to write in it would adopt the same beliefs about the uniqueness within tech, because that is offered as a primary reason for the team to a) exist and b) strive for consistency across the board. That same concern that Red Hat might strike the wrong tone from time to time is shared by Anderson's teammate, Angel:

I would ask them honestly what they think about the writing, and not just of the social itself, but of the surrounding content because a lot of that is me directly writing that. Just because I always have the fear that when I'm writing it, it's like that Steve Buscemi meme, "How you doing, fellow kids?" I want to make sure that's not what we're doing, that's not how we sound. Because there is that fine line of being playful and approachable, but also we don't want to be that image.

Other questions wanted feedback on the quality of the writing itself and centered largely around clarity. Clear writing gets out of its own way and lends itself to comprehension. "Was it explained in a way that you could read it and gain knowledge from it, or did you have to go back and, 'Oh wait, what is this talking about here? Let me go back up top.'" Or "Do you remember 'stumbling' over anything in this content? Did you get halfway through a sentence and have to go back and question if you read that right?" And "Is this clear? Do you understand the message that we're trying to get across? Like, if you're seeing the name of the page or a headline, does what follows pay off what you're expecting to read? Is it telling a story?" And if we accept that comprehension cannot come without clarity, then Kelly's question would itself turn into a useful

audience activity in and of itself. “I'd say, ‘Explain ...’ Because I work on primarily educational content that's free to the public that anybody can have access to. I would ask them, ‘First of all, do you think you understand what you just read?’ It's a simple yes or no question. If no, what questions do you have left? If yes, explain it back to me in your own words.”

Several Content team members wanted to ask their audience about specific qualities of the Red Hat voice, which can be aligned to the 5Cs of the brand voice guidelines. Several interviewees had similar questions for their audience, all centered around the motivation to be helpful. Did it help you? Did you find what you were looking for? How did that make you feel? What questions did you have that weren't answered in this piece? And these speak to the purpose of the writing, which could vary significantly from role to role or project to project. DJ captured it best:

Was this valuable to you and what is your next action going to be after you do this? I have wishes. My wish is, whatever conversion point I'm trying to drive them to, that's my wish. Whether that is sending in a form, or emailing us, reaching out to one of the programs, registering for a Partner Portal, whatever that is. I have wishes about what I want them to do, but what I really want to know is, what are they going to do next after they read this? Because that would be really helpful to me, just to know an honest answer.

These questions are specific to the qualities of the Red Hat voice and, I think, all the questions my interviewees wish to ask their audience speak to the most challenging aspect of the 5C guidelines: compelling. Of the five, it was ranked the lowest among Content team members, and it did not perform as well as the other Cs in the two other case studies I will introduce in Chapters 4 and 5. Many factors could account for this, but perhaps the biggest explanation is who gets to decide whether something is compelling or not. Writers across the team can

generally define what makes for marketing messages that are clear, concise, consistent, and credible, but whether something is compelling or not is largely up to the audience reading it. They choose what to do with this new information, and whether it improves their opinion of Red Hat as a trusted guide or whether it does not. Jian centers the importance of audience this way: “It always has to be about your audience, and Red Hat is just so much talking about Red Hat, and what we do, and what we build, and who we are, and what we care about, and because we're so passionate about it sometimes I feel like we lose sight of the audience and what they care about.”

For Finley, a content strategist who works on redhat.com and specializes in how Red Hat talks about itself and its contributions to/relationship to open source, that question of what to do next is even harder to evaluate. For content strategists who write pages about specific products or bundled products called solutions, their pages have CTAs that are focused on getting the reader to see customers who successfully implemented the product, or read more about its benefits, or to try the product. The path from visiting the page to where the visitor goes next is clear, and thanks to digital marketing technologies, those visitors can be placed in a marketing nurture program in the hopes of getting them to make a purchase. Finley’s job presents a different challenge, as visitors rarely read the About Red Hat page and then jump directly to purchasing a subscription for Red Hat software. Finley wants to ask a straightforward question to that point, “Does reading about open source or our culture or our company lead you to want to look at our products?” Finley elaborates further:

Are you able to find more information if you're looking for it? If this didn't answer all of your questions, do I layout the places where you can find the answers? Because that is a huge part of it too. We're always cross-linking. We're also always highlighting resources, CTAs, where do we want to send people? Hopefully, we're sending people to the places where they should go next and where they can keep learning because that's a lot of my

work. That is a challenge, too. We're trying to create a funnel of sorts for open source pages. We've got product funnels. It's harder to prove dollar values or amounts to pages that are about education and awareness. So, we're trying to create more conversation points or connect them so that they can eventually go to products. That is a challenge for me, too.

One of the tricky elements of writing compelling marketing content is that internal stakeholders want to see proof that what's being written is helping sell more software. That's easier to show from the activity on a product page and the accompanying downloads of a gated datasheet or tech detail that requires the reader to give Red Hat their personal contact information, then tracking that visitor with cookies and planted pixels. It's more difficult to demonstrate that a reader *felt* better about Red Hat after reading something and therefore would be more likely in the future to buy software because of it. But the Content team still strives to produce compelling writing across the motivation spectrum, knowing that they have earned the respect and trust of decision makers in corporate marketing and in other echelons of the company.

Three interviewees in particular focused their hypothetical questions on the feeling their writing would instill in their readers. Mo, for instance, touched on the importance of establishing parity between author and reader: "Do you get a sense of being in an open conversation or do you feel talked at?" Similarly, Taylor brought the focus to the conversational tone, with an emphasis on continuation: "Did it feel that there's a personality to the words that you just read? And if so, would you want to have a conversation with that person, or not so much?" Finally, Max wanted to inquire not just about the conversational aspect of the Red Hat voice, but whether it's still a defining quality of the brand: "Does this work? How are you feeling about us? Because that's the goal: what feeling are you walking away with? Are you walking away thinking, 'Well,

this is a company that you can believe, that you should listen to?’ Or do you walk away thinking, ‘Oh, it's another technology company.’”

So how does Red Hat keep from becoming just another technology company? By leaning into one of the defining tenets of open source: collaboration.

## **Working with others**

The focus of this chapter has been on the Content team, how they work, and how they craft and adapt the corporate voice and tone. I want to make it clear that these 50+ people are by no means the sole keepers of the voice; there are scores of other writers and hundreds of content contributors who all help shape Red Hat’s voice and tone. But the Content team has, since late 2012, been working on developing a better content model, based on audience-driven data, for all of Red Hat to use for communicating more effectively. Before the team was formed from a reorganization, Brooks recalls how they recognized kindred spirits on other teams within the Marketing department. “I started communicating more with Max and Chris, and one of the project managers at the time realized that we were double-editing collateral and started asking why, and then we started talking more. I think that's how me and Max started talking. And once I met Max, it didn't take long for me to realize they were amazing.” These three writers, from public relations, web writing, and the brand team, converged and said “We should do more together,” and the foundations of the Content team, as well as Word Nerds, were born.

“The team doesn't write everything at Red Hat—we never have,” said Kali, the team’s leader and Senior Director. “That is not the point. The point is to have a hub of people who can maybe create something that then other people build on.” I have partially addressed how that hub was built, and I will do so elsewhere in this chapter, but how do other people build on the work of the Content team, who are those people, and what does that collaboration look like? Interview

Question Four attempted to address this by asking team members “In what ways is your writing collaborative?”, which in itself presupposes that it is to begin with. It might be better to have asked each person if their writing is collaborative (or if they would consider what they do to be “writing” at all), and if so, how, and if so, with whom, and if so, when in the process of working on their content is it the most collaborative.

### **Do writers get to choose how collaborative their work is?**

As with many of the questions asked across a diverse team, the degree to which each writer gets to choose how collaborative they want their work to be was mixed. Joey, a writer and editor on the content editing kanban board, said “I feel like I have very little autonomy in my work going out to market, that for good or for better or for worse.” Jamie, on a different team, echoes that sentiment but frames it more directly in the language of negotiation and agreement. “In our structure, there usually isn't a decider. There's usually a collaborative process where you reach a consensus, and it's up to everybody to listen, and hear how strongly people feel about the various points they're trying to make and reach a compromise. It's nobody's favorite way to write anything. But as a writer for money, it's one of the skills I have to have.”

How is collaboration defined? For Jamie, as a newer team member, collaboration extends past two people working on the same project at the same time. “Everything I have worked on here in my short five months has been collaborative. There's always been a baseline that I've started from that somebody else had written, or notes, or a messaging guide that somebody else had worked on, and it's my job to make it public-facing.” Jamie’s definition here expanded my consideration of collaboration, which I had only thought of as a real-time activity, or as a project with the same people over a given time.

But when is collaboration important for Red Hat and for the Red Hat voice, and when is

it less important? When the content isn't just talking about a product or a technology topic, but instead represents Red Hat's ethos at a much higher level, there are more people involved in the specific wording, layout, and design. Finley explains:

If you talk to or if you have talked to people on the Products team, they are writing in Drupal or SEO Studio. They're writing things and publishing them with no approval there. Maybe somebody has edited it like a peer, but no one is saying, "Yes, that is ready to go." Their life is different. Mine, because a lot of what I'm working on is connected obviously to the company, to the brand, talking about larger concepts like open source and who we are and what we do and what we are aiming to do with our technology in the future, they need eyes on them or I need somebody else to say, "Yes, this is what we want to say", or "No, this is wildly off base. We need to rein this in."

Finley also works on the "About Red Hat" page of the website, and says they have come to understand why so many people are so intent on fighting for their piece of some of the highest level messaging Red Hat puts on its site. If everyone's going to see this, they'll want to make sure that their thing—whatever it is—is in there.

### **Power, trust, and authority**

As I learned from my own experiences collaborating at Red Hat, you start out on the team and try to learn as much as you can. You are learning about the technologies, you are learning about IT, you are learning about open source as a philosophy, you are learning about Red Hat's role in those three, you are learning how to write in the Red Hat corporate voice, and you are learning about the institutional history and lore of the Content team so you know not just how to say something but why. If you are comfortable enough to say it, your comments on documents and in chat and in person start out as "I don't know what this means." Maybe this is your first time learning about middleware or microservices or multicloud or any one of 10,000 IT

terms, and you literally don't know what the thing is or understand it. But over time, with practice and experience and guidance, you add "I don't know what this means" as a comment in a Google Doc because the phrase you've highlighted doesn't make sense to explain the thing the right way, or it's not clear what the author is even trying to say. Experience begets confidence. Finley, for example, doesn't recall the specific date they felt that change, but they remember the feeling. "I think I realized it when I felt like I could say what I wanted in meetings and I didn't really care about the repercussions. Because I was fighting for what I knew was right and should be happening." Anderson echoed that sentiment, explaining "And I feel like I probably have enough credibility now that nobody's going to fire me for putting a bad idea out there."

You become more comfortable in your role as proxy for the intended audience—you want what's being written to accurately and authentically represent the Red Hat voice, and you respect the audience enough to not waste their time with jargon, long winded descriptions, or overhyped claims. But getting comfortable in that role means engaging with internal stakeholders who have their own agenda and strong opinions for not just what Red Hat should be saying but how it should be said. So, what happens when the Content team runs into conflict over the corporate voice and tone? How does the Content team earn trust, authority, and expertise in its relationships within Red Hat?

I asked participants to think of a time when they disagreed with an internal stakeholder about tone or phrasing that went several rounds of back and forth, and how that conflict got resolved. The specific examples they gave speak to a larger, broader question of how the Content team created an ethos of messaging expertise in an environment where everyone has something to say.

From 2012 to late 2014, edits were emailed back and forth between Content team

members and internal stakeholders as attachments with tracked changes in a LibreOffice document (an open source alternative to Microsoft Office). The process had its problems: sometimes hours of work would be lost if the program crashed, irregular version control meant a reviewer wasn't always looking at the most recent update, and a group of people couldn't edit the same document at the same time. The team—and Red Hat more broadly—moved to Google's G Suite platform for the enterprise, which includes Docs, Sheets, and Slides, among others. This meant collaboration could happen in real time, though that wasn't (and isn't) always necessarily great. But whether by Google Doc or LibreOffice Writer, when two people have conflicting visions for how something should be said, they can enter into unhelpful, repetitive cycles of editing that don't bring them closer to a resolution and don't make it easier to represent the Red Hat voice.

Some people get paired with internal stakeholders who appreciate what the Content team adds to the marketing process, and they are eager to see how they can work together in a partnership to make the messaging resonate successfully. Other internal stakeholders have a harder time seeing the value the team brings to the table, and to win them over is a constant struggle. Maybe past interactions didn't go as well as they could've, or maybe a clash of personalities was in play or a power struggle, or institutional pressure from someone's manager, or any of dozens of reasons conflict arises in large bureaucracies. Terry, a content strategist who has been at Red Hat for 2-3 years, has seen their share of disagreements and has learned to work through them productively.

I sort of made my own policy. Like if I push back on the way something is worded and I explain why and then someone is like, "But I really like it this way," then I'll set up a little meeting or just a call or something and say, "Here's some of the things I'm seeing and here's why we don't do it this way." And usually you can come to some sort of

understanding there. A lot of people just want to register their disagreement. And then once they've done that, they'll be like, "But you're the expert and we'll do it your way."

Not everyone has had the same outcome as Terry here, where the stakeholder defers to the Content team's expertise. Max, for instance, has been on the team since its inception 7 years ago and has been at Red Hat since the early 2000s. They worked on the Brand team before Content, and as a writer and coder before that. All of that tenure still doesn't earn them a free pass with stakeholders or the implied assumption that Max is the expert and should be the one to choose how something is said. Max recalls a specific example from a few years ago:

Yeah [stakeholder] was probably one of the most contentious clients I had early on, and I would go through and make edits, and it wasn't until we'd been through probably three or four whitepapers that I worked on for him that he finally got to the point where he stopped questioning every edit that I made. And the only reason he stopped questioning them was because I'd give him an answer that had meaning. It wasn't just, "Well, this is what the stylebook says." Or "Well, we make this choice because we feel like it because of our product naming strategy."

For others, though, the corporate style guide becomes the reference they can point stakeholders to as a way of making it more than just two people saying *I like this word better / no I like this one*.

Though the team has a diverse array of experiences with internal stakeholders, one recurring theme emerged above others in the interviews. A Content team member recognizes that passing edits back and forth in a system without an editor-in-chief to make a final call can be unproductive and harmful to the relationships they are trying to build across the company. Instead, they move to a different environment or format to discuss the changes directly with the stakeholder and bridge the divide with more synchronous interpersonal communication. Kali, the

team's leader and senior director, says they always encourage people, "If you're fighting with somebody in a document, just call them. Just say, 'Hey, let's grab 30 minutes and talk through this, ok?'" It's helpful to have that kind of example coming from the team's leadership.

Finley says their interactions also found a better resolution when they met stakeholders in person—and brought evidence to back up their claims. "We came to it with research. We have data to back up doing pages this way and not that. We brought data. We brought our experience. I feel like once they met us and saw us in person and heard about those experiences that we've had and that expertise, they were willing to let go." Relying on data and being willing to stake your position on it can be a risk, but it's one that's proven itself useful over the history of the Content team's evolution. Consistently bringing the style guide to bear on the conversation is one tool to use, and if the stakeholder doesn't agree with how the style guide says something should be written, inviting that stakeholder to contribute at the next Word Nerds meeting is another. And when that fails, being willing to put your credibility on the line can be the extra effort needed to push the project forward. Terry has had a lot of success with this approach, by saying "Let's try it my way first. We'll do a 90-day analytics post-mortem to see what the engagement has been with this part of the content. If it's not performing the way we hoped it would, we'll do it your way."

This can be a useful step in establishing more trust with a person you are going to be working with again in the future. But for team members who handle multiple kinds of content from multiple internal teams, and not always from the same ones, that lack of a consistent relationship makes it difficult to employ these same successful strategies. Jian knows this all too well. "Part of it's because I don't work with the same people all the time, and that frustrates me. You know, the whole point of a team is to develop these relationships so you understand each

other, and you can anticipate, and whatnot, right? When you're constantly working with new people, you don't know that yet.” With longstanding relationships comes higher levels of trust, so if you're asking a lot of questions and challenging a lot of things, your team knows it's because you want it to be the best that it can be, and not because you're trying to be difficult or make them feel dumb. But that relationship can be a tricky one to navigate when it's not just the Red Hat brand you have to take into account. Working on partner marketing content can be a specific challenge that other Content team writers aren't exposed to. Partners will sometimes push back on the Red Hat style because they want it to sound less like Red Hat and more like the average IT company. They want to blend in, not stand out. This is especially true outside of North America. DJ, who works on partner marketing content, says, “I think the one I hear the most is that's what they feel that their sales staff will respond to the most. That's the way that their internal conversations go, that's what they feel their end customer is going to respond to the most. That's what they feel is important to them.” DJ, more than other Content team members, might be subject to external considerations on their writing and editing decisions, and that can be a tough choice. Do you stand firm on all things in the style guide to uphold a consistent voice for Red Hat, no matter the context? Or do you compromise here and there to strategically preserve a working relationship in flux with a constellation of partners? For DJ, the choice is clear, and for good reason:

I don't try to find a midpoint. I'm a structure person, if Red Hat says I say this, I say this. I don't believe in deviating for the sake of someone else's brand. It's a really tough call because you have to think like, okay, this is a relationship, I don't want to damage that relationship any way or make it seem inconsistent or wonky. **But at the same time, Red Hat's brand is probably its most valuable asset.**

Of everyone who could cite a specific example, Dylan's experience stood out as the most

difficult. While editing an ebook and infographic, Dylan went back and forth with a stakeholder for 10 rounds of editing that took more than 8 months to complete. “I had the stakeholder on the phone with me while editing the piece. I mean, it was sessions of hours. Line by line we went through that piece. So, whenever that comes up, I’m like, ‘You guys have no idea. I did my best on it.’ Is it good? No. Is it better? Yes. And that’s the best place I could get it to.” This alludes back to the introduction to this chapter and those subtleties that writers look out for to tell whether something made it out into the world without working with the Content team. It’s a team with high standards for writing quality, and when they all see a piece that doesn’t live up to those standards they invariably wonder why. A writer might get defensive about their piece and provide the context behind it, as Dylan does here, as if to say “Look y’all, I know. This isn’t what I wanted it to be, but this is what I negotiated for and it’s better than what it could’ve been.” I have been in that position more times than I can count in my seven years with a headline or a tweet or a booth title, and there comes a point in every new hire’s career at Red Hat that they find themselves in the same.

## **Conclusion**

To grow from a half-dozen writers cobbled together during a reorganization of Red Hat marketing in 2012 to a diverse team of more than 50 experts in 2019 took trust. Trust between the team and internal stakeholders at Red Hat who need either Content help or approval to reach their own goals. Trust between the team and its leaders that investing in relationships and relying on data to make smarter decisions is the right strategy. Trust among the team to consistently uphold the style, strategy, and messaging rules and approaches they hash out together. Trust over time equals expertise, and trust over time creates credibility. In an organization where hierarchy alone doesn’t equal authority, the ethos of trusted guides that the team has toiled to forge over

time becomes more valuable than any directive from on high could. And, once established, that trust helps Content team members determine what is and is not authentic to the Red Hat voice.

This chapter helped to answer my three primary research questions that I laid out in Chapter 1. As my analysis in this chapter shows, Content team writers who participated in my interviews define and maintain the Red Hat voice collaboratively, without a single authoritative presence empowered to make decisions about how Red Hat should sound. Considerations of the audience are a fundamental part of that collaboration. In particular, my analysis revealed three broad strategies the team used to ensure the Red Hat voice is conceptualized and communicated authentically: 1) sharing resources and a willingness to try new approaches, 2) an appeal to *logos* through data-driven decision making, 3) building relationships among the team and with internal stakeholders. I showed how those relationships are the lifeblood of collaborative writing communities based in open source principles. In the next chapter, I will explore perceptions of the Red Hat voice from outside the Content team and across the company.

## **CHAPTER 3: What do other Red Hatters think of the corporate voice and tone?**

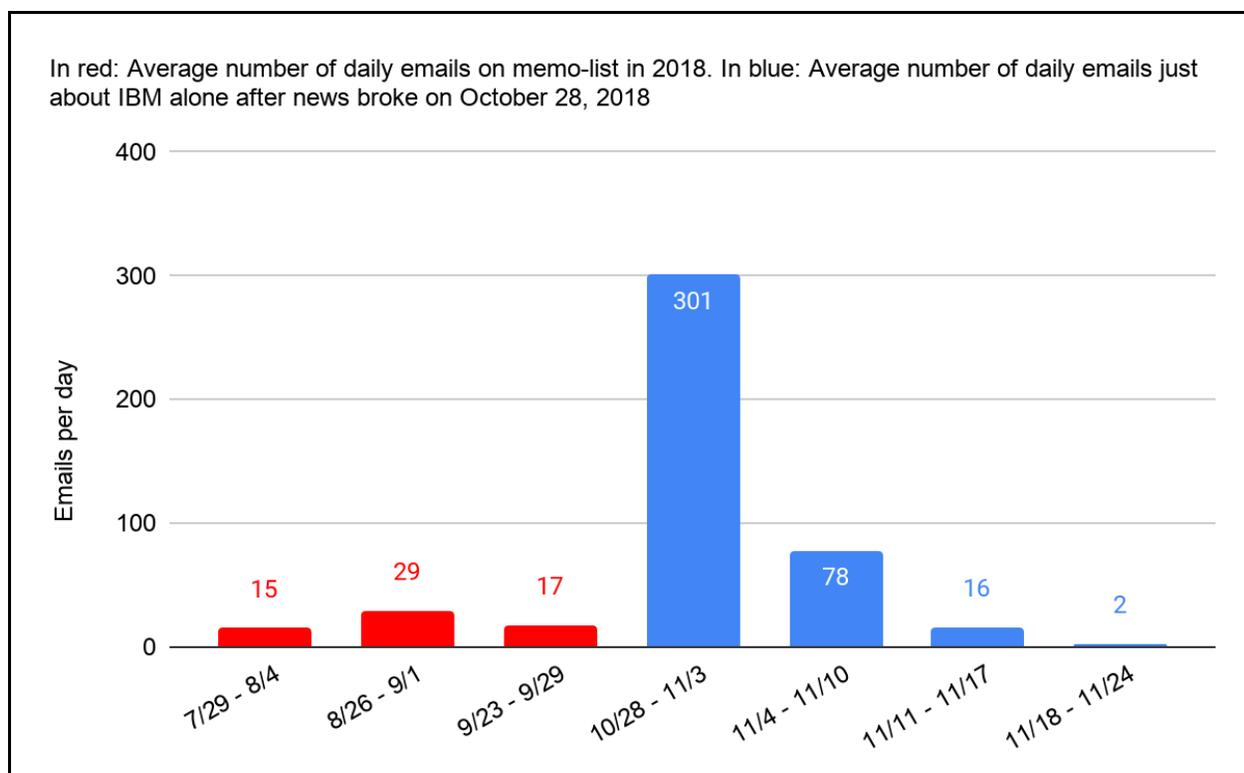
### **A \$34-billion surprise**

The news broke on the afternoon of Sunday, October 28, 2018, that tech giant IBM was going to acquire Red Hat for \$34 billion, which would make it the largest software acquisition in history. Months of market speculation and a bonanza of tech industry analyst opinions would follow until the deal officially closed on July 9, 2019. In the interim of those 255 days, a lot of uncertainty, fear, and guesswork showed up in the internal communications at Red Hat. Employees were told what to expect as best as the leadership could manage; due to SEC regulations, a lot of details were held close to the C-suite vest. Dissertations upon dissertations could be written about what this deal meant (and means) for open source and the tech industry.

For the purposes of my research here, and to illustrate why this move matters to the Red Hat corporate voice, I will focus on the days immediately following the public announcement. This chapter builds on the foundation presented in Chapter 2 regarding how the Content team crafts the Red Hat voice in collaboration across groups and with Red Hat audiences. It also builds on the evidence I presented that the construction of the brand voice depends on trust, credibility, and productive management of disagreement and conflict on the Content team and throughout writing communities of Red Hat. Specifically, in this chapter I incorporate the perspectives from other Red Hatters outside of the Content team to triangulate my analysis of rhetorical decisions made about Red Hat's brand voice from another viewpoint. Through analysis of internal communications as well as survey data, I argue that Red Hatters at the time of the study viewed the voice as effective and authentic, but under threat as a result of Red Hat's acquisition by the tech giant, IBM.

That public announcement of that acquisition was planned for Monday, October 29, and not Sunday; the story had leaked to the press. As a result, many Red Hatters learned of the acquisition from external news outlets and not from the company's senior leadership. This triggered a considerable cascade of questions within Red Hat, many of which played out on memo-list for the whole company to see. The first email about the news was sent at 2:19 p.m. (EDT) from an associate based in France, who linked out to a now-deleted *Bloomberg* article carrying the scoop. I started tracking the flurry of memo-list activity surrounding the IBM news, first out of curiosity and then for posterity. I'm glad I did, because it gives us a peek in time at the rhetorical situation in the nascent days of an evolving upheaval for Red Hat's cherished company culture.

To establish a baseline for memo-list activity, we need to look back to the fall of 2018. Red Hat has grown since then, adding thousands of employees, adding to its portfolio of offerings, and of course, the IBM acquisition has long since closed by now. Taking a sample of a random week of memo-list activity in 2020 doesn't quite give us the accuracy we need. So, let's look at typical memo-list activity at the end of each month in 2018 for the three months leading up to the IBM announcement (July 29 - Aug 4; Aug 26 - Sept 1; Sept 23 - Sept 29). In that timeframe, Red Hatters traded in total 143 emails per week, or 20.3 emails per day, as shown in Figure 3.1:



*Figure 3.1: Average daily email volume on memo-list before and after the week of the IBM announcement.*

The IBM news broke on October 28, and in that next week, Red Hatters sent a total of 2,106 emails just about IBM alone (an average of 301 per day). That's a 1,373% increase in internal company chatter in response to what many felt was an existential threat to the brand, the company culture, and by extension, Red Hat's voice and tone. In the following month, those numbers tapered off: 301 IBM emails per day came down to 78 in week two, 16 in week three, and 2 in week four. More context and news from senior leadership and the internal communications team helped to answer some, though far from all, employee questions, and though memo-list returned to more-or-less normal, activity about IBM flared up again in response to acute events and announcements, up to, through, and long after the deal officially closed on July 9, 2019.

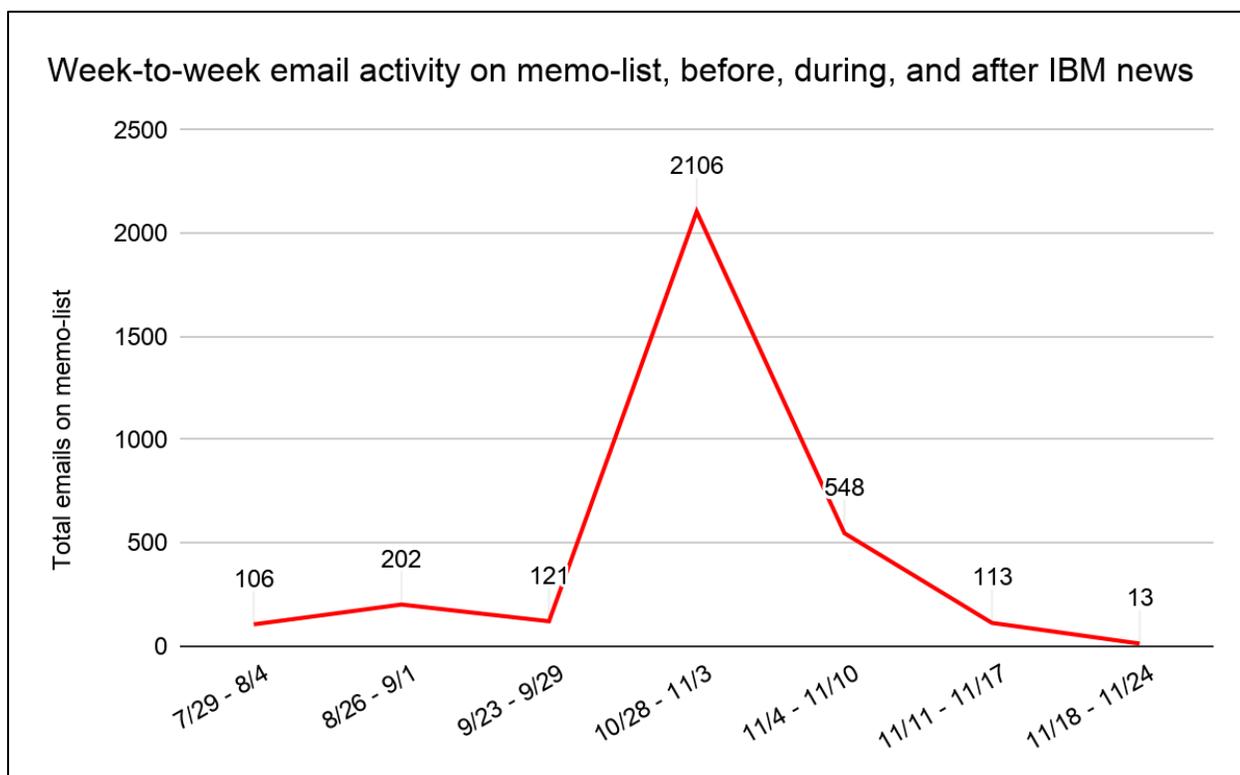


Figure 3.2: Email activity on memo-list in reaction to the IBM acquisition news

Why bother dredging up old email list archive numbers here? I do it to reiterate the enormous impact IBM's acquisition has had (and still has) on the company's culture and the fear, uncertainty, and doubt swirling around the future of its beloved brand and unique voice. I think those internal anxieties orbit around a central theme of this research into Red Hat: authenticity. At new hire orientation, fresh-faced employees take a tour of all things Red Hat, from the company's history to benefits to tips to avoid insider trading and, most of all, what makes Red Hat special for the people who work there. Because if you're told from Day One that you work for a unique company with a culture like no other—and you embrace it—it's understandable that you might be worried about that authenticity eroding, bit by bit, if Red Hat becomes more like IBM.

## **Is Shadowman losing his voice?**

In October of 2018, Red Hatters were already reeling from another major change to Red Hat's identity. The Open Brand Project, the 2-year project to evolve and modernize Red Hat's logo and brand identity, was underway for more than a year when the news broke of IBM's intended acquisition of Red Hat (more on that project in Chapter 4). These concurrent events in late 2018 gave Red Hatters plenty of reason to be concerned about the integrity and authenticity of the brand, the company culture, and voice going forward. Red Hatters were faced with perceived threats to the authenticity of the Red Hat voice, both from within and from the outside. The Open Brand Project concluded its first major phase April 29 - May 3, the week before Red Hat Summit 2019, by rolling out high-priority updates to the logo and brand identity across high-profile Red Hat assets and properties. The IBM deal officially closed two months later on July 9; six months after that, I introduced a survey to Red Hatters across the company, asking for their opinions on the integrity of the Red Hat voice.

In Chapter 2, I explored how writers on the Content team craft and represent the Red Hat voice to the world. From in-depth 28 interviews, I learned how and why the team spends so much of its energy and time building relationships—with each other, as a team with other teams across the company, and as individuals. I explored how these relationships are built on earning trust and credibility with internal stakeholders, and how disagreements are resolved when they arise. I discovered how new writers learn about the Red Hat voice and learn to write in the Red Hat voice, and what the team considers its strengths and weaknesses to be. In particular, I found that the team relies on data-driven decisions to build and maintain its expertise and authority, and how, over time, the team used data to make the case for its expansion and growing influence as a valuable marketing resource within Red Hat.

But interviewing the Content team only sheds light on part of the process. I need more data from other sources to help me see the corporate voice from a bigger picture and broader perspective. Some of that discovery will come in Chapter 4, when I survey and analyze how Red Hat's external audience at Red Hat Summit 2019 reacts to the marketing messages they see and hear. But before I venture past the hat, I need to look deeper under the brim. I need to investigate the opinions of Red Hatters outside of the Content team.

How do other Red Hatters feel about the corporate marketing voice, and do they think it accurately represents the authenticity of Red Hat's identity—even as it evolves? The in-depth interviews I had with Content team members were illuminating, and ideally I would have the opportunity to interview each of the 15,000 people who work at Red Hat about their role and how it uses or affects the Red Hat voice. In practicality, I designed an online survey with a mixture of quantitative and qualitative questions to distribute to as much of the company as I could reach. In this chapter, I introduce my research questions for this portion of my investigation of the Red Hat voice, then describe my methodology for designing this case study and survey, including the variables I included, why I chose them, what I hoped to learn, and how I distributed the survey at Red Hat. Next, I present my assumptions about the data and compare those to the results of the survey, focusing especially on variables related to discrepancies between new Red Hatters and experienced ones, and what the Products and Technologies (PnT) organization—which represents many of the internal stakeholders who collaborate with the Content team—thinks of the corporate marketing voice. Then, I explain my results, both the surprises and expected outcomes, tying those explanations back to the insights gleaned in Chapter 2 and drawing upon the relevant literature in rhetorical studies. Finally, I discuss the limitations of this study and what I could not include.

## Research questions

The work in this chapter primarily addresses the first of my three overall research questions for this dissertation, namely how a company's corporate voice and tone establishes authenticity for its employees, leaders, customers, and critics. As I have shown in this chapter and throughout the previous, Red Hat is an organization with fervently passionate employees who care deeply about company culture, and they are not shy when it comes to voicing their opinions on any and all aspects of it. Broadly, then, my research here centers on perceptions within the company about the company's voice, primarily from the employees who aren't tasked first and foremost to create and maintain it, like members of the Content team are. Respondents in this study include the marketers from the Products and Technologies organization (PnT), many of whom are on the other end of the collaborative writing process with my interviewees in Chapter 2. As opposed to corporate marketing, these marketers work in the more traditional, product-focused version of marketing that Balmer (2011; 2012) defined in Chapter 1. Given those strong opinions Red Hatters hold about the authenticity of the brand, what questions could we ask to learn how effective they think corporate marketing is at reflecting that authenticity to the outside world? In the context of those perceptions, these key questions arise:

1. What do other Red Hatters outside of the Content team think of the corporate voice?
2. How aware are other Red Hatters of what the corporate marketing team does?
3. How well do other Red Hatters think the corporate marketing voice authentically represents them and the company to the world?
4. Do they think Red Hat's voice and tone stands out when compared to other tech companies in the industry?
5. Are Red Hatters anticipate the Red Hat voice will change as a result of the IBM acquisition?
6. What can we learn about the corporate voice and tone from asking Red Hatters that we could not learn from asking the company's external audiences?

I sought to address those questions with a survey questionnaire sent to memo-list, the internal Red Hat email list that all employees are subscribed to by default when they join the company. Given the reactions employees had to the logo redesign project, and to the news of the IBM acquisition, memo-list seemed an appropriate venue to solicit feedback on the integrity of the company's voice and tone.

### **Initial assumptions about Red Hatters**

Based on my interviews with the Content team in Chapter 2, the anecdotal data I have gathered at each Red Hat Summit since 2017, and my years of copywriting experience within Marketing Communications, I have a few expectations about how other Red Hatters will respond to these questions. These assumptions may also apply to other large technology companies with an open culture and distributed writing responsibilities, especially when some writers are grouped with marketers and others with engineers.

- I am particularly interested in the relationship between the PnT organization and Marketing Communications, as members of each group collaborate and compromise to write public-facing marketing content. Because of that back and forth tension and negotiation about how Red Hat should sound, I believe the PnT organization will score their answers lower than the rest of Red Hat will.
- I am interested in the difference in responses between newer employees and more experienced Red Hatters. The latter have already seen some changes to the company over the years, and their perception of the voice and authenticity may be shaded by that experience, so I suspect that newer Red Hatters will rate the voice higher across the board than older employees. I also predict that more experienced Red Hatters believe that IBM will change the voice more than Red Hatters who have only been with the company a few years. Additionally, given the anxiety expressed internally about the Open Brand Project and the IBM acquisition, I assume that most Red

- Hatters will say that IBM has changed the Red Hat voice and that it will change it more.
- I think newer employees will say that Red Hat is a unique voice in the IT industry, as they have been at other organizations recently and haven't become indifferent about the Red Hat voice in the way that experienced Red Hatters might.
  - For the 5Cs of the brand guidelines, I believe Credibility will rank the highest across the organization, based on interviews with the Content team and how much time and effort goes into ensuring that claims are supported. Given the fickle nature of what people Compelling, I expect that to rank the lowest.
  - Based on the responses of attendees at Red Hat Summit 2019, I imagine that Red Hatters will say words like “digital transformation” and other high-level IT jargon will show up the most frequently on their list of buzzwords they would like to stop seeing.

## **Methods for this study**

Without the ability to interview every Red Hatter for an hour as I did with members of the Content team, I needed to design a survey broad enough to be distributable to all of Red Hat but specific enough to test certain questions that arose from the interviews in Chapter 2. Based on the sometimes-tenuous relationships between Content team writer and internal stakeholder, I was interested in singling out Red Hatters who occupy that latter role. Unfortunately, I lacked the ability to identify only those stakeholders and restrict the survey to them and them alone. Additionally, to preserve anonymity for my respondents, I could not ask for participants to identify themselves by role or job title. Instead, then, I had to focus more broadly on how Red Hatters outside of the Content team saw the work that Marketing Communications put out into the world, and assess whether they believed that work accurately represented their opinions and beliefs about what Red Hat should sound like.

I've seen enough internal surveys in my seven years at Red Hat to know what kinds of

standard questions employees are accustomed to answering, and how they are typically framed. This helped me understand what variables I could reasonably include as de rigueur. The People team (for most companies, this is Human Resources and Internal Communications) conducts dozens of surveys each year to gather employee feedback on everything from effective management styles to diversity and inclusion efforts to morale. IT frequently solicits feedback to understand how the tools, infrastructure, and policies they have put into place are being used, or ignored, by associates. Each department conducts their own assessments, and many teams do as well. Finally, individuals working on a passion project about open source or as part of their coursework will also reach out to other Red Hatters via internal email lists and the company's wiki.

Before I began the study, I sought and obtained IRB approval for human subjects research from NC State University. I then created the survey in Google Forms, using Red Hat's enterprise G-Suite tools. I wanted the ability to require an @redhat.com email to take the survey to restrict it to inside the company, but without collecting specific addresses that could jeopardize the anonymity I promised my participants. Google Forms gave me that balance. And it's a tool that Red Hatters are used to seeing for internal surveys, which I guessed would lower the barrier for participatory entry.

## **Demographics**

Basic demographic questions that are common to these surveys include **organization** (based on which executive is at the top of their hierarchy), **tenure length**, **region**, and **job role**. For example, I would select that I am in the Marketing organization reporting up to Chief Marketing Officer Tim Yeaton; I have been at Red Hat for seven years; I am based in North America; and I am an Associate Creative Director of Copywriting. I included three of these four

common survey criteria, excluding the job role to preserve participant anonymity as noted in my IRB application. For tenure at Red Hat, I divided the answer options into Less than 1 year, 1-3 years, 3-6 years, 6-9 years, and 10+ years. The format of the survey technically allowed me to list as many options for this question as I wanted, but I grouped responses into these five categories both to not overwhelm my participants with a wall of options and because of something Content team Kelly said in our interview, quoted in Chapter 2 as well: “It takes a year to know your job and it takes you three years to be good at it.” These five options, then, let me home in on Red Hatters who have been with the company for:

1. **0-1 years**, and are brand new without any institutional history.
2. **1-3 years**, and know their job well but not the larger company yet.
3. **3-6 years**, and understand the broader organizational goals and the technology portfolio.
4. **6-9 years**, and have seen Red Hat scale and mature from a few thousand employees to 15k.
5. **10+ years**, and remember when Red Hat’s voice was snarkier, more like a startup.

I assumed that survey responses based on these variables would show me how a Red Hatter’s idea of what is authentic to the corporate voice changes over time, and explore what, if anything, would be consistent between Red Hatters with a decade of experience apart.

Corporate Marketing is only one of many departments within Red Hat, and it is far from the most populated. In the three years I have been researching the Red Hat voice, I have learned to stop taking it for granted that other Red Hatters are familiar with the work my department produces, let alone that they have a data-driven opinion of it. It was important to establish that context within the request for participation, just as it was important to assess how familiar with the subject matter my participants were to begin with. By gauging familiarity, I planned to divide my data into groups of people familiar with the corporate marketing work and unfamiliar; the

latter could then be excluded from the meaningful follow-up questions regarding authenticity, uniqueness, and living up to the brand voice guidelines. In short, I wanted to avoid the situation of someone offering their opinions on something they know little to nothing about.

### **Survey sections**

Those questions of demographics and familiarity were included alongside variables designed to test for opinions about the effectiveness of the corporate voice from several aspects of it. The survey contained seven sections, described below. (A full copy of the survey, with questions, can be found in Appendix C.)

1. **Is Red Hat's corporate marketing voice and tone effective for our audiences and authentic to our brand?** This provided participants with a little initial context for the survey, and I noted that this survey would also be used for my dissertation research at NCSU.
2. **Informed consent form.** The final form I got approved through the IRB office at NCSU.
3. **Quick reset: What's this all about?** Here I briefly explained what we mean by corporate voice and tone, so my participants would understand what they were evaluating. In particular, I called attention to Red Hat's self-styled identity as "a trusted guide in enterprise IT and open source."
4. **A little bit about you.** Basic demographic questions about my participants, including how long they have been at Red Hat, which of the seven large organizations they belong to within the company (e.g., Products and Technologies or Finance), and the region in which they are based.
5. **Authenticity and corporate marketing.** Here I mentioned the core personality traits of the brand (open, authentic, helpful, and brave) to frame participants' responses to the next few questions, and mentioned the IBM acquisition. Questions in this section addressed how effective Red Hat's corporate marketing team represents Red Hatters, and whether the IBM acquisition has had or will have an effect on the way Red Hat sounds.

6. **The 5 Cs of the brand voice guidelines.** As discussed in Chapter 2, these five aspects of the voice—Clear, Concise, Consistent, Compelling, and Credible—offer us an accessible way to measure authenticity. I included the description of the 5Cs from the brand guidelines and asked participants to score, on a rating scale of 0-10, how well corporate marketing carries out each goal.
7. **Voice and tone in the IT industry.** Red Hat positions itself as unique in the tech industry to not sound like every other company or to fill its communications with jargon, buzzwords, and corporate fluff. This section aimed to test that claim.

### **Distribution**

On the morning of Wednesday, January 8, 2020, I emailed my survey to memo-list. Many employees filter out memo-list emails, many do not actively check it, and many are unsubscribed, but memo-list represents as close a thing to a single point of company-wide communication that I have access to. My recruitment email included the primary question behind the study in this chapter, namely: “Do Red Hatters think our corporate marketing voice is effective for our audiences and authentic to our brand?” I explained why I thought the study was important, and what they could expect from it. (The full text of the email can be found in Appendix B). I sent follow-up reminders in several of the company’s internal Google Hangouts Chat rooms. After five total weeks I had received 135 responses, and I closed the survey. I had hoped for something closer to 400 or 500 responses, but I could only keep it open for so long with the time constraints to finish this dissertation research.

In bringing this research request to memo-list, I tried to apply several lessons from the previous chapter’s list of highly effective content teams. From my interviews, I learned that the approach and attitude you bring to collaborators counts for a lot. I was careful to frame my request to participants with transparency as a researcher and genuine curiosity as a Red Hatter: The key sentence in that introductory email to memo-list was the stated goal of the research

itself: “Do Red Hatters think our corporate marketing voice is effective for our audiences and authentic to our brand?” I came as a coworker, not as a PhD candidate. I wanted to stay authentic to the company culture and the free-for-all nature of memo-list itself by using conversational language to describe a topic I know Red Hatters care deeply about, even if they can’t always articulate what makes an ad, keynote, video, datasheet, or email authentic or inauthentic to the Red Hat brand.

Chronologically, this was the third of three studies about Red Hat’s corporate voice and tone that I was conducting as part of this dissertation research. I had the benefit of knowing a little bit about how external audiences react to the company voice (the Red Hat Summit surveys that I discuss in Chapter 4) and a lot about how the writers, editors, strategists, and copywriters create and manage the craft of writing for Red Hat. This existing knowledge afforded me the opportunity to pair questions for other Red Hatters with the same questions I asked Summit attendees, and creating questions that assessed whether other Red Hatters agreed with the way the Content team described the corporate voice.

I anticipated that the organization a Red Hatter belongs to would influence their opinion of the corporate voice. I already interviewed the Content team, which belongs to Marketing Communications, but I didn’t want to exclude the rest of that department from the survey. However, I also didn’t want their responses to be lumped in with all of the rest of Marketing, so I created a separate demographics option to isolate Marketing Communications from the rest of Marketing. In particular, I was hoping for a substantial response from Red Hatters in the engineering-focused Products and Technologies (PnT) organization, which reports up to Red Hat’s Executive VP and President, Products and Technologies, Paul Cormier. The PnT organization counts among its ranks the vast majority of software engineers and similar technical

roles. In addition, PnT employs hundreds of product managers, product marketers, and marketing managers. These job roles are responsible for developing marketing strategy and messaging for each of Red Hat's 30 discrete products in its portfolio. As Balmer (2011; 2012) explains, brand, culture, and corporate identity are more in corporate marketing's purview, while traditional marketing focuses on the products and customers (though the lines sometimes get blurred at Red Hat). In that capacity, Red Hatters in PnT marketing act as the internal stakeholders with which the Content team collaborates to determine what to say about Red Hat's products and solutions and—just as importantly—how to say it.

In Chapter 2 I established that it is in that give-and-take that defining decisions about the Red Hat voice are made. It follows, then, to want to hear from the other side of that collaboration. Each product manager wants to create messaging that positions that product as the leader in its category, as a smart investment for customers, as a useful tool for enterprises to adopt, and that helps sell the product. The places where a potential buyer or user would see these messages is a diverse rhetorical landscape, from product pages on [redhat.com](http://redhat.com) to booth messaging at industry events to banner ads on popular technical publications to social media to billboards and to many more. Content team members want to use each of those placements and each of those products to represent Red Hat as a trusted guide in enterprise IT and a leader in open source, as a company that respects its audience enough to not waste their time with hifalutin jargon or untested claims, and to build a relationship that doesn't go in for the hard sell too early. Certainly, the two groups are not enemies or rivals, but they do sometimes find themselves at odds.

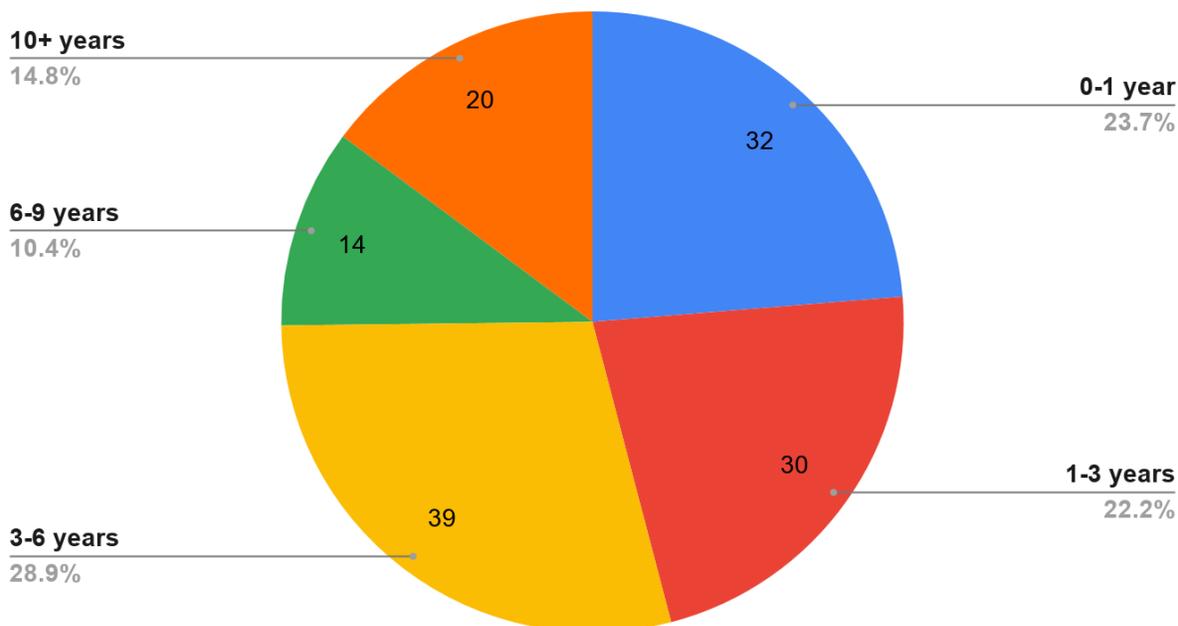
A quick note on impact: With only 135 responses from a company that employs more than 15,000, my data cannot and should not be interpreted as broad, sweeping claims

representing the state of Red Hat's opinion on the corporate voice. My pool of participants does not represent a census, and is therefore a sample; however, due to the method of contacting participants through an email listserv I am not able to confirm that it is a probability sample. It would be inappropriate to treat it as a representative sample and conduct statistical analyses assuming it is. Moreover, I am not a trained quantitative researcher, so instead of approaching this the way a quantitative expert might, I will interpret the results based on my institutional knowledge and expertise. What this study can offer is a glimpse to build on, a stepping stone to enterprise-wide understanding of how Red Hatters feel they are being represented by the voice of corporate marketing in a time of immense. The results of this internal survey provide an opportunity to examine the internal opinions of the corporate voice of a company coming to terms with its identity as it matures and expands beyond its roots as a disruptive open source pioneer.

## **Results and discussion**

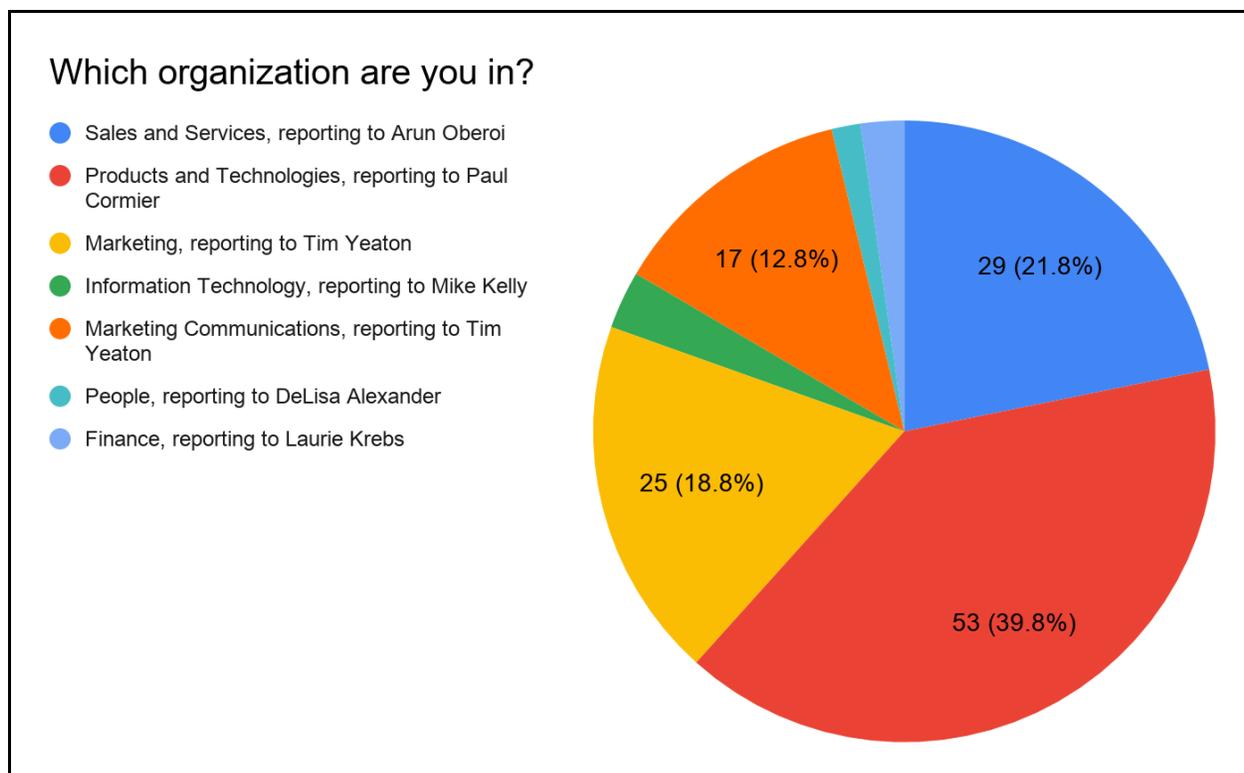
Though the demographic information available to me from these responses is limited, it does make it possible to consider the role that experience and organizational affiliation can play in assessing the efficacy and authenticity of the Red Hat corporate voice. As shown in Figure 3.3, my survey respondents come from a mix of tenures at Red Hat:

### How long have you worked at Red Hat?



*Figure 3.3: Survey participation by tenure at Red Hat*

Of the 135 responses to the survey, a quarter have been at Red Hat for at least 6 years, while just under half are relatively new to the company (under 3 years). Respondents can be organized into four roughly equal groups: new hires (0-1), newish (1-3), experienced (3-6), and longtime (6-9 and 10+, together). The distribution of respondents by organization, as shown in Figure 3.4, is less evenly distributed:



*Figure 3.4: Survey participation by organization*

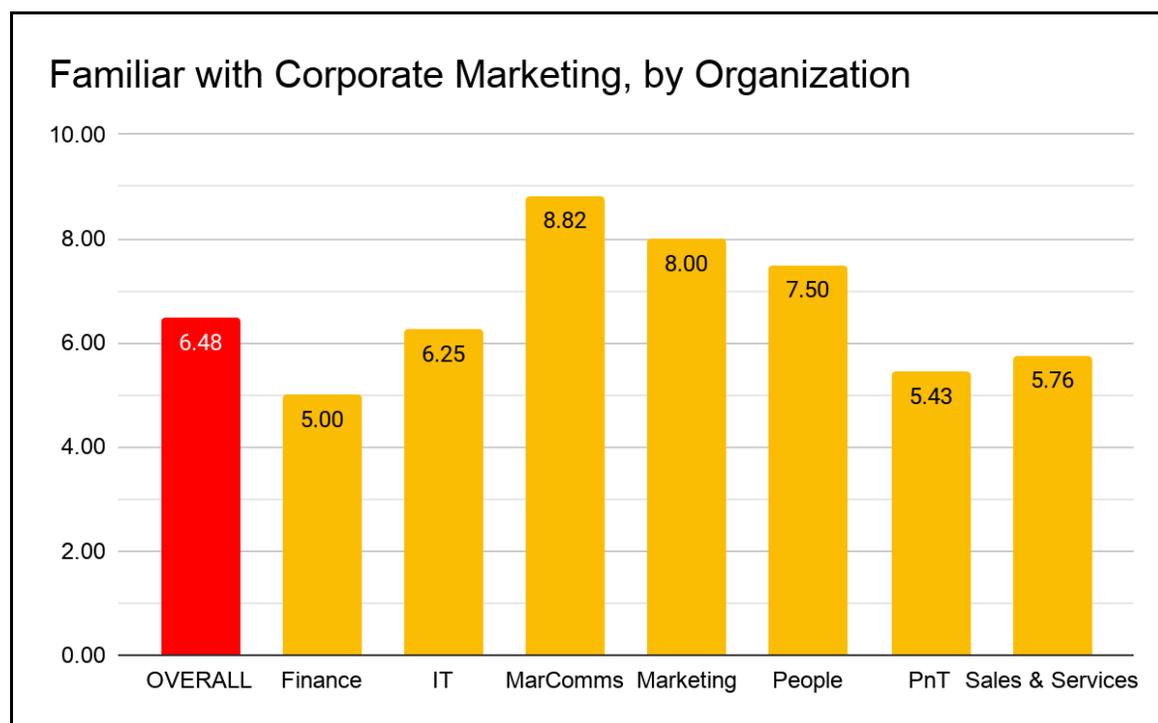
More than a third of participants come from the Products and Technologies (PnT) team. Responses representing Sales and Services were roughly equal to responses representing Marketing (Marketing + Marketing Communications). These demographics are skewed a bit for representing Red Hat's employee base by organization and region. As of May 2020,<sup>12</sup> PnT associates make up 41.4% of all company employees, which is close to the 39.8% represented in my survey, but Sales and Services accounts for 37.1% of employees, while in my participants they account for 21.8%. Marketing is over-represented here, as the organization only accounts for 6.8% of all Red Hatters but more than 30% in my study. Additionally, 63% (n=85) of respondents are based in North America, with 31% in Europe, the Middle East, and Africa (EMEA), and 6% in Asia-Pacific (APAC). Regionally, the actual employee breakdown is 42% in

<sup>12</sup> Red Hat internal data, current as of May 2020.

North America, 29% in EMEA, and 24% in APAC. No Red Hat employees participating in my survey are from Latin America.

### **Are Red Hatters familiar with what corporate marketing does?**

Until I began designing this study, I naively assumed that most Red Hatters would be familiar with the work that their corporate marketing team creates. Call it a case of being too close to the subject matter, perhaps, or one of the pitfalls of working within a 15,000-member organization. Naivete and assumptions aside, having the ability to segment responses based on familiarity also allows me to sort the available data into two groups: those who are familiar with the work of the corporate marketing team (as indicated by a score of 6 or higher, out of 10), and those who are less familiar, or even unfamiliar (as indicated by a score of 5 or lower).



*Figure 3.5: Familiarity with corporate marketing by organization*

Overall, at 64.7%, participants were mostly familiar with the work that the corporate marketing

team does. Of note here in particular is the 5.43 rating from the Products and Technologies (PnT) organization. They had the largest response group, with 53 completed surveys, so the largest response group for the survey was only about 50% familiar with the work represented by the corporate marketing voice.

### How effective and authentic to Red Hat is the corporate voice?

There are a lot of different ways to phrase this question, both for me as a researcher and for the company's employees as study participants. All seem limited or imperfect, somehow, for answering the overall research questions driving this study. This line of thinking falls prey to the kind of stylistic binary that Lanham (2006) cautions against, saying, "We like to think, especially if we are of a scientific turn of mind, that information comes without packages, just the 'raw data'" (p. 27). And of course as Burke would say, any way of asking the question is a way of not asking it another way, but the data I collected from the question as written provides a lot to consider in my analysis.

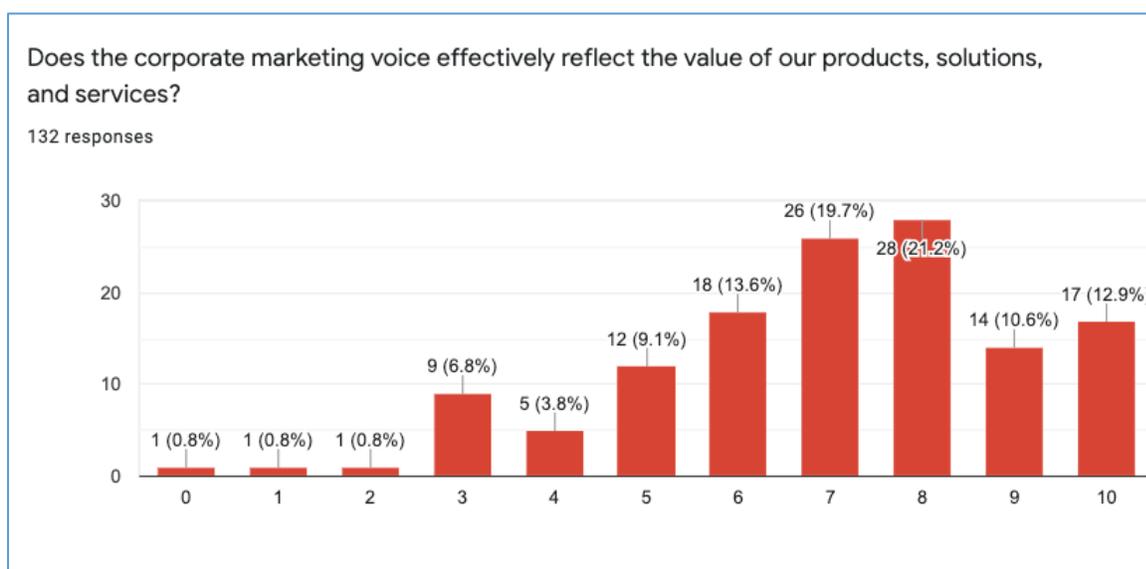
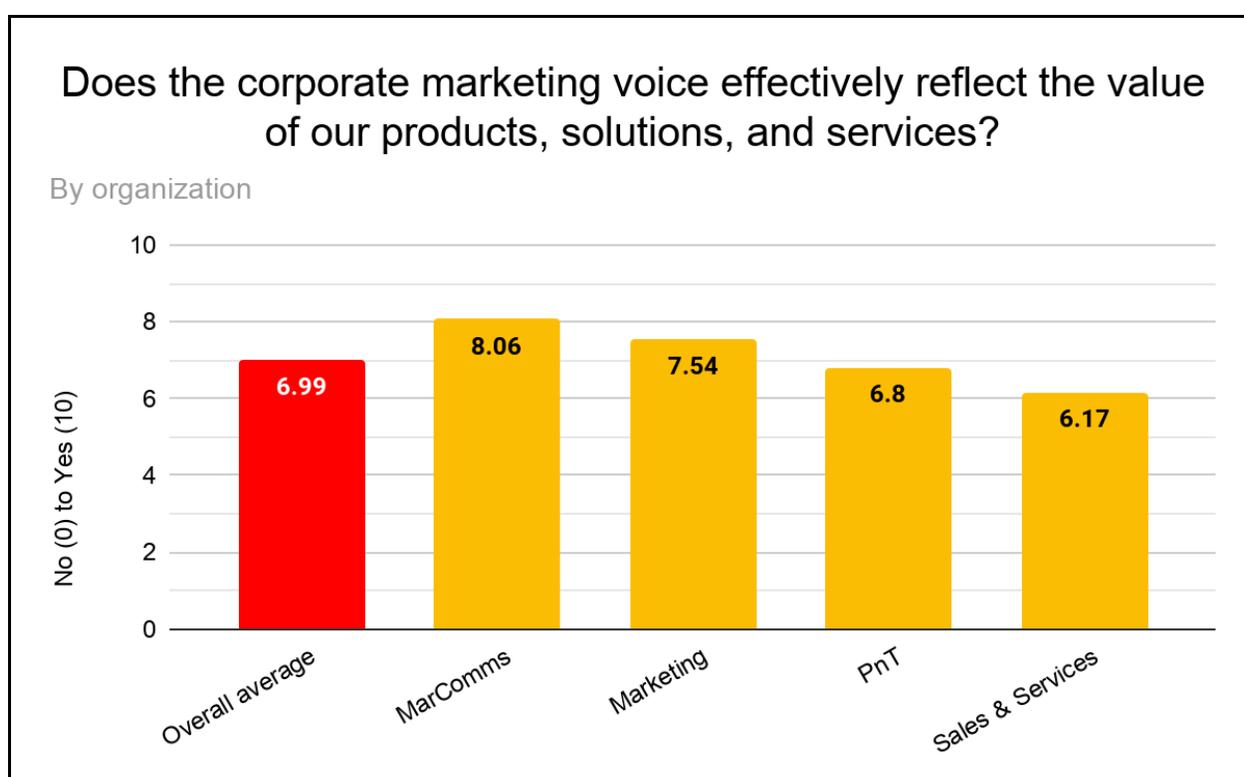


Figure 3.6: Survey responses for how well the corporate marketing voice reflects Red Hat

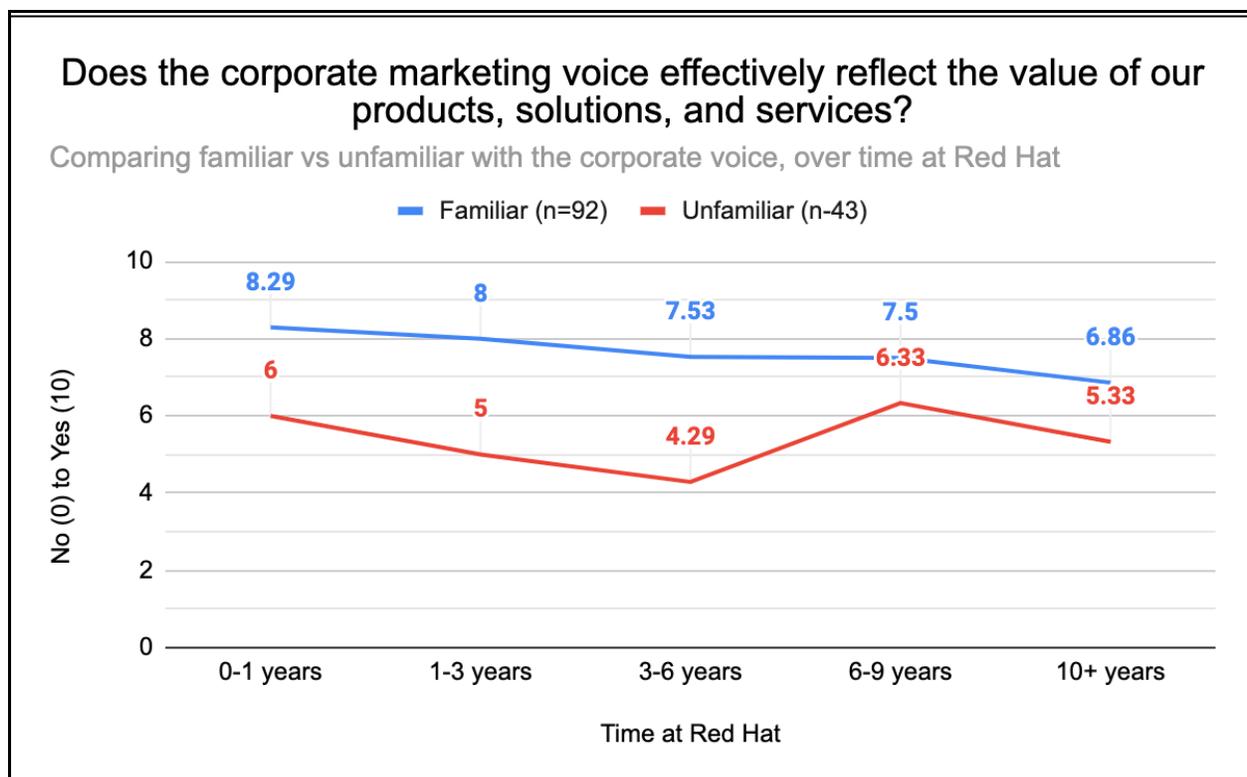
Participants were asked to rate this question on a scale of 0-10, where 0 means "No, the

corporate marketing voice does not effectively reflect the value of our products, solutions, and services,” and 10 means “Yes,” it does. If we accept that anything over 5 is positive and anything under 5 is negative, then we can see that the majority of Red Hatters (76% without including the responses for 5, or 85% with it) say that the corporate marketing voice reflects the value of Red Hat’s portfolio and offerings. Between 68-76% of responses said they are familiar with the marketing assets the team produces, so the results indicate that the corporate marketing voice tracks well with what Red Hatters expect the voice to do.



*Figure 3.7: Difference in opinion of the corporate marketing voice, by organization*

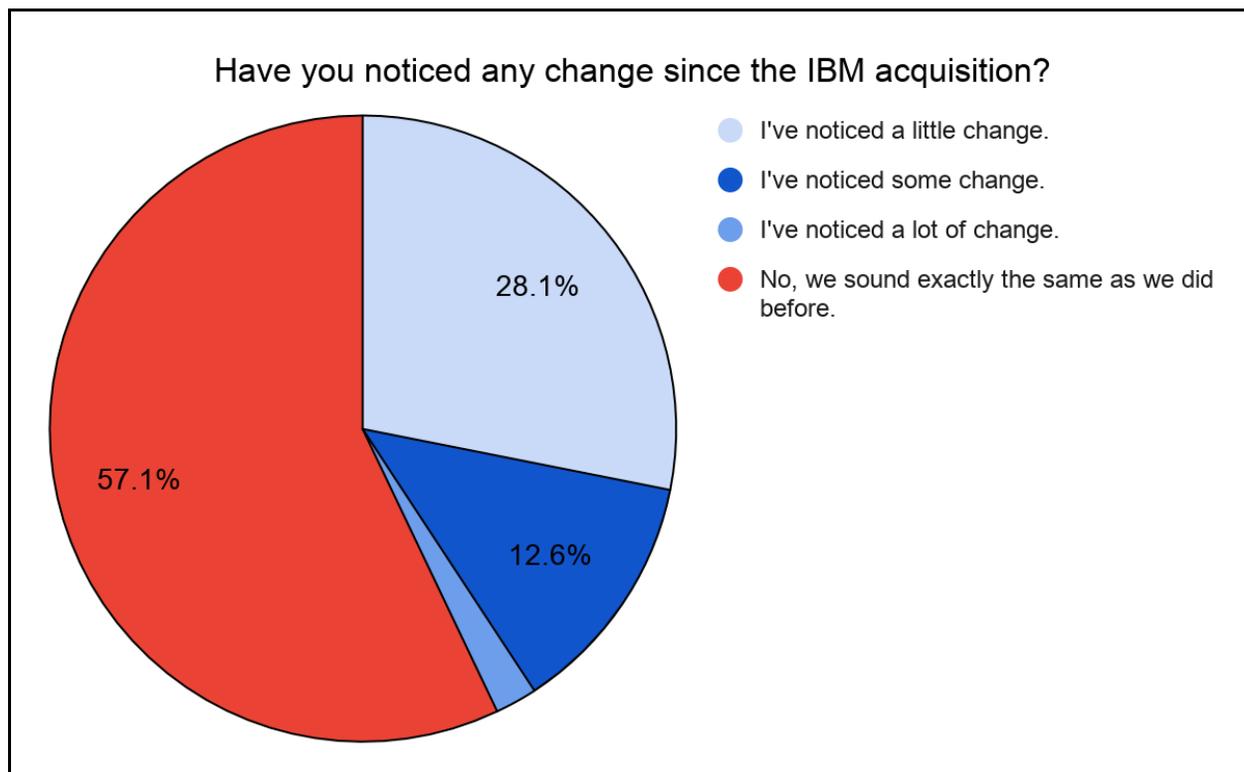
Overall, participants mostly agreed that the corporate marketing voice is authentic to Red Hat, but PnT and Sales & Services were both below the total organization’s average:



*Figure 3.8: Change over time of opinions of the corporate marketing voice*

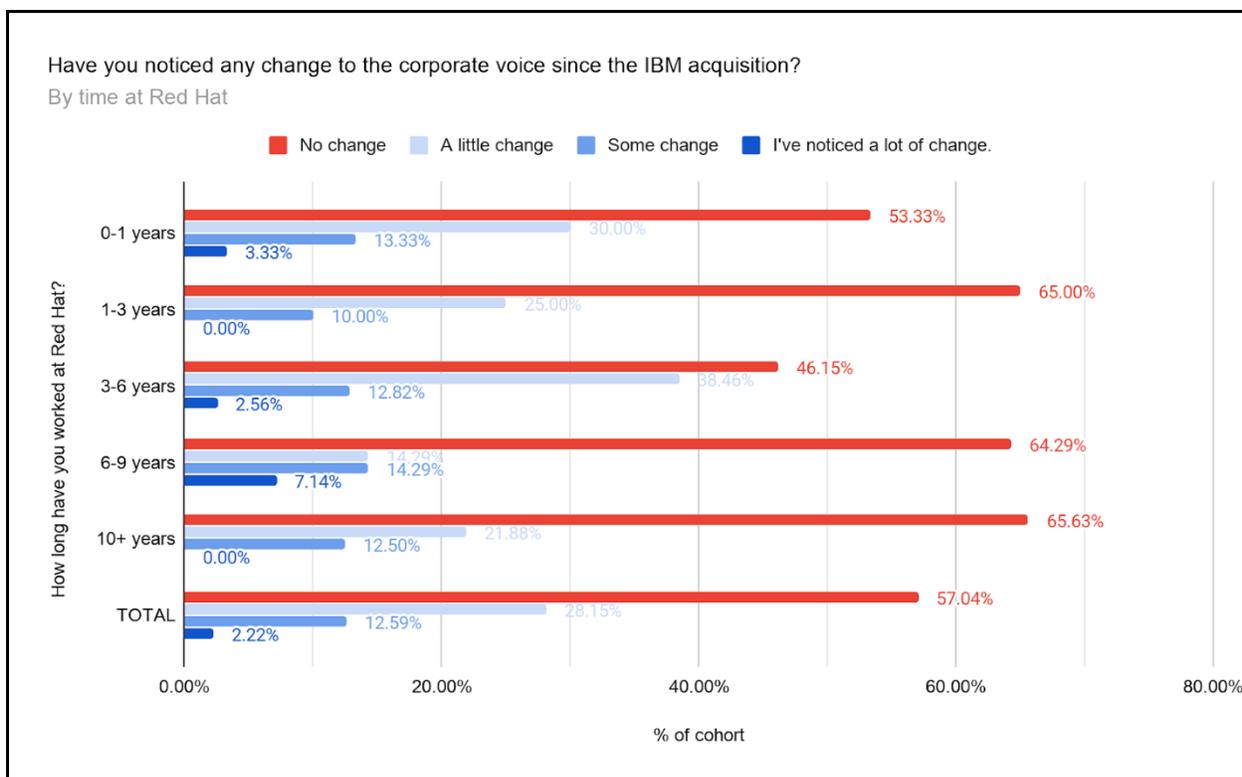
If I break apart the responses between those who are familiar with the corporate voice (who gave a score of 6 or higher) and those who are unfamiliar with it (who gave a score of 5 or lower), the responses seem to indicate that for Red Hatters who know the corporate marketing voice, the longer they work at Red Hat the less they think it represents the brand. For those unfamiliar, there is a two-point jump from the 3-6 year to the 6-9 year cohort. Obviously, with this small of a sample size I cannot make broad assumptions, but this would be interesting to pursue further in follow-up studies. The respondents indicated that the longer you work at the company the less you feel the corporate marketing voice accurately reflects Red Hat.

### How much does the IBM acquisition affect the corporate voice?



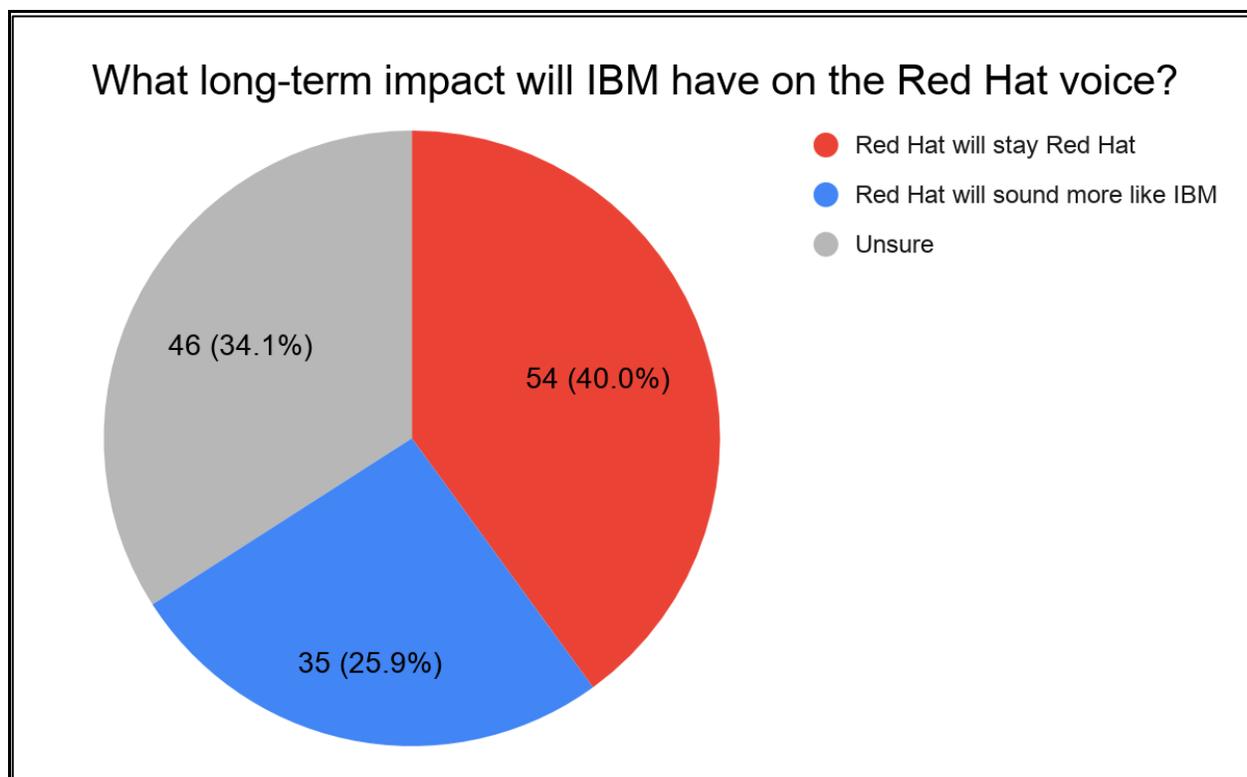
*Figure 3.9: Change in the corporate voice since the IBM acquisition*

Overall, 57% (n=77) of Red Hatters in this survey have not noticed any change in the way Red Hat sounds in the 6 months since the IBM acquisition closed in July 2019. 12% (n=17) have noticed some change, and only 2% (n=3) have noticed a lot of change. No one reported that Red Hat sounds completely different than before the acquisition.



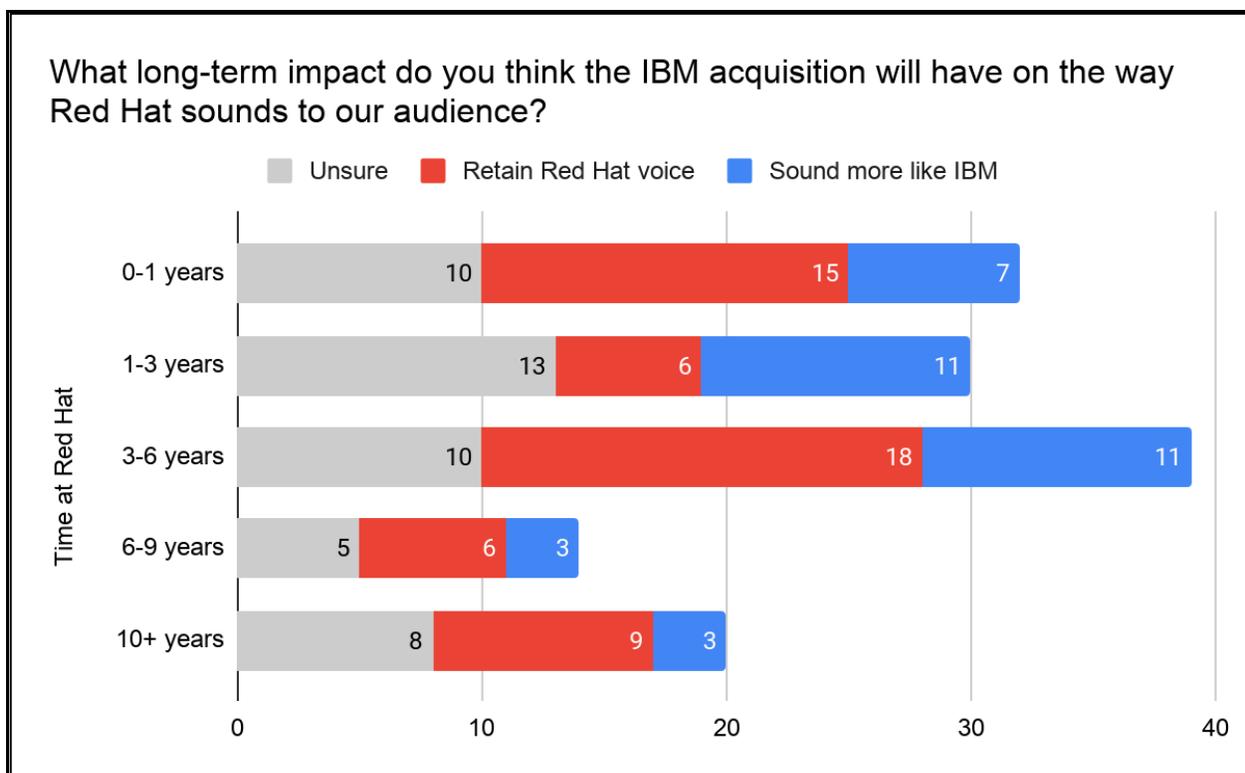
*Figure 3.10: Change in the corporate voice since the IBM acquisition, by tenure*

Red Hatters who have been at the company from 3-6 years represent the single biggest cohort of respondents in the survey results, at 28.9% (n=39). They have also noticed the most change since the acquisition, if we look at how much change each cohort of Red Hatters has noticed.



*Figure 3.11: Anticipated long-term impact of IBM on corporate voice*

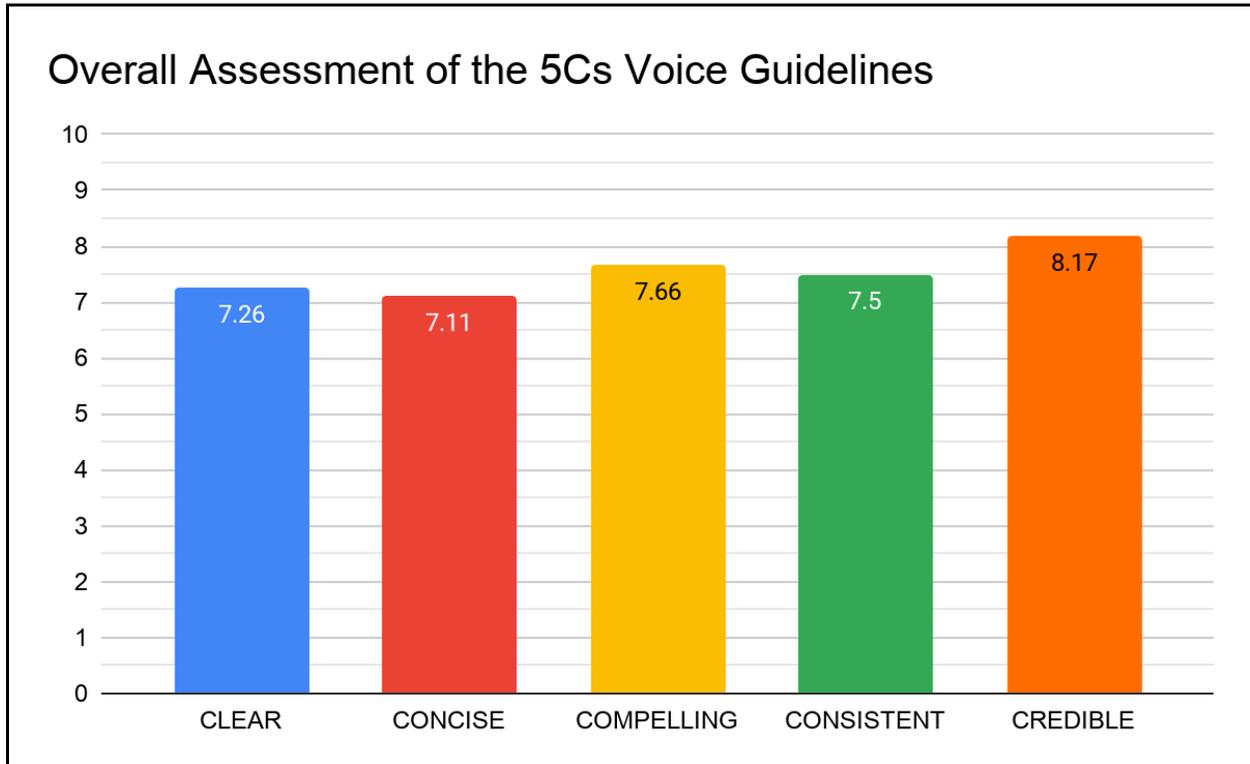
Looking toward the future, only a quarter of participants think Red Hat will sound more like IBM, while a plurality (40%) believe Red Hat will retain its authenticity. And with only 6 months between the closing date and this survey, a third of Red Hatters are unsure about the future of the corporate voice.



*Figure 3.12: Anticipated long-term impact of IBM on corporate voice, by tenure*

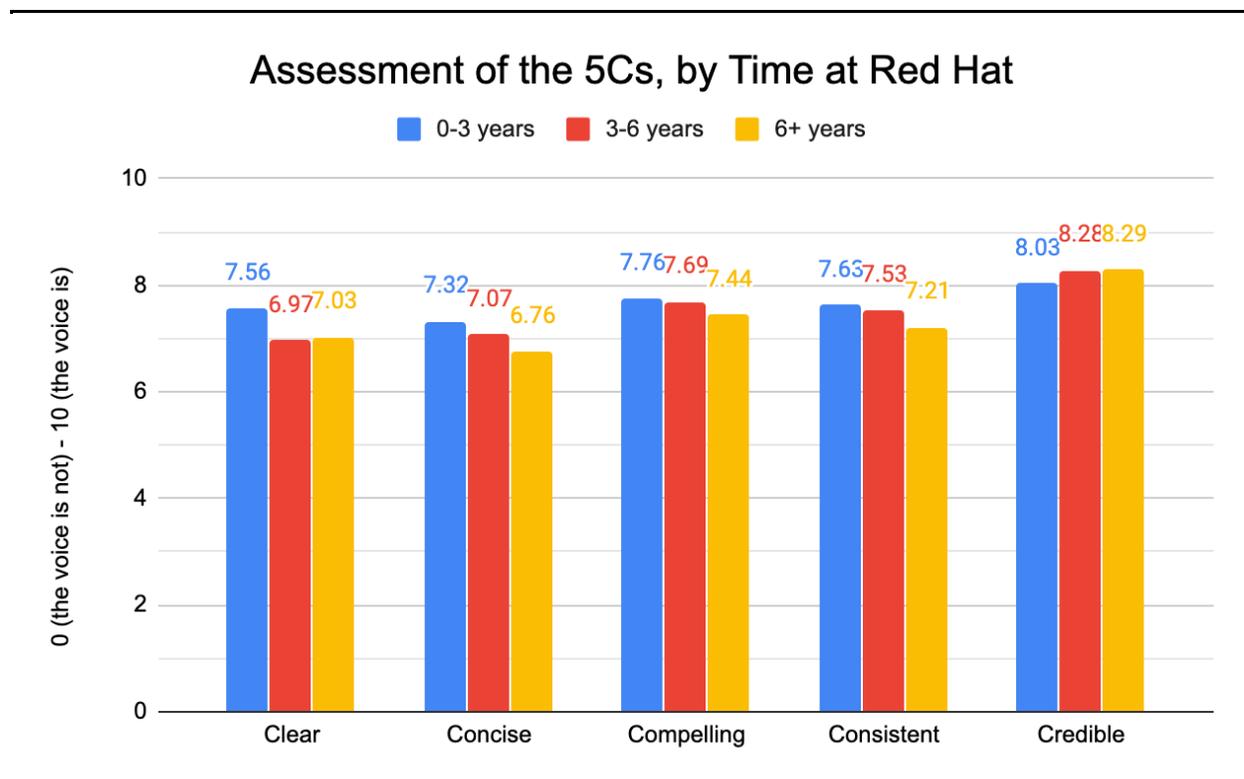
Red Hatters who have been with the company 1-3 years and 3-6 years were the most likely to think the corporate voice will sound more like IBM going forward.

### How do Red Hatters rate the 5Cs of the brand voice guidelines?



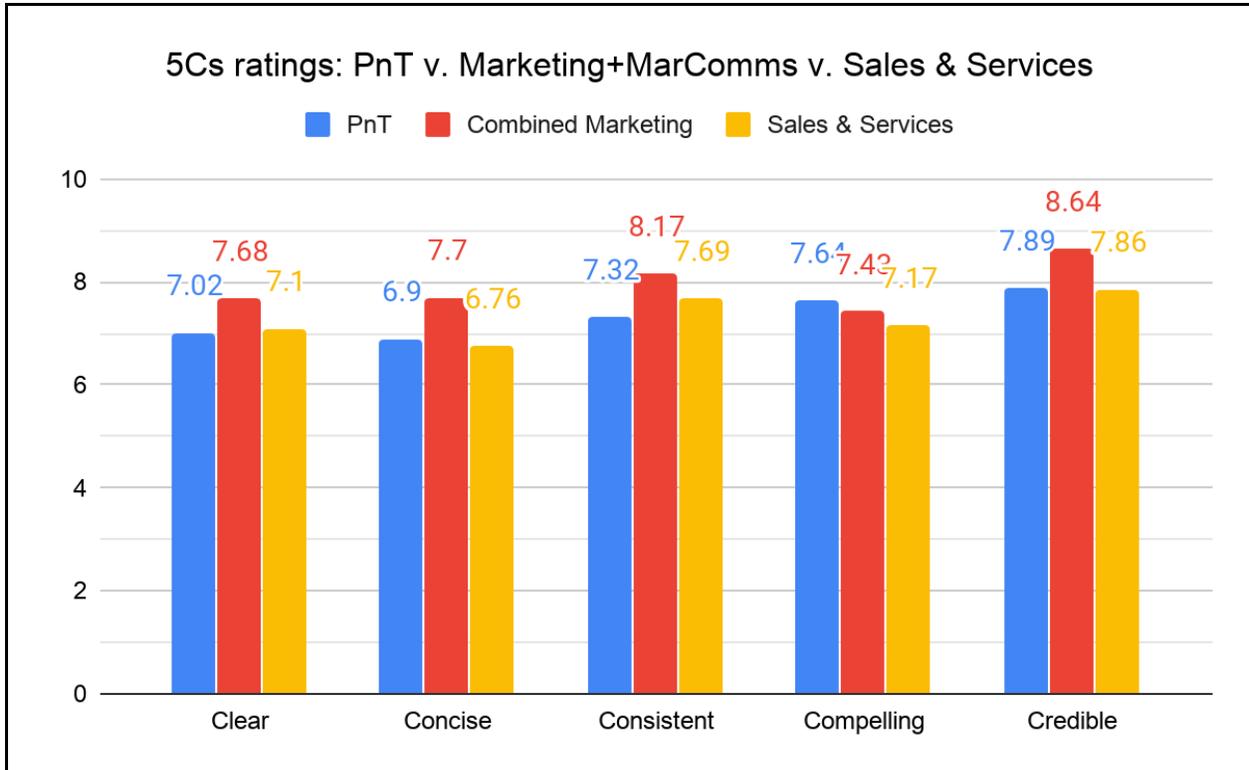
*Figure 3.13: Respondent opinions of each aspect of the brand voice guidelines*

Here, the corporate voice gets strong marks across the board with an average rating of 7.54. Credibility stood out highest among the aspects, and the results indicate that Red Hat's corporate marketing could improve by being more concise.



*Figure 3.14: Respondent opinions of each aspect of the brand voice guidelines, by tenure*

Cutting the responses up by cohorts based on time spent at the company again shows a subtle consistent trend: your opinion of the Red Hat corporate voice declines slightly the longer you work there. One exception here is, again, Credibility, which improves over time. The other exception is Clear, which ticks very slightly upward again for more experienced Red Hatters.



*Figure 3.15: Respondent opinions of each aspect of the brand voice guidelines, by organization*

When the results are sorted by organization, I am not surprised to see that Red Hatters who work in marketing have a higher opinion of the corporate marketing voice than those who do not. Speaking for myself, at least, I hope that my work is valuable and useful. The exception to this trend is with Compelling—the PnT respondents rated the voice slightly higher than Marketing.

### Is Red Hat's voice unique among companies in the tech industry?

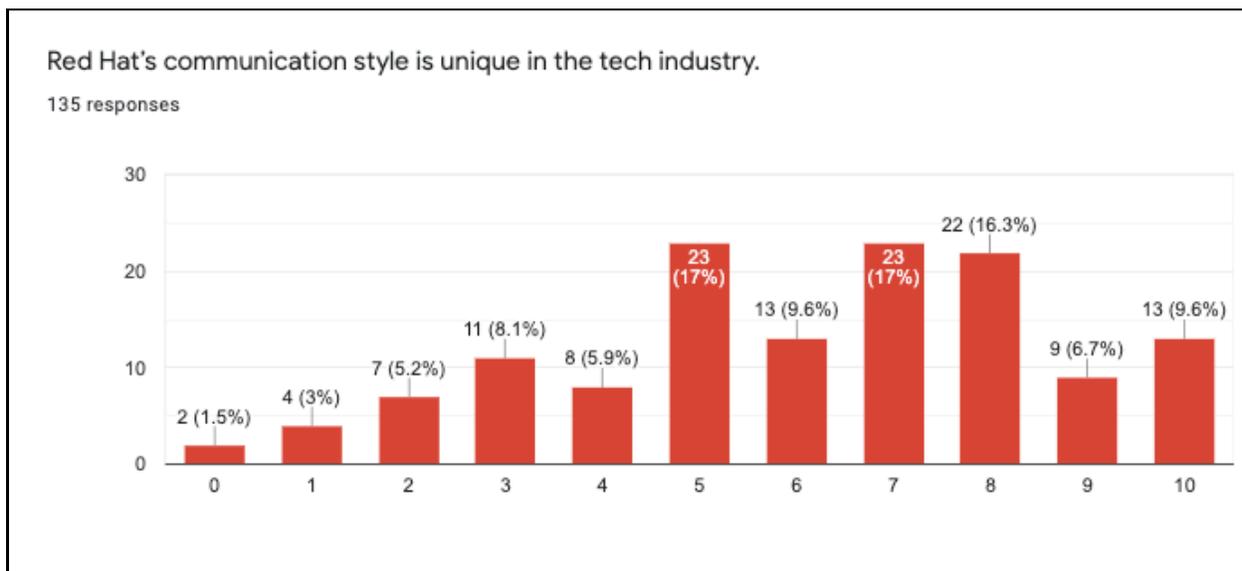


Figure 3.16: Respondent opinions of how unique Red Hat's voice is in the tech industry

Overall, 61% of survey participants agree that Red Hat's corporate marketing is unique in the tech industry, and a nearly identical number (61.5%) agree that Red Hat uses less jargon than other IT companies.

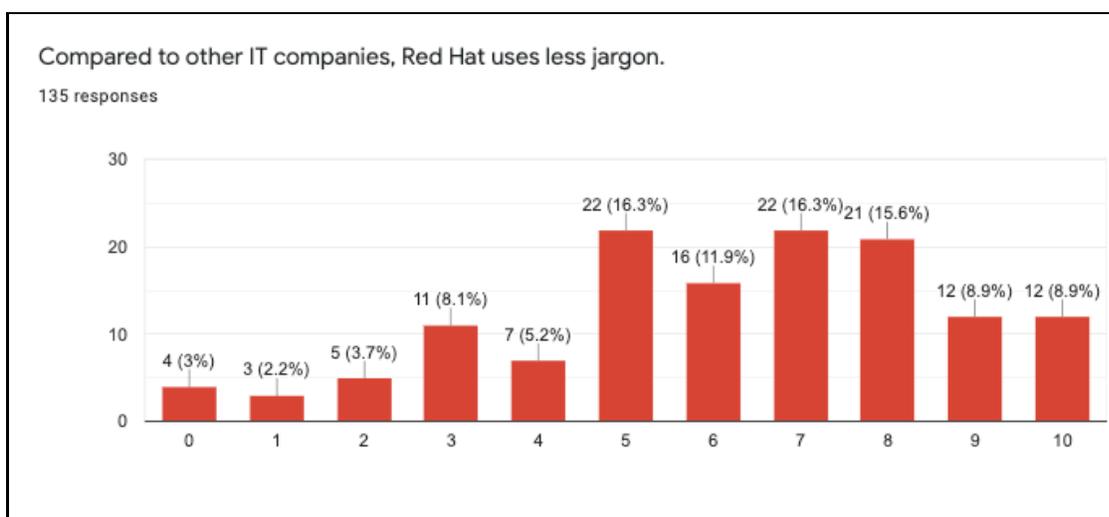
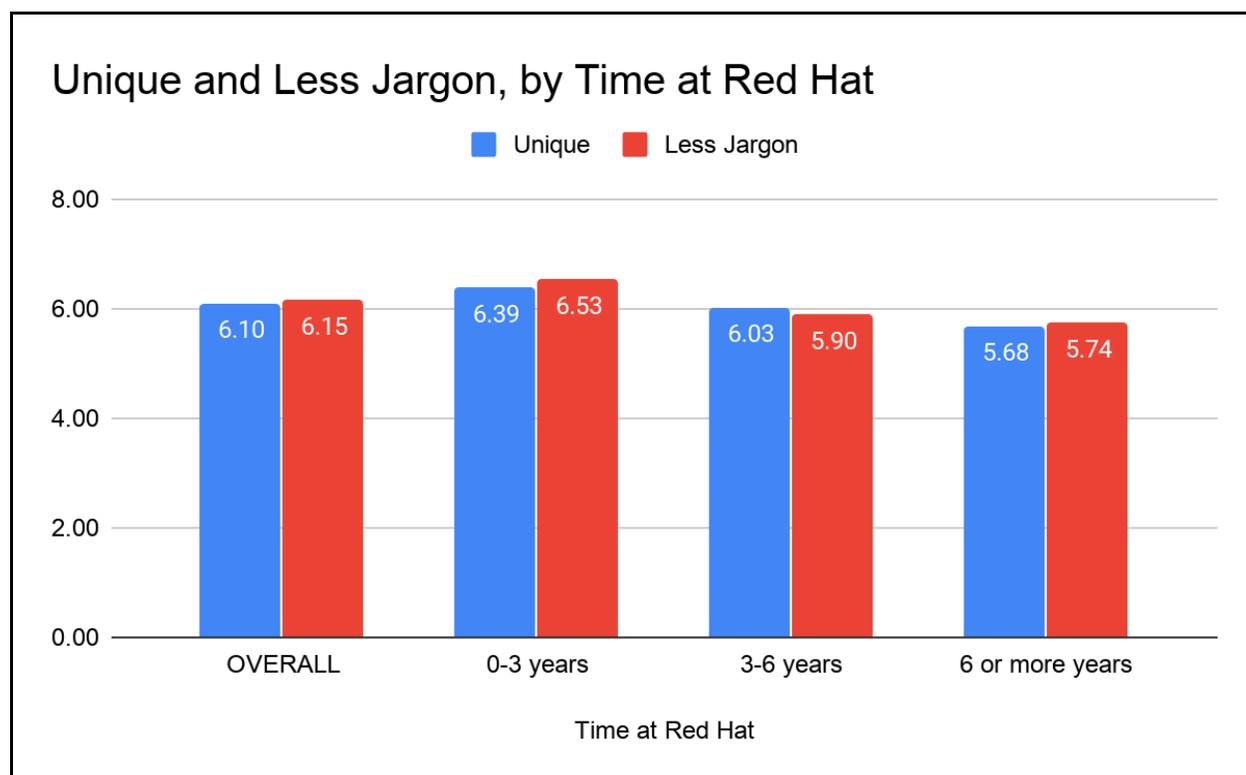


Figure 3.17: Comparison of Red Hat's use of jargon to other companies

If we look at these two questions by time spent at Red Hat, we see a similar trend emerge

from the details. As with the overall assessment of effectiveness and the 5Cs, the amount of time you've been a Red Hatter seems to be related to a slight decline in your opinion of the voice as unique in the industry and heavy on jargon.



*Figure 3.18: Comparison of Red Hat's use of jargon to other companies, by tenure*

### **What about jargon? And what about other companies have a clearly defined voice?**

Red Hat employees listed plenty of jargon and buzzwords they feel have suffered from overuse, with a robust list of both business and technical jargon:

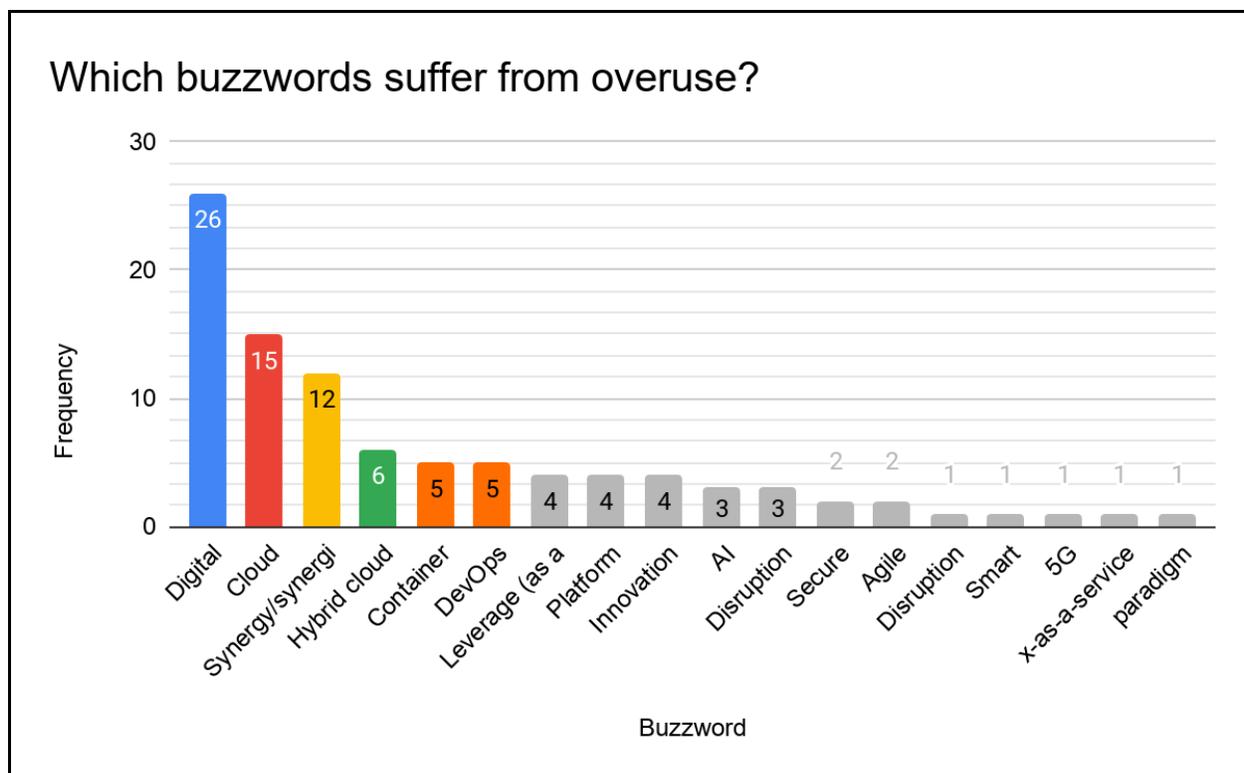


Figure 3.19: Most frequently cited buzzwords

“Digital transformation” lead the responses with 26, and the generic “cloud” followed with 15. The ever-dreaded “synergy” took third place with 12. The next most commonly cited business jargon was “leverage” (as a verb) and “innovation” at 4 each, while on the technical side Red Hatters took issue with “hybrid cloud” at 6 and “container” and “DevOps” at 5 each. Red Hat’s corporate marketing messages certainly have some buzzwords in them, but as we saw earlier, more than 60% of survey participants agreed that Red Hat uses less jargon than other IT companies. Which IT companies do Red Hatters look to as examples of a good company voice?

In one of the few short answer questions in the survey, I asked participants to name other IT companies that have a clearly defined marketing voice that speaks to them in particular. I also asked participants to elaborate on what, exactly, appealed to them about the way that company communicates. (I will address the second half of this question in the Discussion section later in

this chapter.) About a third of respondents (48) offered examples, and of those mentioned, only 8 companies appeared more than once, as shown in Table 3.1:

*Table 3.1: Tech companies that Red Hatters named as having a clearly defined marketing voice*

<b>Company</b>	<b>Frequency mentioned</b>
Apple	6
Microsoft	6
Google	5
Amazon/AWS	4
GitHub	2
DigitalOcean	2
Basecamp	2
Salesforce	2

A total of 28 different companies were mentioned, though less than half of those are IT companies.

### **Products and Technologies**

I will now return to my initial assumptions about how Red Hatters would answer the survey. The data showed that most of my assumptions about Red Hatters across the company were correct, but with a few surprises. I expected Red Hatters in the PnT organization to have a lower opinion of the corporate voice overall than other Red Hatters, which the results indicated was accurate. The results also indicate that the PnT organization rated the 5Cs with lower scores than the Marketing organization. This was expected because of the collaborative process of argument, negotiation, and compromise over the messaging of Red Hat products that I identified in Chapter 2 between writers on the Content team and their counterparts in business units from

the PnT organization. I identified how valuable building relationships with stakeholders is to the work of those writers, and how repeated interactions in a collaborative relationship that do not improve could lead to a soured opinion between writers and stakeholders., as Max indicated in our Chapter 2 interview. They talk about building a relationship brick by brick, where each brick is another action—answering questions honestly, giving honest feedback, helping a stakeholder with a problem. And, Max says, “every person that you add increases your sphere of influence. And that person tells another person. But it works like anything, there’s one f\*\*\* up, one bad day, one raging at somebody—whatever it is—can poison that well.” Follow-up interviews with those stakeholders could yield insightful explanations for this lower score.

### **Tenure**

I also expected that employees who have been at Red Hat for a longer time would rate their opinions of the corporate voice lower than new Red Hatters, and the results indicated that they do. The downward trend holds true for Red Hat’s overall effectiveness, its uniqueness in the industry, its use of jargon, and the opinion of the 5Cs (except for Credibility). In almost every aspect, Red Hatters who occupy the middle ground in my study, which is to say those who have been with the company for 3-6 years, also find themselves squarely between newbies and old hands in their opinion of the corporate voice. (The one notable exception to this trend is for Credibility.) What accounts for this decline? It could be that the longer someone works in tech--at any company--the more cynical they get about the distance between what a company promises and what a company delivers. Perhaps members of the old guard look around and see a Red Hat voice they don’t recognize, as its core identity as a revolutionary upstart in the IT world has morphed into a mature, stable, trusted leader in enterprise open source. For Red Hat specifically, if someone has been with the company for 6 or more years, they’ve seen the workforce more

than double, from 6,300 employees in February 2014 to more than 15,000 in early 2020.

Anecdotally, I've seen email threads and swag requests that say they miss when the Red Hat voice was edgier and had more punch and snark, the kind of voice and tone you might find at a startup today. Longtime Red Hatters might remember the early days when Red Hat was a disruptor in IT instead of the well-established trusted guide in enterprise open source. When the company matured the voice had to as well. The company's rapid growth also meant that the employees came from more walks of life, and not just die-hard open source evangelists and acolytes. As then-President and CEO Jim Whitehurst said on an internal webcast in October 2019, "Every 2 years, roughly half the people at Red Hat are new." This could have led to more acceptance of technologies and behaviors not grounded in open source. Veteran Red Hatters, for instance, have seen proprietary (non-open source) tools make it into the company's internal IT decisions, such as moving from the open source email platform Zimbra to Gmail as part of the enterprise G Suite platform the company adopted.

From the interview in Chapter 2 with Mason, who has been a writer at Red Hat for more than 12 years, I learned how the corporate voice demonstrated that change away from disruptor and toward institution as the company matured:

On the brand side, the brand voice or the brand messaging became more customer-centric, more about solving problems with them and less about how special we were because we were open source. And so when we became more customer centric, we also had to adopt industry standard language. And we had to talk about business problems instead of just problems.

The loss of that emphasis on being special because of open source might contribute to a lower opinion of the voice over time. I, myself, have seen some of that opining play out in one of my responsibilities as an Associate Creative Director and senior copywriter to review requests

for custom swag that the Brand team forwards on to me from Red Hatters across the company and the world. All teams have access to Red Hat's Cool Stuff Store, which is also publicly available, and it is stocked with official Red Hat swag (e.g., pens, hoodies, webcam covers, and t-shirts). But many teams want something more unique and less inclusive, and those are frequently inside jokes, puns, or references to pop culture. When we have to say no, or suggest alternatives, we try to remind people that these shirts won't just be seen at Red Hat, by Red Hatters, but will go out into the world and represent the brand and the company voice. A common refrain will be that the approved options aren't fun or edgy and don't have enough personality. The Brand team has been described as "the fun police," as one requester put it in a reply to revised suggestions. To put it succinctly, some Red Hatters with a longer institutional memory recall or even still have swag from the 2000s that the Brand team approved that would never get through today. This likely frustrates them, and might be something they drew on while completing my survey.

## **IBM**

The results indicate that a majority of the Red Hatters who took my survey agree that the IBM acquisition has not changed the Red Hat voice, but only 40% anticipate that Red Hat will retain its authenticity and independent corporate voice in the future. More than a third indicated that they are still unsure about the long-term impact of the IBM acquisition on the way Red Hat sounds to its audience. Red Hatters who have been with the company for 1-3 years were the only group in this question for whom the majority did not think Red Hat would retain its voice over the long term. This cohort joined Red Hat some time between January 2017 and January 2020—the Open Brand Project kicked off in January 2017 and the IBM news came in October 2018, so they have never known a Red Hat that was not going through major changes to its brand identity.

That could account for their belief that Red Hat will end up sounding more like IBM.

The majority of Red Hatters in this survey have not noticed a change since the acquisition, but 43% have, to some degree. IBM's acquisition and its effect on the corporate voice is one of only three questions that included a long answer text option: "If you think we have changed, can you explain what you've noticed?" The question preceding that one asks how much change the respondent has observed—none, a little, some, a lot, completely different. Of the 135 respondents who took my survey, 40 respondents offered explanations for the changes they have noticed about the Red Hat voice since the IBM acquisition deal went through. They can offer us some insights on how Red Hat's authenticity has changed in response to IBM. I identified five categories of common responses. I will discuss the three with the most responses below, with the number of responses that fit each, presented here with selected comments.

**"Red Hat is still Red Hat"** (9 of 40) — these responses observed that Red Hat's marketing efforts are going out of its way to reassure people that Red Hat is not changing and that it will retain its independence and corporate brand identity.

- "I don't know if this makes sense, but I feel like we've been *\*more\** Red Hat in an attempt to differentiate ourselves from IBM, and let people know that we're still the same company after the acquisition." — A little change, PnT, 3-6 years at Red Hat
- "Lots of language seems designed to ease RHers and long-time customers." — A little change, PnT, 0-1 years
- "I think it is more true to the Red Hat personality than before." — Some change, MarComms, 3-6 years
- A bit of trying to wade murky waters, with an emphasis on quieting uncertainties by standing up for Red Hat culture. (This is a good thing.) — Some change, PnT, 0-1 years
- OK. to be fair, the brand change happened right around the time of the acquisition. I can't say anything definitive [sic], but it honestly feels like you are trying so hard to

make sure you aren't influenced by IBM that it feels like its' [sic] own form of Influence.” — A little change, PnT, 1-3 years

The answers here indicate that participants have noticed how Red Hat acted in response to the perceived criticisms or fears about its core identity. That fits with the approach to kairos that I covered in Chapter 2, argued by Edbauer-Rice (2005). The rhetorical situation is not something someone reacts to, nor is it created by their reacting. Instead, it is co-constructed and it co-evolves. Red Hat, according to these respondents, is making overtures of commitment with its performative identity to reassure its audiences that no matter who buys the company they cannot buy out or cancel the culture.

**More cautious** (8 of 40)— these responses observed that Red Hat’s marketing efforts are not bold or outspoken, as if the “Brave” element of the brand standards personality list was silenced for a while.

- “I think we've become more conservative. I find it interesting that IBM has "embraced" our messaging so quickly, showing that it is very similar to how they speak and that IBM is comfortable with it.” — Some change, MarComms, 1-3 years
- “Feel more overlooked, feel like each thing we do is being analysed and examined.” — A lot of change, Marketing, 1-3 years
- "We suddenly moved everything to hybrid cloud and tries [sic] to put everything underneath - I understand this was the way we were going anyway but from September till now the message changed fast. We dropped and merged lots of other campaigns like Agile integration for example and reorganised teams. Also in the way we communicate on social media I feel we are less bold.” —A little change, Marketing, 3-6 years
- “Generally Marketing voice has become "quieter", meaning I hear and see less produced from Red Hat. This may be a wait and see approach on how IBM's acquisition may really affect us.” A little change, IT, 6-9 years

These observations seem to be the opposite of the first group. It could be that the

responses of the first group all come from members of the PnT organization, while this latter group has Marketing and IT. Regardless, it could be beneficial if Red Hat, when choosing how to use its voice going forward after the acquisition, chooses to let its audiences speak for it or to each other. If the audience can do the work of reassuring those nervous about Red Hat's changes, it might be more effective than a social media blitz or a PR campaign. This holds, in a way, to what I learned in Chapter 2 about the Compelling aspect of the Red Hat voice: the impetus for deciding what is compelling rests with the audience, with its appeal grounded in pathos.

**More jargon or corporate language** (8 of 40)— these responses observed that Red Hat's marketing efforts have more IT buzzwords and business jargon, like “synergy.”

- “The word 'synergy' is being used, whereas before it was on the "Shadowman would never say" list. Although maybe Shadowman has gone now.” — Some change, PnT, 1-3 years
- “I noticed a bleed of RH tone and content in an IBM ad where they used our (or some of, I can't quite remember) "Why" statement. The corporate-ness of the IBM 'sound' combined with our very RH-sounding statement did not gel well at all and felt like a violation of "Red Hat is still Red Hat". It also served to water down the punchiness of the statement.” — A little change, PnT, 1-3 years
- “Some co-branded materials and newer messaging are sliding towards more corporate speak. We have to be vigilant to keep it out, and sometimes it's very difficult.” — A little change, MarComms, 10+ years

Here, more than in any of the other observations, lies maybe the most salient change that is also the easiest to observe and understand. If your American friend of 20 years took a vacation to London and came back speaking with a slight British accent, you would notice. And you might be put off by it, because they don't “sound” like they did before and it doesn't feel authentic to them.

The same holds true here with a worry that the more jargony IBM language will start to

infiltrate Red Hat's marketing voice in a subtle erosion of the "shared values and norms that define how organizational members feel and behave" (O'Reilly and Chatman, 1996). Red Hat's brand narrative as straightforward, conversational communicators could suffer as a result of the mismatch between what it says and what its audiences perceive (Johnson, Thomson, & Jeffrey, 2015, p.11 ). Those subtle changes over time, where Red Hatters might start saying "synergy" more, could seem like a minor, inconsequential thing. But if it makes the Red Hat voice diverge from where it has been over the last 10 years, that could hurt Red Hat's credibility, if there is what Fenton and Kiefer Lee (2014) identify as "an uncomfortable difference between the company's marketing message and the customer experience. If people around the office are confused or sending conflicting messages, your public content will reflect that" (p. 80). One respondent from Marketing who has been at Red Hat 6-9 years took this question's opportunity to point out, at length, the differences between Red Hat's "About" section from 2004, 2008, 2012, and 2020. They write: "One example: the one para "About Red Hat" is so... yuck now. It feels like lists of tech buzzwords with no personality," while the 2012 version is described as "still buzzword-y, but not as bad." To this Red Hatter, the voice has been drifting away from a better version for some time now, and the IBM acquisition continues that movement. If we take what Pickard (2019) says about voice, that "culture turned outward creates our brand" and "the way that we talk, the way that we communicate, the way that we deal with each other as colleagues, ends up being the way that we deal with the world," then these changes—however subtle—represent yet another threat to the integrity and consistency of the Red Hat voice. Because if Red Hatters start *making the ask* to leverage *best-of-breed* innovations that *move the needle* on a *going-forward basis*, then Shadowman may have lost his influence for good.

## 5Cs

For each aspect of the 5Cs, more than 70% of those surveyed agree that the corporate marketing voice achieves each aspect to which it aspires. Credibility, as predicted, was rated in the results as the highest overall of the 5Cs of the brand voice guidelines, which tracks with the emphasis writers placed on it in Chapter 2. I was wrong about how Compelling would fare: I assumed that it would rank the lowest, but it actually came in second. Instead, the results showed that of the 5Cs, Concise scored the lowest. Without knowing where respondents typically see the Red Hat voice that they are assessing, it is difficult to speculate on the surprises. Not all survey respondents are internal stakeholders (we covered them at length in Chapter 2), so some of it could be from seeing Red Hat advertisements in the wild or seeing marketing messaging on redhat.com, industry event booths, and even swag available from the Cool Stuff Store.

The survey text did include the brand standards definitions of each aspect, which could impact how respondents answered as they provided the rhetorical frame through which to view them. Those definitions are:

- The way Red Hat talks to our audience is CLEAR: We're direct and truthful, we give enough context, and we don't fill messages with jargon.
- The way Red Hat talks to our audience is CONCISE: We only provide what matters, without extra filler.
- The way Red Hat talks to our audience is CONSISTENT: We adhere to our own standards, we use templates, and we maintain our company voice across channels and media.
- The way Red Hat talks to our audience is COMPELLING: We're engaging but not fake, we're inspirational but don't tell people how they should feel, and we know what will resonate with our audience.
- The way Red Hat talks to our audience is CREDIBLE: We cite sources, we don't make claims without proof, and we don't overpromise.

My interviews with Content team writers in Chapter 2 revealed that while they thought the voice is successfully Compelling, they also rated Clear at the same level. The results here do not agree, as Clear had the second lowest rating of 7.26, narrowly edging out Concise at 7.11. Authorities on company voices like Armes (2020) argue that these two aspects are the most important. Pickard (2019) argues, “You want to kind of be clear and concise first of all because there are places and times when you can be bigger. They are few and far between...So, people think of brands as having this amazing personality, whatever no, we need to be clear and concise first” (n. pag.). It seems, then, that the corporate voice could either stand to be clearer and more concise, *or* it could benefit from more internal outreach from Marketing Communications.

### **Other companies to look up to, and jargon**

In the second of three questions that included short answer options, I asked my participants if there is another IT company that has a clearly defined marketing voice that speaks to them, and what is it about the way they communicate that makes it work. Earlier in this chapter, I showed that 48 of my respondents provided an answer, that there were 28 different companies mentioned, and that those only 8 companies appeared more than once. Apple, Microsoft, Google, and Amazon/AWS topped the list. Some respondents offered comments like “No, most are terrible” or “Nothing close to Red Hat ... other companies do have particular tones but nothing I’d list as a good example.” Some respondents, like one PnT member who has been at Red Hat for more than 10 years, admire company voices closer to the earlier, edgier days of the company, “SmugMug, they are direct and authentic, reminds me of early days Red Hat.”

Several participants noted companies that are appealing because of their engaging, more conversational tone. But just sounding like a human being in marketing materials is seldom enough; readers want to read something useful as well:

- “Basecamp - I seldom use their products, but I read at least 50% of their inbox material. I like that how they talk like a small company and offer a vision that's focused on being human, rather than superhuman.” — PnT, 0-1 year
- “I can't think of any off the top of my head, but I always appreciate when tech companies talk in a lighter, friendlier, and jocular tone. However, as a tech writer with some experience with copywriting I notice some companies use too many idioms or 'in-jokes' that only native English speakers, or worse, only US-based native English speakers would 'get'. That's a mistake I think RH avoids for the most part, which is great. something to keep an eye on though.” — PnT, 1-3 years
- “I'd highlight Digital Ocean; I feel like they communicate clearly about their actual products and services without blasting me with a bunch of crap business jargon I'm uninterested in. **Nobody in IT wakes up in the morning and wants to buy a digital transformation.**” — *Marketing*, 6-9 years
- “Atlassian - more casual and more bluntly honest” — PnT, 10+ years
- “AWS and Salesforce are great - filled with personality that reinforces their brand. I know that we want to be concise with our marketing, but I feel that sometimes we lack the fun factor. It can be too to-the-point (depending on the platform/account/writer). I'd like to see us nerd out or have a little more fun, similar to AWS and Salesforce on social media. They engage with their customers/partners in a light-hearted way, without distracting from the point.” — *Marketing Communications*, 0-1 years

But what's compelling to some is annoying to others, showing yet again the difficulty of appealing to pathos when the rating is not yours to make, or when your tone doesn't match their expectations:

- “I distrust, and dislike, any company that tries to communicate in a "breezy" or "friendly" way. They are wasting my time and hiding plain facts underneath their attempts to be edgy. There is a lot to be said for the no-nonsense communication from more established technology companies such as IBM and others.” — PnT, 1-3 years
- “Pendo. Very similar to Red Hat but slightly more "jazzy" — *Marketing*, 6-9 years

- “Rapid7 clearly defines why the scenario they lay out is important and why there should be action taken.” — Sales and Services, 0-1 year

More than a few answers called out Red Hat directly by comparing it to its competitors in IT—especially in reference to the 5Cs of Red Hat’s brand guidelines:

- “AWS is far more compelling and authentic than Red Hat. They understand their customers' needs and business problems, and that is reflected in their messaging. Red Hat is increasingly fluffy and undifferentiated in our voice, particularly as Open Source is no longer a unique differentiator.” — Marketing, 10+ years
- “Google. The Google Cloud messaging is concise, credible and easy to understand (especially with tough concepts) <https://cloud.google.com/why-google-cloud/>” — PnT, 3-6 years
- “Google, AWS - Both these sites put an emphasis on clear, concise language. Everything is easy to read and follow. I feel like our language is more complicated and requires a much higher reading level. Take this page from AWS as an example: [https://aws.amazon.com/ec2/?nc2=h\\_ql\\_prod\\_fs\\_ec2](https://aws.amazon.com/ec2/?nc2=h_ql_prod_fs_ec2) . Now compare that to this page on redhat.com: <https://www.redhat.com/en/technologies/cloud-computing/cloud-suite> . AWS is clearer and easier to read.” — PnT, 3-6 years
- “Nutanix. Same message all the time. One message. Not multiple messages that overlap.” — Sales and Services, 3-6 years
- “Microsoft is very clear and distinct in its approach” — Sales and Services, 0-1 year

In this group, Red Hat loses points for not being as easy to understand as AWS or Google or Microsoft, and by not being as consistent as Nutanix. I would point out that Red Hat is three times larger than Nutanix and offers a wider portfolio of software products, but Red Hat’s other competitors here have close to 300,000 employees between them and a dizzying array of technologies for sale. For the participants who answered here, at least, it should be possible for a company to grow and mature and not lose its voice.

Nor should that voice be full of buzzwords that waste the reader's time. In the third of three questions that offered a short answer, I asked participants if there are any IT words or phrases that suffer from overuse. This represents one of the few questions that I also asked Content team writers in Chapter 2 and Red Hat Summit attendees in Chapter 4, offering us wider points of comparison (more on that in the next chapter). It stands to reason that few readers love jargon or are happy to find it in the content they're reading. But one developer's trash may be another CTO's treasure—jargon is a largely subjective judgment, as they tend to be specialized language used within groups for the benefit of some but difficult to understand and annoying if you find yourself outside that group. My college roommate is now a colonel in the Marine Corps, and over the years since we graduated his texts, emails, phone calls, and social media posts have gotten less comprehensible and more technical. It's the same with technology, or any other field, really: If you choose to use your industry's jargon as a shorthand way to signal to your reader, "Hey, I get it. You and I share the same values, and therefore you want to use language that includes us but not others."

Of the Red Hatters who took my survey, "digital transformation" was the most common example of most frequently overused buzzwords in IT marketing, with 26 mentions. A lot of the words provided can be found on the list of "Things Shadowman Would Never Say," which some respondents called out by name, like this one from Marketing Communications, at Red Hat for 10+ years: "There are many. See Shadowman's list! There are also lots of perfectly good words that get lumped in here due to incorrect use--things like cloud, edge, etc." Another participant bemoans the simplicity that came from a previous Red Hat voice:

- "Technical jargon, not really; business jargon, OMG. I understand why we pivoted towards talking about "solutions" instead of "products" but the language we use

around solutions is so disconnected from our products that I honestly can't understand what they're talking about sometimes.” — Marketing, 6-9 years

Several responses noted words that normally are fine, when used properly, but their misuse has muddied their meaning:

- “cloud, x-as-a-service are both overused. Its okay to mention the actual noun - especially when joined with a specific proper noun but everything is "as a service" now even if it isn't. This has lead to dilution of the things that actually are.” — Sales and Services, 0-1 year
- “API is often misused to describe any kind of interface between systems.” — Sales and Services, 0-1 year

And this observation, from a PnT member who has been with the company for 1-3 years, gets at one of the fundamental reasons people give for detesting jargon:

“Buzzwords are used in lieu of explaining things more simply. But that comes at a cost. What C-suite executive is going to admit they don't understand the doc that their CTO just handed them? Is the sale lost because of that, or is a poor decision made from lack of understanding, leading to an unhappy customer?”

The idea that people use big words to make themselves sound smarter is nothing new, and here, this Red Hatter invokes the idea of mismatched tone, but also hints at the fear of being outed as a fraudulent dumbdumb.

### **Summary of key findings**

Given the length and depth of this chapter, I do not want to bury what I have learned under too much information. Therefore, I am including several key findings here before closing out Chapter 3 and moving to Chapter 4. These findings are observations from a limited set of

Red Hat participants, and not a comprehensive analysis of all of Red Hat, but according to the results:

- Just under two-thirds of participants (64%) are familiar with the work that corporate marketing produces.
- More than 70% of participants agree that the corporate marketing voice effectively reflects Red Hat.
- Newer Red Hatters have a more positive view of the corporate voice than more experienced Red Hatters.
- While a majority of Red Hatters have not noticed a change in the way Red Hat sounds since the IBM acquisition, only 40% are confident that trend will continue.
- Employees who have been with the company between 3-6 years have noticed the biggest change in the way Red Hat sounds since the IBM acquisition.
- Newer Red Hatters are 3 times more likely to anticipate that the Red Hat voice will become more like IBM.
- Members of the PnT organization—who frequently assume the role of internal stakeholders who collaborate with the Content team on messaging—have a slightly lower opinion of the corporate voice than the average participant.
- Of the 5Cs in the brand voice guidelines, participants rated Credible the highest and Concise the lowest.
- The longer you stay at Red Hat the more you think the corporate voice sounds like everyone else, and you're less likely to distinguish the lack of jargon from other companies.
- Once-useful terms for technologies became vague buzzwords when they stop accurately representing the technical function of its original meaning. “Digital transformation” was the most despised.

## **Conclusion**

In this chapter, I examined how Red Hat employees feel about their company’s corporate voice and tone, especially as it relates to change resulting from IBM’s acquisition of Red Hat in

July, 2019. My analysis helped to further answer my research questions about how a corporate marketing voice can help establish notions of authenticity for employees. If I had asked 135 Red Hatters an open-ended question such as, “Tell me what words or messages are authentic to the Red Hat voice,” many might have struggled to summon applicable descriptions from scratch. But by offering examples to react to, employees have an easier time judging how they feel about each one and whether it is or is not authentic to the corporate voice. Based on the results of my survey, I showed that participants have a high overall opinion of the corporate voice, and find it especially credible. I explained how the data shows some hesitancy about the effects of IBM’s acquisition, and argued that the still-evolving nature of this rhetorical situation means that Red Hatters will need to keep revisiting their idea of what “feels authentic” to Red Hat. Finally, I offered some options for building on this study. In Chapter 4, I will continue exploring this research theme of change and Red Hat’s identity by exploring the rhetorical design and messaging choices on display at the company’s flagship marketing conference, Red Hat Summit.

## **CHAPTER 4: Authenticity and change take the stage at Red Hat Summit 2019**

In Chapters 2 and 3 I examined how different groups of Red Hatters view the rhetorical intentions, functions, and efficacy of the Red Hat corporate voice. I showed how Content team writers and Red Hatters across the company construct and measure the success of the brand voice guidelines. In this chapter, I shift focus toward Red Hat's brand identity as it was presented at Red Hat Summit 2019, the company's largest conference and its first major event after the announcement of the IBM acquisition. To show how that identity is constructed, I analyze the creative process that develops the conference theme, which takes place over several months and anchors the company's presence and focus during the conference. I show how that theme helped reinforce the corporate voice at work throughout the event—especially on the keynote stage—drawing on rhetorical criticism and work from communities, brand, and identity. I end this chapter by presenting qualitative data from Red Hat Summit attendees. I conclude that the Red Hat brand voice as presented at the conference had to adapt in the context of the IBM acquisition, reaffirming its commitment to its open source identity while accommodating and integrating IBM's role as a broader collaboration across the two companies.

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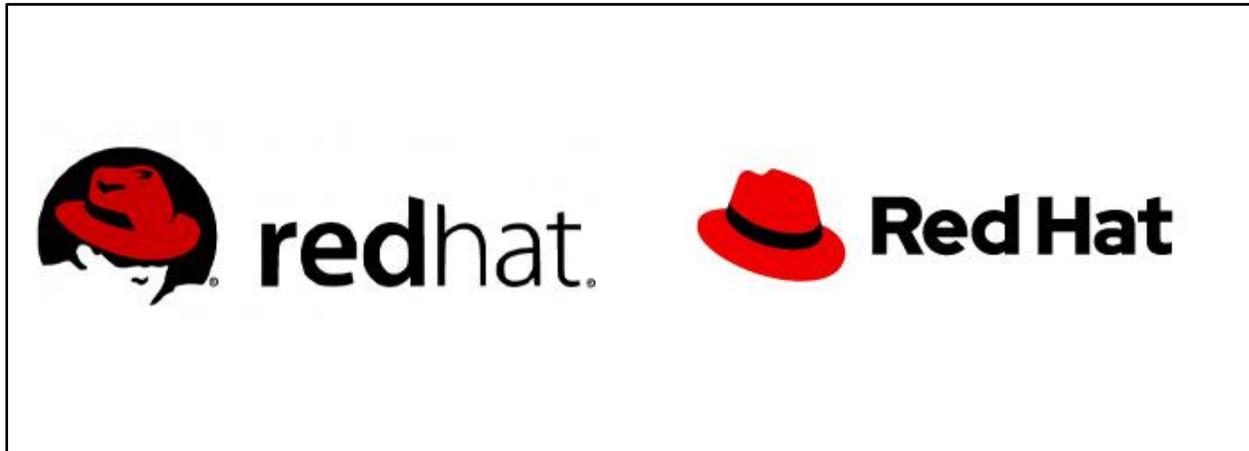
On May 8, 2019, Red Hat's Chief Marketing Officer and Executive Vice President, Tim Yeaton, walked out onto the mainstage at Red Hat Summit with a secret.

His role for the afternoon at the company's flagship marketing event of the year was to anchor a 75-minute block of general session keynotes, with speakers highlighting how open source goes beyond the code to help people in all walks of life. A crowd of about 3,000 learned how Baltimore high school students are using open source hardware and software to program

food computers to grow fresh produce in food desert, saw the winners of the Women In Open Source Awards, and watched an original song and dance number from eight Minneapolis middle school students who participated in a Red Hat-sponsored open source leadership program in 2018.

Yeaton, a familiar face at Red Hat Summit for the past few years, was there as a host for the other speakers, and to show off Red Hat's new logo and brand identity, which was unveiled the day before on the first day of Summit. He framed the process leading up to the unveiling in the language of "the open source way," which I explored in Chapter 1. In short, it is a set of principles derived from the open source development model that apply to things beyond just software. Those principles prize transparency, collaboration, rapid prototyping and iterating, meritocracy, and community, and the open source way is inextricably infused in Red Hat's strong company culture from the executive leadership on down the org chart. So, Yeaton said, the process to evolve the company's logo and brand identity—dubbed The Open Brand Project—followed those principles as well.

From the keynote stage, he explained that, for the past 19 years, Red Hatters had come to love "Shadowman," a nickname given to the human figure shrouded by the brim of a red fedora in the company's logo since 2000. Figure 4.1 shows a comparison of the old and new logo:



*Figure 4.1: On left, Red Hat's logo from 2000 - 2019. On right, Red Hat's new logo, unveiled in 2019.*

Shadowman was also a metonym of sorts to represent the Red Hat voice, even making an appearance atop the list of “Things Shadowman Would Never Say,” the lineup of egregious business jargon that the Red Hat style guide says to avoid. Shadowman speaks for Red Hat. Shadowman is Red Hat. “Back then,” said Yeaton, “the Shadowman icon was a tongue-and-cheek reflection of the way Red Hat Linux, and open source, was infiltrating the IT landscape of the 1990s.” But today, he explained, its serious design and identity problems were causing technical problems, such as how it rendered poorly on mobile devices, how the logo lockup made it difficult for some placements, and how it depicted the company name as a single word when it is actually two. But it was also causing a culture mismatch between what it conveys and what Red Hat says it stands for. “We then surveyed customers and prospects about what they thought our logo stood for, and the results were shocking—words like secretive, sinister, and sneaky predominated, which is the antithesis of our open source culture and commitment.”

It also reiterates the difference between voice and tone: voice is who you are, and tone is how you sound. As I have shown throughout this dissertation, the latter depends on the audience—which again highlights the role of collaboration—and as Red Hat’s presence in

enterprise IT grew beyond Linux, the company was making a lot of new first impressions. As I have also shown in previous chapters, Red Hat's commitment to open source is the foundation of its company culture and corporate voice, so this was indeed a problem to be perceived as anything but open. Yeaton continued, recounting the importance of Red Hat's culture to Red Hat's voice, arguing that:

For some people, and for some brands, a logo is just a logo. You see it on some swag then move on with your day. But to us, it's much, much more. It's a reflection of our identity and what Red Hat has come to mean throughout our 25-year history. It's a symbol of doing things out in the open, of leadership lessons from the Open Organization, of engaging and sharing with communities and enterprises around the world to make open source the default for technology creation and collaborative innovation for the 21st century.

And when his keynote was over, he showed off his secret: a very new and very real tattoo of the new Red Hat logo, on his upper right arm.

### **Red Hat Summit: An evolving rhetorical situation takes the stage**

Red Hat Summit (or simply "Summit") is the company's flagship and largest external marketing event, held each year in late spring or early summer. Red Hat users, customers, employees, and strategic partners join vendors, analysts and press, and open source communities to converge for three days in either San Francisco (in even years) or Boston (in odd years) to talk about all things open source and all things enterprise IT. Now in its 16th year, the event is described by its boilerplate copy on the Summit homepage<sup>13</sup> as, "[T]he premier open source technology event for thousands of IT professionals to innovate and focus on high-performing

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<sup>13</sup> [redhat.com/summit](http://redhat.com/summit)

Linux, cloud, automation and management, container, and Kubernetes technologies.” Put more simply, from the 2019 Summit FAQ<sup>14</sup> page, “Red Hat Summit is an annual IT industry event hosted by Red Hat—the world's leading provider of open source, enterprise IT solutions.”

Summit offers Red Hat the opportunity to shape its brand narrative for the coming year. Summit also represents millions of dollars of Red Hat’s potential revenue. Customers send their engineers to learn about and try new parts of the company’s software portfolio, and their IT decision makers to evaluate potential products to purchase. Attendance has grown steadily each year, and in the past six has nearly doubled, from 4,700 in 2014 to more than 8,900 in 2019.<sup>15</sup> Attendees come from many different industries, with IT Consulting & Services, Technology, Financial Services, Government, and Telecommunications representing the top five. While the conference has always been based in North America, attendees came in 2019 from 77 countries (attendees from outside of North America represented about a quarter of attendees). In 2019, 67% of attendees had not been to Summit before, while 61% of attendees were from companies that were Red Hat’s current customers. A breakdown by job role shows that the audience is primarily technical, with job titles like engineer, consultant, architect, and developer; from the business side, top attendee job roles were manager, director, and vice president.

In some ways, Summit is your typical large-scale tech event: part tradeshow, part conference, and part networking opportunity filled with keynotes, breakout sessions, technology demos, labs and training, swag, happy hours, parties, and free coffee. In other ways, Summit is unique for a tech event and authentic to Red Hat: IT nerds and business types alike from the world’s largest tech corporations mingle with total newbies and power users in upstream

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<sup>14</sup> <https://www.redhat.com/en/summit/2019/about/faq>

<sup>15</sup> According to <https://www.redhat.com/en/blog/red-hat-summit-2014-raises-bar> and <https://www.redhat.com/en/summit/2019/sponsors/why-sponsor>

communities, and a demonstrated love for open source pervades everything from the building marquee to the conference mainstage to irreverent t-shirts worn by attendees in line for the restroom, and all throughout the event.

The conference obviously represents multiple opportunities for Red Hat. Each year the attendance beats the year before, but it still doesn't come close to attracting the biggest crowds in the tech industry. Red Hat competitors/partners VMware and Cisco brought in 20,000 and 30,000, respectively, for their flagship conferences in 2019. Those are overshadowed by comparison to Amazon's annual AWS re:Invent, which garnered more than 65,000 in 2019, and even *that* was small compared to Mobile World Congress in Barcelona, which attracted more than 109,000 in 2019. Red Hat has a booth presence at each of these events, and at dozens and hundreds of other conferences and trade shows throughout the year, but with this kind of competition, a company of Red Hat's size can struggle to stand out by numbers alone.

Naturally, then, Red Hat uses Summit to grab the focus of the IT industry for a few days, and a lot rides on the effective execution of the corporate marketing voice. Red Hat can make big announcements, such as major product launches and updates, new partnerships, and new open source community developments that will get press coverage in tech media outlets and spawn user-generated conversations on social media and in user forums like Slashdot or Stack Overflow. Everything that Red Hat says during Summit—as well as leading up to it and after—tells us about the construction of its corporate marketing voice, to whom Red Hat is targeting with its marketing messages, and how it wants the world to hear it. But there can exist a wide gulf between intention and reception. As I explored in Chapter 2 and Chapter 3, it's not always a simple matter of what you say and how you say it. It's also what the audience hears. As with marketing so it is with rhetoric—both require a deep and continuous dedication to knowing your

audience well enough to match the right tone to the right person at the right time.

For an example of that tone missing the mark at Red Hat Summit, I can draw from personal experience to illustrate the importance of executing the right marketing decisions. In late June of 2016, Summit returned to the Moscone Center in San Francisco, located in the northeast part of the city by the Yerba Buena Gardens. The Moscone Center is a popular choice for Big Tech conferences and trade shows, and Red Hat had used it once before in 2014. For Summit 2016, Red Hat chose to purchase the advertising space on the exterior wall of the Metreon, a large shopping center directly across from the Moscone Center and highly visible to Summit attendees. The advertising space comprises five enormous square billboards in a single row, each forty feet by forty feet. It's a big, bold space to make big, bold statements, perfect for Red Hat's nascent portfolio awareness advertising campaign. That campaign had just begun in January, designed to amplify other key technologies in Red Hat's software portfolio (e.g., cloud computing platforms, application integration, security, and infrastructure management) beyond its flagship Red Hat Enterprise Linux operating system. The portfolio awareness team—of which I was a part, in addition to my Summit duties—was tasked with creating ads that took advantage of the size and location of these billboards to ingrain the idea of Red Hat's broad portfolio in the minds of Red Hat Summit attendees.

With less than a month to create and execute brand-new creative assets for these billboards, the team threw out a wide range of ideas. We keyed in on ads that we thought were compelling and clever but just short of snarky. For the integration ad, I played on a crowd/cloud pun with a headline that read, "Three's a cloud: Apps. Data. Devices." For security, we used "More eyes. Fewer bugs." and paired the headline with a drawing of 22 eyes all staring at an eye-shaped bug in the center of the image. My favorite execution was for the management ad, which

featured a dashboard interface of knobs, levers, sliders, and gauges paired with a headline that read, “Control all the bleeps and bloops from one place.” Fun, catchy, and memorable, right? I and our small creative certainly thought so. Our internal stakeholders and approvers felt...differently.

In our first round of creative review, we heard, “This is not the straightforward voice of our campaign. I can't even imagine showing [stakeholder] an ad with “bleeps” and “bloops” in it. Let's please not try to be too clever. Our customers at Summit don't want cheeky and cute, they want serious solutions to bet their careers on.” They disagreed that the ads would be compelling for the right reasons, disagreed that they would be celebrated for being fun and clever, and disagreed that they struck the right tone. And they were absolutely right. There are certainly opportunities at each Red Hat Summit to lean on the lighthearted, fun, and clever parts of the corporate marketing voice (e.g., swag, at the party, and on the expo floor), but the debut of a new campaign on a billboard for mixed audiences to see without the additional context we needed was not it. Successfully applying different tones of the corporate voice means picking your moments when your audience is ready for them, as Pickard (2019) reminds us:

In a world where everything is human, or pretending to be human, people increasingly need to feel seen. Every experience has these cadences, these moments of emotional connection. And those are the moments that really count. Those are the moments where people learn to identify with you, because you're identifying with them. Where they can choose to push you away or hold you closer.

Here again we see the need for marketers to understand the rhetorical importance of audience, style, and *kairos*, which I explore more fully in this chapter.

Red Hat uses Summit to bolster existing subscriptions and land new accounts, to show a strong portfolio of software and finances to satisfy analysts and Wall Street, to show off

innovative technologies to its core audience of self-professed IT geeks, and to celebrate the brand and its open source ethos. For my purposes here, though, I will focus on how Red Hat uses Summit to frame its corporate marketing voice when a big tech audience is listening—with a lot on the line.

### **The rhetorical situation: what was at stake in 2019**

Red Hat Summit 2019 presented the company with an unprecedented situation for its corporate voice to address. For the first time in nearly 20 years, the company had a new logo and brand system, and was in the process of being absorbed into one of the largest IT companies in existence. Gone were the rowdy startup days of Shadowman and his courage to disrupt the status quo. Here were the days of an established, mature corporation about to be purchased in the largest software acquisition in history. Red Hat's ethos as an open source company that worked with everyone was in danger of being radically changed with the IBM acquisition, and many feared that the updated logo was related to that, or at the very least feared that it meant Red Hat was selling out and going corporate. Red Hat Summit 2019 was the company's chance to make big, bold statements of its steadfast commitment to the open source ideals that made it Red Hat while laying out a vision for the future of that commitment and the company.

To understand those actions, it is helpful here, I think, to draw on established concepts in rhetorical criticism to frame this unique challenge for the corporate voice to address. I summarized the debate around the “rhetorical situation” and its nuanced definitions in Chapter 1, so I will not repeat that here in full. Bitzer's (1968) view, in brief, is that what makes a situation rhetorical is 1) an audience capable of being persuaded, 2) an exigence that functions as the organizing principle of a situation, and 3) the constraints of that situation—circumstances a person might face beyond their control. For Bitzer, the situation is an objective thing that exists,

and you respond to it. Challenging that view in 1973, Vatz argued that the rhetorical situation is not a fixed “thing” that you respond to, nor is it objective; you choose which parts of a situation to engage with, leaving out others, and in the act of doing so you subjectively define the situation for others.

Long-running disagreements in rhetorical scholarship aside, Jasinski (2001) says that rhetors “need to create a particular understanding of the world, or some part of it, that can be shared with the audience. They need to render the world, or some part of it, intelligible or understandable; they have to make confusing or troubling events meaningful for their audience” (p. 517). For Red Hat, that meant hosting its annual marketing event with all the expected trappings, activities, and messages about being the leader in enterprise open source, but doing so by striking the right reassuring tone of authenticity and independence. To understand how Red Hat attempted to meet this challenge, I will turn to the creative development of the Summit theme in 2019.

### **Variations on a theme: Summit’s creative development**

Each Summit comes with its own bespoke, carefully crafted conference theme. A tremendous amount of creative and executional effort gets poured into theme development each year, between graphic design, animation design, creative strategy, copywriting, keynote writing, onsite signage, promotional marketing efforts for registration, public relations, and session topic selection. The event represents the single largest collective effort of communicating the Red Hat corporate voice and tone to the world. Every member of the Marketing Communications department works on Summit in some capacity; some employees spend 12 months of the year prioritizing, if not devoting, their time for it. Long before each year’s actual event, Summit creative teams focus on ensuring that year’s conference theme anchors the attendee experience

and speaks to Red Hat's point of view within enterprise open source. Past themes have included titles like "Ideas Worth Exploring" (2018), "The Power of Participation" (2016), and "Energize Your Enterprise" (2015), to name a few. The theme is infused throughout all aspects of Summit, from executive keynotes to the exposition hall to registration campaigns leading up to the event to onsite parties to social media during and well past the conference and more.

So why bother creating a new theme from scratch each year at all? Several other IT companies, particularly the larger ones, stay consistent with their conference theme design and primary messaging from year to year. Microsoft Ignite, AWS re:Invent, and Google I/O are all examples of companies with this approach to their flagship conferences. But enterprises like these have the advantage of an established brand recognition that Red Hat does not. Each year might be the first year that someone learns about Red Hat through Summit, so that first impression must be carefully crafted to reflect the company's open source values and how those are applied to the changing tech landscape. And each Summit theme anchors the attendee experience while at Summit and reinforces key messages and emotions.

What makes for a compelling, memorable theme? Think of the conferences you have been to, and which ones stood out. It is difficult to recall the exact theme titles of conferences I have attended, but easy to remember which conferences made a lasting impact on my career and the ones that expanded my perspective on the world. The same holds true for Red Hat Summit and how successfully the theme connects the many experiences attendees will see and be a part of. For example, it was more important in 2016 that attendees realized how interconnected open source communities, projects, products, companies, and contributors are, and that each group plays a crucial role, than it was for an attendee to name "The Power of Participation" correctly. A theme creates an experience. A theme represents Red Hat. A theme offers a chance to see how

well attendees connect the creative team responsible for creating and executing the Red Hat voice at Summit.

Summit also creates another mode of collaboration around brand identity in its role as an opportunity for Red Hat to collect audience feedback on brand voice and tone, which can inform future Summit themes as well as product and marketing refinement. Multiple Red Hat teams conduct research at Summit every year to better understand their audience—and how to talk to them. Web and UX teams recruit attendees to offer feedback about redhat.com through card-sorting exercises and other activities. Product and technical teams create technology demos for users to try. Breakout session and keynote organizers collect feedback through the Red Hat Summit event mobile application to gauge how popular certain topics and technologies are, and whether the Red Hat customers on stage during general session were relevant to the wide and diverse range of industries, expertise levels, and job roles present in the crowd.

### **What went into creating Red Hat Summit 2019**

I now move from the abstract idea of conference themes to the concrete example of “Red Hat Summit 2019: Expand Your Possibilities.” I show how Red Hat’s creative teams create a Summit theme, why this Summit theme was different in more than the usual respects from years prior, and demonstrate how the theme contributed to Red Hat’s responses to its audience and unique rhetorical situation. At each step, the theme development highlights how Red Hat sees itself as representing the core tenets of its commitment to open source—even when that commitment was being called into question by an acquisition that threatened to upend the very identity of the company and its brand.

The theme creation process for this event began in July, two months after Red Hat Summit 2018 concluded, and ran through November, one month after the IBM news broke.

Internal creative teams moved from theme creation to conference development and registration promotion leading up to the event on May 7-9, 2019. Though thousands of Red Hatters across the company contribute to bringing Summit to life each year, and thousands more participate, the creative theme work comes from a small, dedicated team of designers, writers, creative strategists, and project managers. A core team keeps the progress moving throughout, adding more people for more perspectives as needed, and integrates key ideas from executive and senior leadership to establish the must-haves for this year's theme. For example, the planned launch of Red Hat Enterprise Linux 8, the company's flagship product, was a priority for 2019, as well as updated messaging on open hybrid cloud, one of the marketing strategies that has been consistently featured on the Summit mainstage in the latter half of the decade. In a two-day workshop, potential areas of the theme are introduced, debated, refined, debated again, and refined again into a working collection of avenues to explore.

Teams work from a creative brief, drafted by Creative Strategists after a comprehensive analysis of successes and challenges from the previous Summit. The need to update messaging from year to year is a given, but this explanation, from the Red Hat Summit 2019 creative brief, contextualizes the need for a new conference theme each year by beginning with one very basic question: "What is the problem we are trying to solve here?"

#### A SHARED MESSAGE

Every year, Red Hat Summit gets an updated design and message, and it's always more than just a new set of clothes. It's a unique statement that only we can make, about open source and our shared belief system.

"Shared" is an important word here. This statement isn't shouted at our attendees – it is inclusive of them. As much as it is about Red Hat, it is about them, the attendees, the people who make it happen.

## A THEME THAT FEELS BOTH FAMILIAR AND FRESH

To be truly inclusive, creative development for this theme requires exploring concepts that feel both familiar and fresh.

Familiar because Red Hat's values are timeless: current events and passing trends don't interest us as much as how open source can impact them. Familiar gives the regulars something they recognize and already believe in, and gives rookies a solid sense of who we are.

Fresh because the IT world is in constant flux, and our brand must be seen as responding to or even anticipating change. Fresh gives us a new sense of what's possible, and gives everyone a new rallying cry for their experience before, during and after Summit 2018.

The brief goes into finer details about things like attendance goals, persona-specific data from years past, sales and marketing goals for 2019, and that "We want to convince customers that Red Hat Summit is a can't-miss event experience so they continue to return year after year." The brief includes a question on how Red Hat wants its audiences to feel about coming to Summit, including:

- Energized
- Inspired
- Happy to be there
- Excited to part of it
- That they are contributing
- That they are doing something good for humanity (philanthropy, open source stories)
- Partnership
- Empowered to go back to their office and make a difference, make changes
- That they had a memorable experience

These are familiar goals for attendees of many conferences; the differentiator for Red Hat is the emphasis on open source as a higher calling, which it wants its attendees to identify with,

not just by looking *at* the theme design and messaging, but by looking *through* it to feel a part of Red Hat's company culture expanded to include the experience of being at the conference. That culture, as Red Hat CEO Jim Whitehurst would say<sup>16</sup> in an interview during day two of Summit, is "hyper-optimized for collaboration and co-creation, whether that's upstream with our open source communities or downstream with our customers or with our employees, and that's great and let's celebrate that for what it is."

Keep in mind, this was three months before IBM announced its intentions to acquire Red Hat and before the Open Brand Project had finalized its modernized logo design, so the two biggest contributing circumstances for Red Hat's unique rhetorical situation had not been introduced or accounted for yet. Over the course of the next year, the event theme manifests into something attendees feel represented in, care about, and engage with throughout the attendee journey (see defining points below). The experience of the theme facilitates a personal connection among attendees, between attendees and Red Hat, and between attendees and Red Hat Summit.

The full theme development process changes every year but generally takes around five months. Creative strategists start by drafting two initial theme "territories"—that is, high-level, general directions, relevant to Red Hat, to shape messaging and visuals. For the 2019 Summit theme, these territories started out as "Build your future on open source" and "Turn ideas into reality." From there, the Summit working team expanded those two territories into four after an intensive two-day workshop, adding "AND" and "Play creates results" to the first two.

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<sup>16</sup> theCUBE. Jim Whitehurst, Red Hat | Red Hat Summit 2019. <https://www.youtube.com/watch?v=DPi7wo5ex0o>

## OUR STARTING POINT

### Build your future on open source

Change is certain. How you prepare for it is critical. Summit is where you (your company, your career, your community, your goals) create the optimal foundation and get ready for anything on the horizon. Only at Summit can you experience *how* your peers do this.

Open source technologies form the solid foundation for the unexpected, because while you can't plan for everything, Summit can prepare you for anything.

**This theme will be about adaptation, a career canvas, with tools, participatory**

### Turn ideas into reality

Ideas are worth exploring, but they don't make a difference unless they are acted upon. Doing matters. Doing invites participation, builds new and better ideas, and celebrates incremental wins. Doers are courageous, and Summit/open source is a safe place for doing, where you have a place/community to get shit done.

Dreams need doers. An idea is better when shared, and best when brought to life. Summit is for opening yourself to possibilities, and for making ideas work.

**This theme will be making-centric, discovery-based, active, results-based, surprising, productive**



## OUR STARTING POINT

### “And (&)”

*And* is the essence of open source. *And* connects ideas and gives them stability. *And* joins elements and people that might not otherwise meet. With *And*, we can access new places, build new things, join new communities, add, tinker, hack, and open new possibilities. *And* not only defines our flagship offering (“RHEL and...”), it defines Summit and our reason for being.

Summit is the intersection of thoughts and action, a place to build on what you have, build toward what you want, and build up your expectations of possibilities to come.

**This theme will be rich – creative and “conceptual”, about connections, very open source**

### Play is essential

The freedom to play is the essence of open source. It's fun, but Summit reframes it as vital to innovation and success. When we learn, network and experience Summit, we are free to play, and with this freedom we connect, explore, produce, and learn as much about yourself as you do about tech. <<?

Play is productive. It creates a safe environment to experiment and fail—to try in earnest and in fun—to create results, *together*.

**This theme will be experiential, different, idealistic**

Figures 4.2 & 4.3: Broad theme territories for Red Hat Summit 2019

From these four territories, the team explored different and contrasting areas of each territory, producing 14 total different theme concepts (which the team calls “buckets”). For example, a theme concept under the “Play” territory was “A place to try,” which emphasized the

importance of building a culture and technological infrastructure that empowers IT employees to explore new ideas and innovations without fear of failing. Buckets expand and contract, some folding into others because they were not strong enough, creatively speaking, to resonate with the team (and, eventually, the intended audience at the conference). However, they were retained because of the value of the concept to the creative development of the Summit user experience. This left the team with eight theme concept contenders, which were then quantitatively scored by the team on a simple scale of 1-5 with seven descriptive benchmarks:

- Relevant
  - Does it speak to industry trends?
  - Does it connect to sales conversations?
- Exciting
  - Is it inspiring? Does it spark fun ideas?
  - Is it memorable?"
- Practical
  - Does it speak to usefulness?
  - Does the theme tell attendees they'll get actionable information?
- Implementable
  - Can we easily develop a design system, messaging guide, and user experience with it?
- Enduring
  - Can we use it throughout the year?
  - Does it infuse well with other Red Hat projects (e.g., Command Line Heroes or Portfolio Awareness)?
- Universal
  - Does it extend to Forums, Executive Exchange, and ancillary events like Analyst Day?
  - Does it speak to multiple cultures, modes of learning, and personas?
- Unique to Red Hat

- Is it ownable?
- Would this theme be hard for other tech companies to use at a conference?

Summit 2019 | theme territory bucket scorecard ☆

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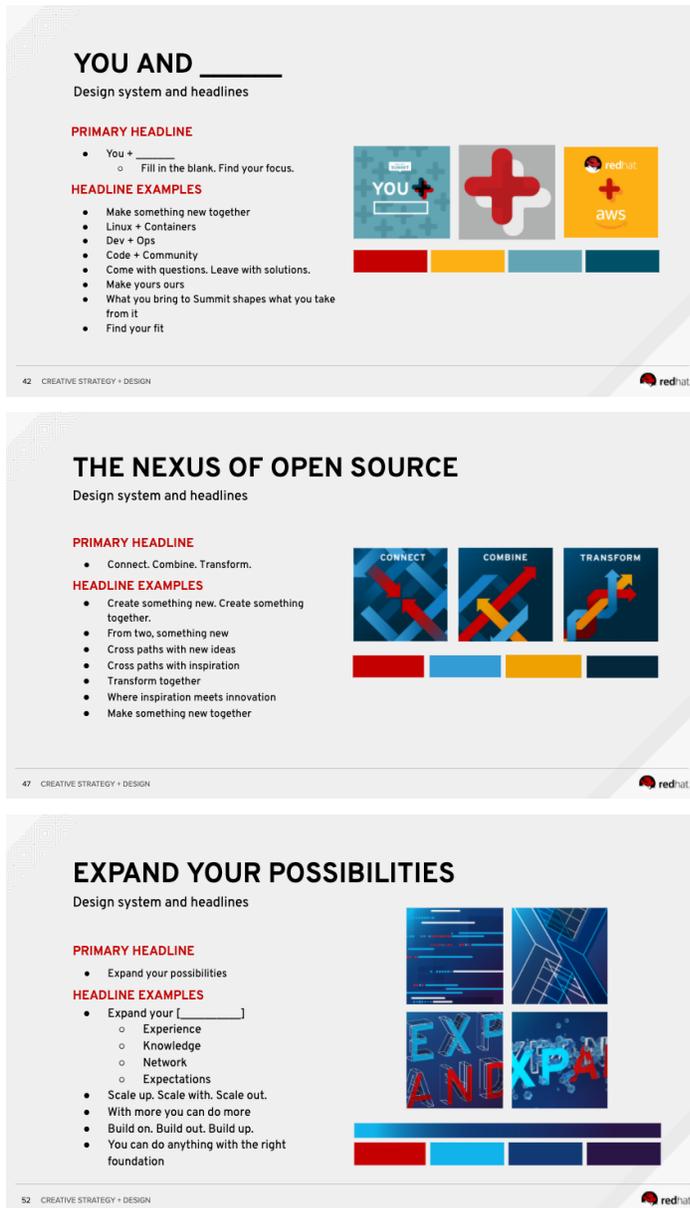
	A	B	C	D	E	F	G	H	I
1		2	3	6	4	5	1	7	
2		Start with a solid foundation	Expect the best, prepare for anything; Plan for the future you want	Make the most of what you have	Make it work optimally / add to improve / customize	Serendipitous breakthroughs	AND: celebrate, imagine	Play creates results	
3	<b>Relevant</b> --Does it speak to industry trends? --Does it connect to sales conversations?	4.43	4.29	3.71	4.14	2.57	4.14	2.85	
4	<b>Exciting</b> --Is it inspiring? Does it spark fun ideas? --Is it memorable?	2.14	2.71	1.99	2.85	3.85	4.85	4.43	
5	<b>Practical</b> --Does it speak to usefulness? --Does the theme tell attendees they'll get actionable information?	4.71	4.43	4.43	4.57	3.71	4.14	2.85	
6	<b>Implementable</b> --Can we easily develop a design system, messaging guide, and user experience with it?	4	3.63	2.85	3.71	4.28	4.85	3.57	
7	<b>Enduring</b> --Can we use it throughout the year? --Does it infuse well with other Red Hat projects (e.g., Command Line Heroes or Portfolio Awareness?)	4.14	4.57	3.71	3.86	3.29	4.86	3.28	
8	<b>Universal</b> --Does it extend to Forums, Executive Exchange, and ancillary events like Analyst Day? --Does it speak to multiple cultures, modes of learning, and personas?	4.16	4.5	4	4.16	3.3	5	3	
9	<b>Unique to Red Hat</b> --Is it ownable? --Would this theme be hard for other tech companies to use at a conference?	3	2.28	2.85	2.57	2.86	3.99	3.14	
10		26.58	26.41	23.54	25.86	23.86	31.83	23.12	
11									
12									
13	Green cell is highest score in that theme bucket	3.33	2.33	3.16	2.5	3	4.16	3.33	
14	Red cell is lowest score in that theme bucket	6	6	6	6	6	6	6	
15		1	2	1	3	2	3	2	
16		7	7	7	7	7	7	7	
17		3.00	2.28	2.85	2.57	2.86	3.99	3.14	

Figure 4.4: Internal creative team's ratings of each possible Summit theme

The results of this scorecard helped determine which theme possibilities were promising, which needed work to get up to par, and which should be discarded or folded into another. Those eight became four as they were condensed into a presentation to director-level stakeholders within Marketing Communications. That audience chose “AND; celebrate, imagine,” at which point the Summit team explored extensions of that concept for further refinement. Different elements of the simple concept of AND were extended into three directions, which all pulled from the same anthem-style copy overview, to create: AND is personal and unique; AND

changes and transforms; AND expands and adds.

After several weeks of iteration and prototypes on both design and messaging, the team presented to the vice president of Marketing Communications to choose a final theme for Summit 2019. Three options were presented:



Figures 4.5, 4.6, & 4.7: Final theme options for Red Hat Summit 2019

The third option, “Expand Your Possibilities,” was chosen. At this point, specific

applications of theme copy and design were built out into a comprehensive system flexible enough to be used in everything from email banner headers to executive keynotes to onsite directional signage to session titles to t-shirt options. The theme was also adapted for specific audiences, such as executives, developers, regions around the world, and ancillary events. The creative team behind the theme process then began to pivot into promotion mode, infusing the Summit theme into hundreds of design assets, ads, and marketing materials.

### ***Expand Your Possibilities***

The externally facing abstract of the conference theme, featured prominently on the Summit homepage, sets the tone for attendees well before they ever set foot in the convention center. It gives Red Hat the opportunity to frame the focus of that year's conference messaging, reinforcing key ideas that speak to the company's technology and culture that will be on display throughout the event. The abstract starts as an internal anthem to anchor and inspire the creative development of the event's marketing, as discussed. It gets edited for the event's messaging guide, and then again for the Summit homepage. The abstract for 2019's theme of "Expand Your Possibilities" from the messaging guide reads:

#### *Expand Your Possibilities*

Whether you've been in IT for decades or you're just starting out, you know you're in an industry that doesn't stand still. And neither can you—every pull request accepted, every project finished, every strategy executed is an opportunity to add to your experience and expand your possibilities.

What you do with those opportunities, however, depends on a simple little word and how you treat it: *AND*. Because from the right foundation, from an open foundation, *AND* connects technology with culture and expands your possibilities. It adapts and grows with you from the start—it's interoperable, adjustable, elastic, scaling up with you when you

need it or down when you don't. Think Linux *AND* containers. Think public *AND* private cloud. Think Red Hat *AND* you.

*AND* is the essential building block of open source, and Red Hat Summit is where *AND* comes to life, where ideas worth exploring become reality. It's a place to learn, network, and experience open source. It's the connection of inspiration and action, to build on what you have, build toward what you want, and build up your expectations of possibilities to come.

The version that appears on the Summit homepage<sup>17</sup> is written more intentionally for the attendee as the audience, and not a broader group that would include Red Hat employees:

What to expect

Red Hat Summit is a collaborative forum, a place to expand your possibilities. This year, we're thinking about *AND*.

*AND* is about scaling your technology and culture in whatever size or direction you need, when you need to, with what you actually need—not a bunch of bulky add-ons. From the right foundation—an open foundation—*AND* adapts with you. It's interoperable, adjustable, elastic. Think Linux *AND* containers. Think public *AND* private cloud. Think Red Hat *AND* you.

Red Hat Summit is where *AND* comes to life, where ideas become reality. Event sessions will cover advances in technology, IT processes, and culture trends—things that help organizations expand their possibilities.

Note the subtle changes in the opening line, establishing Summit as a community meeting place grounded in the principles of open source (“collaborative forum”). Style changes shift from poetic to practical in the second paragraph, explicitly highlighting technical benefits associated

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<sup>17</sup> <https://www.redhat.com/en/summit/2019/about>

with open source software (“interoperable, adjustable, elastic”) personalizable for the imagined attendee. Both versions name IT topics the industry cared about at the time that were also a major plank of Red Hat’s The final paragraph continues down the practical path while mentioning technology and culture—the twin sides of Red Hat’s conception of open source that doesn’t succeed without both.

### A big blue spanner in the works

What happens to outward projections of Red Hat’s culture when a new and unexpected existential threat appears? The weeks following the IBM announcement found Red Hatters adjusting on the fly to new challenges set in front of them, trying as best they could to continue business as usual despite the uncertainty they experienced. Among my own notes from that time period, I had written “We don’t know that there will be a Red Hat Summit next year, or even a Red Hat, or even jobs for us.” Until anyone told the creative teams otherwise, Summit was still happening and the theme work was still needed—albeit with some adjustments.

This slide (Figure 4.8), from the theme options development deck presented in early October 2018, showed potential visual applications of “Expand Your Possibilities”:

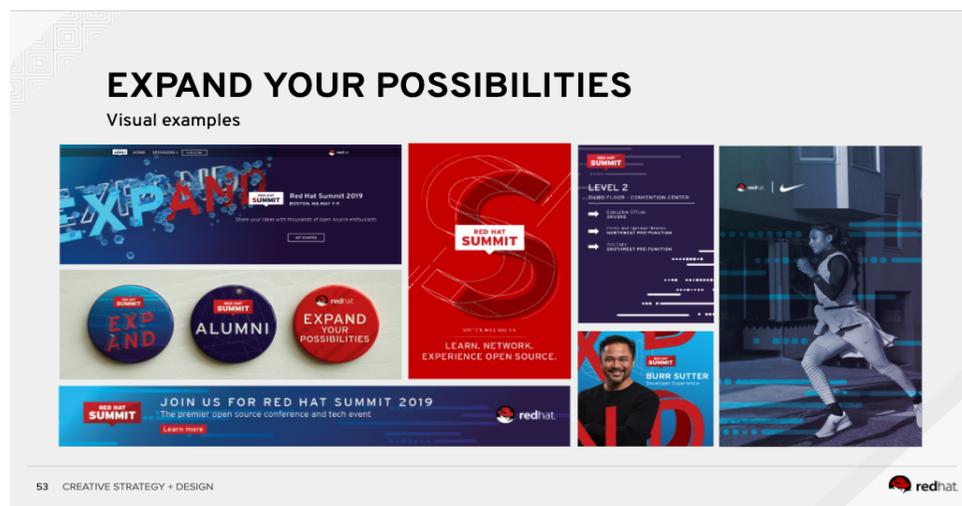


Figure 4.8: *Expand Your Possibilities* theme before IBM acquisition news

The heavy use of Red Hat’s secondary color palette made for a visually compelling and balanced design system, seen here spanning examples of homepage headers, customer features, directional signage, and banner ads. Contrast that with this slide, taken from the Summit design guidelines shared with internal teams and external agencies to ensure design consistency:



Figure 4.9: *Expand Your Possibilities* theme after IBM acquisition news

Between conception in development and actual application during the event, something changed: With an uncertain future about the company’s direction and what Red Hat might look like in 2020 and beyond, decisions were made to double down on red, and infuse it throughout the theme applications to really put the Red Hat in Red Hat Summit. Blues were removed to avoid the association with the iconically blue IBM, and purples were removed to avoid the implication of the two companies blending together. Given that red is the main color in Red Hat’s brand system, it would follow that red would feature prominently in the company’s marketing events. But a look back at the evolution of Red Hat Summit themes since 2005

thwarts that assumption, as Figure 4.10 shows:

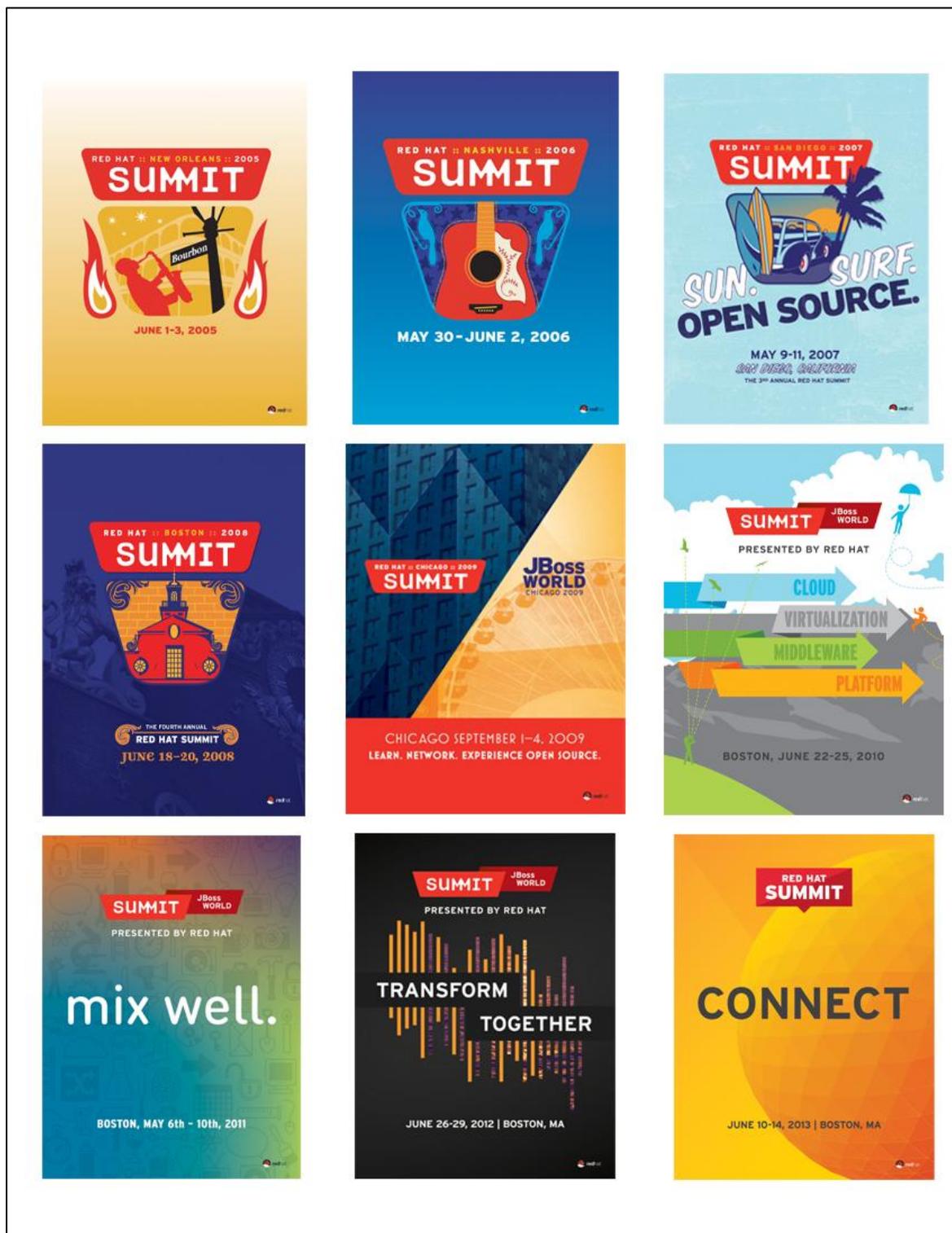


Figure 4.10: Key art from the first nine Red Hat Summits



*Figure 4.11: Key art from six of the last seven Red Hat Summits*

Key art posters from each year of Summit show the evolution of theme design over the last 15 years and the gradual attempt to work toward consistent representation of the brand's design guidelines. They also reveal a telling part of the creative team's response to the shifting rhetorical situation of the IBM saga. The first seven years are bright and colorful, variegated and unique, and the first five integrate the host city's identity in some way until Boston and San Francisco became the consistent destinations. The first Red Hat Summit logo was present from 2005 to 2012, and a new one was introduced from 2013 to 2018, when the creative teams attempted to incorporate more consistent elements. Theme designs from the past several years make use of Red Hat's secondary color palette, heavy on blues and teals to contrast the red. Even

the design for Summit 2020, seen in the bottom right hand corner of the figure above, makes use of sharp, complementary shades for lines to zigzag across a field of open whitespace. Red Hat's primary logo is tucked in the bottom right corner of every year through 2018. That new logo first appeared on 2019's poster, seen here in Figure 4.12:



*Figure 4.12: Key art for Red Hat Summit 2019*

Compare the other 15 years of Summit theme design to 2019, and what stands out? It is red. *Very* red. The kind of red meant to emphatically convey the company's ongoing commitment to its core values through the bold display of the core element of its brand identity. There are no complementary colors in shades of teal or blue or purple, as in years past. To

include those would be to fuel the fires of criticism, speculation, uncertainty, and doubt among audiences critical of the acquisition and skeptical that Red Hat could retain its identity and independence after being swallowed up by a much bigger IT company. This performative reassurance was on display throughout the event, and dovetailed with the other significant action to transform Red Hat's existing brand identity: The Open Brand Project.

### **“New hat. Same soul.”**

I will return briefly to the discussion of the logo redesign—the Open Brand Project—that began this chapter, to show how it aimed to set expectations that even though Red Hat has a new look, the brand still reflects the core of the company's ethos—it's just more “authentic” to where Red Hat is now, the company would argue. The Brand team used Red Hat Summit 2019 to debut<sup>18</sup> the new logo and brand identity, the results of more than 15 months of research, iterative design, feedback, and revision. The new logo itself was kept under wraps until the event to avoid circulating it without the accompanying context. But Red Hat's marketing teams still had to promote Summit beforehand, so all design materials with the company's logo were split by a date, May 1: before that date, any marketing materials appearing with a Red Hat logo were to use the old one, and after that date, the new one. The nature of printing logistics and environmental event design meant that both logos were visible throughout the week. Red Hat's identity—its legacy and future—held in tension, on display for attendees.

The Open Brand Project started in early 2017, when internal design and brand teams partnered with industry creatives to begin the process of modernizing the Red Hat brand identity. One blogger (Bicheno, May 8, 2019) captured the importance of the project, writing “As

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<sup>18</sup> <https://www.redhat.com/en/blog/new-look-same-red-hat-so-what-did-we-change>

arguably the best-known company to be named after an item of clothing, the hat itself is central to Red Hat's brand and image, so any decision to muck about with it, therefore, is not to be taken lightly." The team solicited survey responses from more than 1,200 responses from technology, marketing, design, and branding professionals—including a feedback booth at Red Hat Summit 2018— focusing on the most important elements they chose (in short: it needs a hat, and the hat needs to be red), and created and iterated on hundreds of options, soliciting more feedback and input as the project advanced. The team also responded to the literally thousands of messages from Red Hatters on internal email lists, expressing their strong and strongly held opinions about what the new logo should look like (including a large group of people who didn't want the logo to change at all). All of this was done, in Red Hat's language, the open source way.

The modernized brand roll-out was accompanied by numerous digital marketing assets that Red Hat featured on its homepage and through social media channels. One video, for example, was a thirty-second spot set to bouncy pop instrumentals. It opens on a black screen with the old logo in the center. Bits of that design get picked apart or tossed away until just the hat remains, slightly different from the original. Five seconds in, the hat becomes a time travel portal, splicing in old black-and-white video of mainframes from the early days of computing before situating the hat in space, then against a field of red, then used as a layer mask over some of the most prominent projects from Red Hat's Marketing Communications team, and a dizzying array of other backgrounds, activities, and environments. Halfway through, and we see the new logo, alone against a white background. Text flies in and reads "New hat. Same \_\_\_\_\_," where the blank is a slot-machine style reel spinning and pausing on the words *vision*, then *promise*, then *heart*, *freedom*, *culture*, *openness*, and *story*, before finally ending on "New hat. Same soul."

The argument, to me at least, is clear: Yes, Red Hat is changing, but only cosmetically, and everything that went into making it the company it is today will continue to tomorrow and beyond. This is an example of one common scenario persuaders face, as outlined by Jasinsky (2001) in regards to the rhetorical situation. When they must restore public confidence in an institution or authority figure, they might face a situation in which “large numbers of people believe that they have lost control of their lives. The advocate’s task is to restore meaning and hope, making people believe that things will turn out okay in the long run” (p. 520). This may have worked for employees who felt that Red Hat was losing what made it special, like some of the respondents to my survey in Chapter 4. By itself, the efforts to persuade employees and customers that they can expect the same Red Hat they know may have had an easier challenge, but when combined with the IBM acquisition, it likely made it harder not to conflate the two in the minds of the audience.

More specific details about the Open Brand Project were included in several posts on Red Hat’s official blog the week before Summit, one written by the Brand team detailing the specific technical reasons for the change and another authored by Yeaton (Red Hat’s CMO) explaining why the process started and how it better represents Red Hat’s modern brand. The Brand team’s post<sup>19</sup> features a .gif file of the old logo morphing into the new, and begins:

Symbols are important. People care about them.

Their power comes from the number of people who can look at them and take away more or less the same idea. Sometimes that’s just a name. But sometimes there is more; a story, shared values, a common purpose, a way to be.

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<sup>19</sup> <https://www.redhat.com/en/blog/new-look-same-red-hat-so-what-did-we-change>

The Red Hat logo is changing for the first time in 19 years. And our challenge, while easy to describe, is thorny. How to preserve the recognizability and reputation (and meaning) of our last mark, while creating something fresh, new and easier to work with.

So, then, how do you make design changes that resonate with the past, seize the current day and position you properly for the next 20 years?

The post acknowledges the exigence of design-driven difficulties—and goes on to explain them—but the thrust of the post is more about finding a way to preserve everything Red Hat says it has come to be known for while preparing for a new era of the brand, the company, and the voice. Internal email chatter had plenty to say about whether that effort succeeded, and a survey of media coverage from the unveiling could also likely show what external opinions of this argument were like. But either way, the updated design changes came with a sacrifice. Shadowman had to go:

Where is the shadowy guy?

Without a doubt, this was the thorniest of issues. Shadowman, as our previous logo was affectionately known, is a character. Red Hatters understood what he stood for - the fight to level the technology playing field with open source - and rallied around him. (Anthropologists would have had a field day observing our attachment to him. Even referring to him as a real person!) But outside of Red Hat and those unfamiliar with us, took Shadowman at face value. He looked sinister, not as a symbol of openness and transparency. We needed to come out of the shadows.

Shadowman was our symbol for nearly two decades, but the hat—the red hat— is the original and core symbol of the company. When we surveyed Red Hatters and our community, they told us the same thing. The hat was what mattered, not who was wearing it. Using a fedora alone as our logo also helped us solve a lot of problems that

made the old logo frustrating to use—it’s simpler, so it works in tiny spaces (like favicons). It’s also easy to infer the name of our company—Red Hat—so we can use the hat on its own in more places. And without the face under the hat, it’s easier to add text and build a full logo system.

Perhaps not all Red Hatters understood what Shadowman stood for, as the results of my survey in Chapter 3 hinted at. But the Brand team’s post covered as many technical design details as it could in a single blog post (they even made the red...redder<sup>20</sup>) and linked out to the project’s website<sup>21</sup> for the truly curious to read on.

Yeaton’s post linked out to the Brand team’s to cover the technical details so he could frame the exigencies for Red Hat to address. Certainly, when the Chief Marketing Officer of a large corporation writes on behalf of that company, we are to understand that he represents its corporate voice. In that post<sup>22</sup>, he shared the results of those surveys the team solicited for feedback, “and some of the responses were alarming, to say the least.” He continued:

*Sinister. Secretive. Evil. Sneaky.* These respondents might not have known anything about Red Hat, but they did believe that man lurking in the shadows didn’t immediately inspire their trust. In their survey responses, they wondered who he was and what he was doing in the logo.

The Brand team and I were heartbroken. These words couldn’t have been further from my deeply held impressions of Red Hat, which I’d formed well before joining the company. I’ve worked in open source for nearly 40 years, and since the 1990’s Red Hat has been an inspiration to me.

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<sup>20</sup> A paragraph near the bottom of the post explains: The “classic” Red Hat red (PMS 1797, or #CC0000) failed contrast ratio checks on dark backgrounds, which means that it was difficult or nearly impossible to read for readers with no or limited visual acuity, but it could also cause eye strain for sighted viewers. So we’ve evolved our red to a lighter, brighter shade (PMS 1788C, or #EE0000) that keeps the spirit of the original.

<sup>21</sup> <https://www.redhat.com/en/about/our-brand/open-brand-project>

<sup>22</sup> <https://www.redhat.com/en/blog/announcing-next-evolution-our-red-fedora-mark>

For decades, Red Hat has been a flag bearer for the commercial open source movement, and open source startups have looked to Red Hat as a beacon, a guiding light illuminating a new (and now, I would argue, an undoubtedly better) way to build enterprise software. Red Hat has always been the champion of the "open source way": open, collaborative and inclusive community innovation. Yet our iconic logo—including the partially veiled, fedora-wearing "Shadowman," as we Red Hatters affectionately call him—wasn't squaring with the values we firmly believed the logo stands for.

The tone and style of the post is certainly epideictic, and perhaps encomium, as he continues. Invoking emotions and “feelings” of authenticity are an appeal to *pathos*, and they attempt to center the purpose of the change back on the audience:

What's most important to me is the feeling the new logo sparks in those who encounter it. The new logo reflects Red Hat's evolution—from a scrappy upstart "sneaking" into data centers with boxed copies of a Linux-based operating system (not to mention mugs and t-shirts) to the world's leading provider of open source solutions for enterprise hybrid cloud environments, someone working daily with the largest companies and agencies in the world to develop and run mission-critical solutions. We've truly stepped out of the shadows.

Citing the company's growth and maturity situates the need for a brand system that can represent that evolution.

When people who haven't yet heard of Red Hat see the new logo, I want them to associate it with an innovative hybrid cloud company rooted in the power and trustworthiness of Linux—a company expertly capable of working alongside them to tackle technology challenges with a broad portfolio of solutions, a valued and trusted partner.

And yet...I want existing customers, partners and open source communities who see it **to feel a comfortable familiarity**. I want them to smile and say, “**That feels like Red**

**Hat.**” In our bolder, more modern logo, they'll instantly recognize all the things they've told us they expect from us: a culture of openness, a spirit of co-creation, a willingness to share knowledge, a dedication to enabling others (not just selling to them), and a commitment to catalyzing communities capable of solving the world's biggest technology challenges.

That's what the red fedora will always represent—today, tomorrow and as Red Hat enters the next quarter century of its revolutionary history. [emphasis mine]

The post concludes as it begins, centering the focus of the project on the audience, reiterates the emotional appeal, and touches on the very heart of this entire dissertation research. How does someone know what is and is not *authentic* to a company's voice? How is it measured? How is it defined and demarcated? “What **feels** like Red Hat?” is the question guiding this writing, and to see it as a priority from Red Hat's CMO reinforces the centrality of this question to the company's marketing efforts and culture.

Any mention of IBM is noticeably absent from his post or the Brand team's or any language surrounding the Open Brand Project whatsoever. This was, almost certainly, by design; the project was well underway before anyone caught wind of the proposed acquisition, and the team's long and labored work to modernize the brand would understandably want to distance itself from conspiracies that the two plans were in cahoots. In both cases, the Red Hat voice was being used to define the company's rhetorical situation, which Jasinski (2001) identifies as one of the basic needs facing rhetors, “to render the world, or some part of it, intelligible and understandable; they have to make confusing or troubling events meaningful for their audience” (p. 517). and to persuade audiences—external and internal alike—that in spite of whatever major disruptions that happen, Red Hat will retain everything that makes it Red Hat and its integrity as an open source institution will remain intact Jasinski calls this function of a rhetorical situation

*reaffirmation*, explaining, “Institutions and authority figures face the problem of reaffirmation: as the value of an institution or authority figure declines, advocates struggle to restore audiences’ faith and confidence” in them” (p. 520). The arguments made around the logo redesign project leaned heavily on reaffirmation, and will be repeated throughout the conference in countless ways, but perhaps none with higher stakes than on the keynote mainstage. And just as the design teams had to capture the essence of the old logo and save its significance going forward, so too did Red Hat CEO Jim Whitehurst have to persuade attendees that the company would preserve its essence and significance going forward, through the upcoming IBM acquisition.

### **Executive keynotes: Red Hat, meet Big Blue**

At the end of the first night of Red Hat Summit 2019, the company announced the general availability of Red Hat Enterprise Linux 8, the first major update of its flagship product five years in the making. On the general session stage, executives celebrated the release with champagne, streamers, and confetti cannons, and brought dozens of engineers who worked on the project up to celebrate together. Shortly before that, the mainstage also saw 1-on-1 conversations between Whitehurst and Ginni Rometty, IBM’s CEO, and between Whitehurst and Microsoft CEO Satya Nadella. Both guests were heads of two of the biggest companies and rivals in IT, sitting down in friendly conversation with the biggest company in open source. The three CEOs brought different constructions of character with them. Nadella had turned Microsoft around to embrace open source and partner with Red Hat, so the audience extended him a certain degree of trust based on his demonstrated acts of commitment. Whitehurst had led Red Hat for 11 years at that point, growing and evolving the plucky open source rebel into an established, trusted guide in enterprise open source. One of the co-hosts from theCUBE, a Silicon Valley interview show about enterprise tech media with a heavy presence at industry events, said “I

wrote right after the announcement of the acquisition, Red Hat, the one thing that they've actually built themselves for is to deal with the massive amounts of change.”

Change also came to (and from) Microsoft, which had historically been rabidly against open source software. In 2001, its CEO said “Linux is a cancer that attaches itself in an intellectual property sense to everything it touches” (Kingsley-Hughes, 2019). In the last several years, Microsoft has shifted its position considerably in the past few years to go all in on open source. Appearing onstage at the leading/largest open source event in IT was clearly part of that repositioning, and a welcomed one; it meant that the software “wars” between the open source development model and the proprietary development model were over, and open source had prevailed. As Paul Cormier, Red Hat’s longtime President of Technologies, said in an interview on day two of the conference:

The Microsoft arrangement. As you guys probably well know, we weren’t the best of friends 5, 6, 7 years ago, but Satya said it on stage the other night: Our customers got us together. Literally, we had a set of big customers that almost took us in a room and said ‘You guys need to talk,’ and frankly I think they’re one of our best partners right now. I’m not sure it could have happened without Satya, but they’re one of our best partners because we’re both interested in satisfying our customers.<sup>23</sup>

Once again, the interests of Red Hat are couched in the interests of its customers, continuing the rhetorical strategy of change for the sake of others, and not the company itself.

Rometty found herself in a more adversarial position with the audience, not just because her company was set to take over the conference host’s. Rometty took over as CEO of IBM in 2012. A Silicon Valley analyst writing for Forbes in 2014 summarized IBM’s reputation problem up to that point:

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<sup>23</sup> [https://www.youtube.com/watch?v=pRXbXK9\\_U-c](https://www.youtube.com/watch?v=pRXbXK9_U-c)

IBM is hemorrhaging talent on a global scale across all divisions. It cannot retain good people. IBMers, as they call themselves, are underpaid, neglected, and have been abused for years. Most of IBM's 400,000+ employees are no longer working for the company. Their jobs have become nightmares. They are prevented from doing good work. They know IBM is neglecting its customers, but they are powerless to do anything. The best they can do is to try to survive until reason returns to IBM's leadership, if ever....

IBM's workforce is operating in survival mode. They have no voice, no means to make IBM better, and they are certainly not going to stick their necks out. IBM is squandering its greatest resource and most of its best minds. Most of IBM's businesses are declining. As business declines IBM cuts staff. Quality and services get worse and business declines even more. Execution gets worse. Every day customers trust and respect IBM less. They buy less. IBM needs to break this cycle of insanity. They need to start treating their employees better and mobilize them to save the company.

The acquisition of Red Hat was, according to Vaughan-Nichols (May 16, 2019), "a make or break decision for IBM. This is the single biggest technology deal in history. While IBM has stopped its decline in revenues, it's still losing market share to its rivals such as Google, Microsoft and Amazon Web Services (AWS)." To stay competitive, this acquisition had to go differently than the company's usual approach in the past. As Vaughan-Nichols put it, "IBM's top brass knows it can't do that by just 'buying' Red Hat. It has to, as one IBM executive put it, 'Let Red Hat be Red Hat.'" Cormier hammered on that point in an interview with Vaughan-Nichols as well, saying "IBM absolutely understands Red Hat must stay separate. I'll give an example. You would not see Satya Nadella on stage here if he thought that IBM/Red Hat was going to compete with him. We're going to have to continue to partner [with other companies]." This reinforces Red Hat's carefully crafted ethos as a neutral, trusted guide in IT that collaborates with its competition in the spirit and basis of open source.

So, on stage on the first night, attendees watched a preview of the soon-to-be finalized

acquisition, as one CEO welcomed another to sit down for a casual Q&A (at least as it was framed). Their combined persuasive goal was to reassure Red Hat audiences—both internal and external—that the authenticity of the Red Hat they know and love wouldn't be going anywhere after the acquisition is complete. Their situation, though unique to both Red Hat and IBM, is familiar to rhetoric. Jasinski (2001) lays out common scenarios of rhetorical situations in which rhetors might find themselves. Establish and/or rehabilitate the advocate's ethos is one. Restoring public confidence in an institution or authority figure is another. A third is when people need to hold a community together. "Advocates face the challenge not only of constituting group identity but also of maintaining or reinforcing group identity" (p. 518). We shall see all three at work in the CEO Q&A, which followed Whitehurst's keynote speech.

Whitehurst embraced Rometty in a symbolic hug as the IBM CEO walked onstage, signaling to the Red Hat crowd that "she's one of us" and part of the community. The two sat down, chairs facing the audience but angled toward each other. Situating the audience as the primary listeners was inclusively important, an attempt to make this not a back-and-forth between corporate leaders but a conversation everyone could be in on. Whitehurst began by saying, "I think most the audience knows but I think it'd be great to hear a little bit more about IBM's history with open source and commitment over the last 20 years." The very foundation of Red Hat's culture is *also* important to the soon-to-be parent company, he seemed to say. This persuasion, as Garsten (2006) argues, is

worthwhile because it requires us to pay attention to our fellow citizens and to display a certain respect for their points of view and their judgments. The effort to persuade requires us to engage with others wherever they stand and to begin our argument there, as opposed to simply asserting that they would adopt our opinion if they were more reasonable. (p. 3)

Rometty recognized this need to engage her audience where they stood, and not from her perspective on high as CEO. Before she answered Whitehurst's first question, she established familiarity with the audience by joking about a line from his keynote about history. "Do you really give a history lesson every year?" she asked, letting the audience cheer on behalf of their leader and his personal quirks. Here, she earned roaring applause with the crowd for spontaneity and casual conversation, batting down the formal expectations of composure and pomp. That spontaneity is an important part of moving adversarial audiences toward the speaker's cause. Audiences value sincerity in a speaker, and Miller (2010) argues that "spontaneity affects the trustworthiness of statements, and sincerity affects our trust in the speaker; in this way spontaneity produces sincerity (or, to be more precise, the impression of spontaneity produces an impression of sincerity)" (p. 23). It might seem overblown to analyze a few seconds of impromptu joking at this level of detail, but with everything at stake for this interaction, everything can carry weight. And as Miller (2010), argues, one of the most powerful and consistent themes throughout rhetoric's history is its "own enduring impulse toward self-denial. Here, rhetoric seeks not to 'flourish' or to 'reign,' but to disappear, to get out of the way....The motto for this impulse is that the art of rhetoric lies in concealing the art: *ars est artem celare*" (p. 20). Skilled speakers appear sincere by not appearing overly rehearsed, such that whether their spontaneity is genuine or not, the "rhetorical concealment" of the tools used to appear that way benefit the persuader.

Whitehurst framed the conversation early as one of partnership and shared interest in open source. "We've been working together over 20 years and I think some people forget that and how early IBM invested in open source and saw that opportunity," he said. Rometty recalled IBM's early efforts in the 1970s before saying, "to Jim's point," which was important, as she

shifted her oratory away from the single listener onstage to speak to the audience, but without drawing attention to the shift. She continued, “it was ‘98 Apache [an open source software program IBM used to build its WebSphere Application Server] and then it was ‘99, so when he says we invested in Linux and in Red Hat, it was a billion dollars. And in ‘99, that was a lot of money.”

Whitehurst interjected, “I mean, that’s still a lot of money today.” Rometty quickly countered, “So is \$34 billion,” referring to the price of the acquisition. Whitehurst laughed, the audience laughed and clapped and whistled, and the two joked about it being “a great deal” and “a bargain!” Their conversation in the first two minutes did a lot of work to put the audience at ease and start to move them from their skeptical, distrustful, even adversarial position against IBM. “Those roots are deep between the two of us,” she said, mentioning that both companies have shared beliefs in the power of the upstream community ecosystem. “I have really come to appreciate two big things: one is the importance of open governance, which is just vital to open source, and the second piece is around if you’re going to take, you have to give,” arguing that IBM has tried to instill the latter especially in its company culture in the last few decades.

“Why now? Why Red Hat? What did you see in open source that said well now it’s important to not just partner in this but to actually be the leader in open source?” Whitehurst asked. “First, to you and the team and over its long history, I mean you have built a wonderful company and, maybe even more important a wonderful culture, a wonderful culture about open,” at which point she had to pause for uproarious applause. Whitehurst asked Rometty how she sees the two cultures “working together, coming together?”

“*Working* together is the right word. *Coming* together is not necessarily the way I would describe it....Jim and I have talked...” here, again, she addressed the crowd instead of her

counterpart. “This was one of the most important things...to preserve what open source is and the value of it. Part of what binds us is the same mission. We are on a mission to scale open source, right? That’s a good place to start from when you talk about two cultures. But the next thing...Jim and I have both agreed that Red Hat should stay an independent unit, now—” and here, the conversation paused to allow for the biggest applause break yet. Rometty explained the benefits of this independence—Red Hat can serve as a platform “that invites innovation from everyone, so you want to have it built on open source, built on open standards...and our clients can count on that.”

Here, too, she seemed to acknowledge what analysts and critics have been saying, that the acquisition is a make-or-break for her company, and they have more on the line than Red Hat:

The other side of this is that then IBM will change, right? It’s easier for me to change and to change IBM, and that so much of what Red Hat does, we’ll build on top of that...I couldn’t be more happy about the acquisition of Red Hat...We know the job they do for our clients in the room. I am extremely respectful of preserving that. I always say to Jim it’s not like I have a death wish over 34 billion dollars—I am not buying them to destroy them by any stretch—I want them to be successful!

More applause.

The crowd listened to this conversation between CEOs, a rhetorical performance intended to calm the fears of those who thought Red Hat would lose its...Red Hattiness. Jim spoke directly to Ginni. Ginni spoke to the audience, both in the conference crowd on hand and to the press, to analysts, to Wall Street, to Red Hatters watching the livestream, and to the broader open source community. The conversation ended as it began, with a ceremonial embrace, perhaps symbolically meant to signal unity-by-independence. Whether that intent worked or not would

remain to be seen well after the event—as the results of my study in Chapter 3 seemed to indicate, many still remain unsure about the integrity of the Red Hat voice going forward. But while I could not gauge reactions to the keynote performance, I could gather feedback from attendees on the efficacy of the corporate voice and Summit theme. I will turn now, finally, to a small study I conducted with Red Hat Summit 2019 attendees. While it may not be comprehensive, it does provide anecdotal examples of the rhetorical situation I have framed throughout this chapter.

### **Assessing what attendees think of/at Red Hat Summit**

In this section, I describe the study I conducted onsite, interviewing and surveying Summit attendees to collect feedback and their opinions of the Red Hat voice. In some ways, this study was two years in the making: I first began researching what Summit attendees think of the Red Hat voice at the conference in 2017. I stood near a booth in the expo hall and asked random passersby if they wanted to help make Red Hat sound better. It was a piecemeal approach, done in between other, more pressing responsibilities at the event, but it was progress toward my goal of discovering whether Red Hat sounds to its audiences the way it says it sounds, and gave me the kernel of a more involved study to conduct in 2019. I presented the goals and context for the study to participants as an activity to help narrow the gap between how Red Hat talks to them and how they want Red Hat to talk to them, with this prompt:

Every tech company could do a better job of talking to you about your job, your challenges, your choices, and what you actually need vs. what you're being told. We appreciate your feedback today to help us improve our communication and make our conversations more useful (and less painful!) for everyone.

Primarily, I wanted to understand how well the Expand Your Possibilities theme

resonated with attendees and what they think of the Red Hat voice more broadly. To accomplish this, I structured my survey (see Appendix C for full survey) in five separate sections:

1. About you — Participants were identified solely by job role, were asked why they came to Summit, and asked to identify anything during the conference that really resonated with them.
2. Theme — Participants were asked how relevant, exciting, and unique they thought the Expand Your Possibilities theme was.
3. Red Hat's communication style — Participants were asked to rate, on a scale of 0-10, how well the Red Hat voice lives up to the 5Cs of its brand guidelines.
4. You and Red Hat — Participants were asked to assess Red Hat's tone in its marketing materials, specifically concerning explaining complex terminology in clear ways, using less jargon when compared to other IT companies, communicating with a useful level of technical detail, and how unique Red Hat's voice is in the IT industry.
5. Nonsense and fluff — Participants were asked to identify any jargon or buzzwords that have become meaningless from overuse.

### **Participant selection**

Initially, I had hoped to recruit hundreds of survey participants through the Red Hat Summit event mobile application. Although it is not mandatory to download the app to attend the conference, several thousand attendees download the app to help them navigate the week's events and find the most relevant content for their experience and goals. The app also functions as a useful feedback tool for the Red Hat employees who organize and execute Red Hat Summit, as it gives attendees the opportunity to rate the relevance and usefulness of breakout sessions and training labs, general session keynotes, and other event experiences. Additionally, the app is used as a research tool to learn how well Red Hat's intended messages connect with its audiences. I

was unsuccessful in my attempts<sup>24</sup> to include my questions in the app, so instead I focused on in-person interviews, for which I sought and obtained IRB approval for human subjects research from NC State University.

I knew in-person interviews meant the total number of responses would be more limited—there is only so much free time to be found at a conference when you have other duties—but this also meant I could shift my expectations to having fewer participants but to go deeper in my understanding of why they answered the way they answered. I designed a new interview survey—one that could be administered as an in-person interview or, if the opportunity arose, digitally on a laptop, phone, or tablet—secured new approval from the IRB office at NCSU, and blocked my schedule at Summit as best I could in anticipation of executing my research plan.

I arrived in Boston two days before the start of Red Hat Summit 2019, on May 5. My primary responsibilities for this year were to rehearse keynotes with Red Hat executives and customers and to walk the space at the Boston Convention and Exhibition Center to check each sign for accuracy. Once free to conduct my research, I went to the Feedback Zone booth with my clipboard and sought out willing volunteers to participate in my study over the time I had to conduct it in the first block of time I had. As attendees walked up to the booth, I and other Red Hat researchers greeted them and explained what the purpose of the booth was and what activities they could participate in. I included a brief description of my study alongside the other

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<sup>24</sup> My initial research proposal to the IRB office at NCSU had included the app as a significant feature of the study, and I hoped to gather hundreds of responses over the three days of the conference. I also planned to interview 15-30 attendees for 20-30 minutes each, which would have offered qualitative support to my quantitative data set. Interviews were to take place within the conference expo hall, at a Red Hat booth called “The Feedback Zone,” dedicated to gathering UX, product, and brand input from attendees. This was the context in which I was hoping to add my research questions, but I was not successful in persuading the Red Hat Events team to add my questions to the app survey mix. As I understand it, there were already a lot of research questions planned for the app, and the team did not want to run the risk of giving attendees what might be called “feedback fatigue.”

opportunities. For the attendees who were interested, I explained what the survey was for, what would be expected of them during it, and asked if they would be interested in talking through some of their answers after they finished.

After four hours, I had conducted nine interviews, and my onsite responsibilities pulled me away from the expo hall for the day. I learned that some participants wanted to talk through the interview document with me, while others wanted to answer in silence. The opportunities afforded by the former helped me round out the data I gathered with follow-up explanations and anecdotes, but I worried that the rate I was going was not going to be sufficient to establish a significant data pool from which to draw generalizable results. I expressed those frustrations in the staff room set aside for creative teams onsite to produce videos, update websites, tweak keynotes, and respond to opportunities as they arise. One of the UX developers conducting user research studies in the Feedback Zone mentioned that he had gathered all the responses he needed on day one, and offered to include my survey alongside his team's, on the iPads in the booth. I was grateful for the opportunity to bolster my efforts and converted my in-person interview worksheet to a self-guided Google Form for attendees to engage. For the next two days, I spent time in the Feedback Zone when I could and performed my other onsite duties as needed, all the while collecting detailed, self-guided survey responses through the tablets in the booth.

I discarded one response because it was incomplete—the participant filled out two questions—and another because the answers indicated to me that English was a significant barrier to understanding the instructions and purpose of the survey. In total, I gathered 46 completed surveys, 30 from tablets in the Feedback Zone and 16 in-person interviews.

## Results of my survey and interviews

**Why did attendees come to Red Hat Summit 2019?** Many respondents mentioned coming to learn more about specific technologies or products (e.g., automation, “OpenShift strategy,” and “seeing where Kubernetes is heading”), which is in line with answers from the vendor attendee survey. Others mentioned networking opportunities, or coming to see their own customers featured in sessions and keynotes. Some mentioned the access they get on site that they can’t get anywhere else. As one developer put it, “At Summit I get to talk to the experts in-person instead of wading through FAQs.” Three participants explicitly mentioned the IBM acquisition as a motivation to attend in 2019:

- “I want to see how Red Hat does things at Summit, and this is the last year before the IBM acquisition.”
- “I want to see how Red Hat is before the IBM acquisition”
- “I want to see how Red Hat handles its last Summit. Branding was overwhelming and clearly took over the convention center”

These responses anecdotally reinforce the idea that people were unsure about what would happen to Red Hat after IBM.

**What did participants find compelling?** Predictably for an IT conference with a majority of attendees in technical roles, learning about new technologies was a common response. But the answers indicate that the big moments of impact on the keynote stage did not go unnoticed, and neither did the extra theme emphasis on the company’s core identity through environmental design. “I loved seeing Jim Whitehurst on the same stage as the CEOs of Microsoft and IBM,” said one, and “Very red. It felt like the Oscars. The RHEL 8 party on stage was a big moment,” said another. “Wednesday morning demo was great and really impressive. Love the new logo,” came one response, and “nothing struck a chord yet but branding wise you

blew it out.” One response, from a network engineer, stood out for the broad story they sort of told:

Open culture. You’re productizing the things the communities make—turning their creations into services. I learned in high school on Linux—now you’re doing machine learning and what Chris was talking about. His keynote connected with me. I love learning How Things Work. I want to learn how the cloud really works. How OpenStack really works.

That comment was a nod of sorts to the long history of open source that Red Hat’s executives consistently emphasized on the keynote stage. Another reminded internal teams that while this may be just another year of theme design and execution for them, it can mean something more compelling to attendees, writing that they noticed “puppies and swing and interactive art. marquee outside. first impression was huge and great. a guy outside said he wanted me to take his picture in front of the Red Hat Summit sign so he could send it to his coworkers and family back in India.”

But not everyone had the same positive impression. One systems administrator’s answer stood out in particular to me because it clearly called out the artifices of marketing. They wrote, “I see that your communications embody what you’re trying to do. I get it. There were keynotes and signage and keynotes about signage...the marketing was excessive -- overkill. And a little fluffy. Messages should be solving tech problems.” This is in the same vein as Miller’s “rhetorical concealment” from earlier in the chapter. She argues, “the principle of rhetorical concealment is more than the everyday dissimulation of intentions: it is the conviction that the means by which intentions are concealed must also remain undetectable,” (p. 20). This attendee felt the extra effort spent on calling attention to the Open Brand Project and the emphasis on the red in Red Hat were unhelpful to them. Similarly, another participant said that what stood out to

them, writing “Cloud-native app dev sessions. The keynotes were pretty but too generic. The demo was awesome.” Any marketing that someone can readily identify as marketing, then, can work against its own goals. Miller identifies this rhetorical theme as *suspicion*, which “appears in the passage by Aristotle quoted earlier: artifice is not persuasive, because it makes people suspect ‘someone plotting against them.’ We treat the intentions of others as plots against us in a zero-sum game: if you win, I lose. You are likely to be trying to cheat me out of something, to deceive me, so I must be suspicious,” (p. 23). This participant, who said they see all of the marketing fluff and don’t need it—they just want “useful” info—demonstrates again how marketing and rhetoric are two elixirs drawn from the same well. I suspect that most people wouldn’t readily say they enjoy being marketed to, and indeed may claim that advertising doesn’t work on them; what they are saying, in Miller’s perspective, is that for messages that they deem useful and relevant to them (Compelling, for the 5Cs), they don’t identify that as marketing; that is just good communication.

### What did attendees think of the theme?

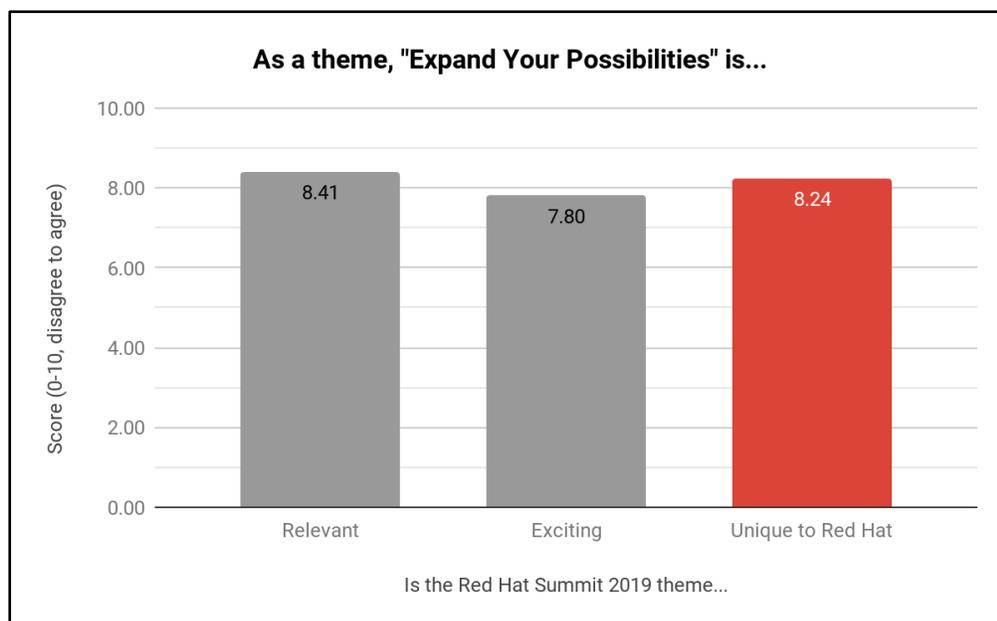


Figure 4.13: Summit attendees’ rating of the 2019 theme

On average the participants in my study gave the theme high marks across the board, as a group. “Strong foundation is a helpful concept,” one explained. Another said, “It is in line with where I want to take my IT career at this point in my life” and “I feel the theme is important because it inspires us to always keep reaching, innovating, and working together.” Admittedly, these answers did not add much in the way of interpreting the scores, but one participant thought it was a “Great theme to align with the new acquisition.” The keynote with IBM and Red Hat CEOs was the first night of the conference, so all of these answers would have come after that. Perhaps the Q&A helped frame people’s experience as they participated in the rest of the conference, and perhaps featuring IBM first helped Red Hat to frame the rest of the theme content and messaging successfully for attendees.

**How successfully does Red Hat communicate with attendees in general?** Attendees at Red Hat Summit 2019 gave higher scores to Red Hat for living up to the aspirational 5Cs of the brand voice guidelines, compared to the Red Hatters who answered the same questions in Chapter 3. Figure 4.14 shows the opinions about the 5Cs of Summit attendees in my survey:

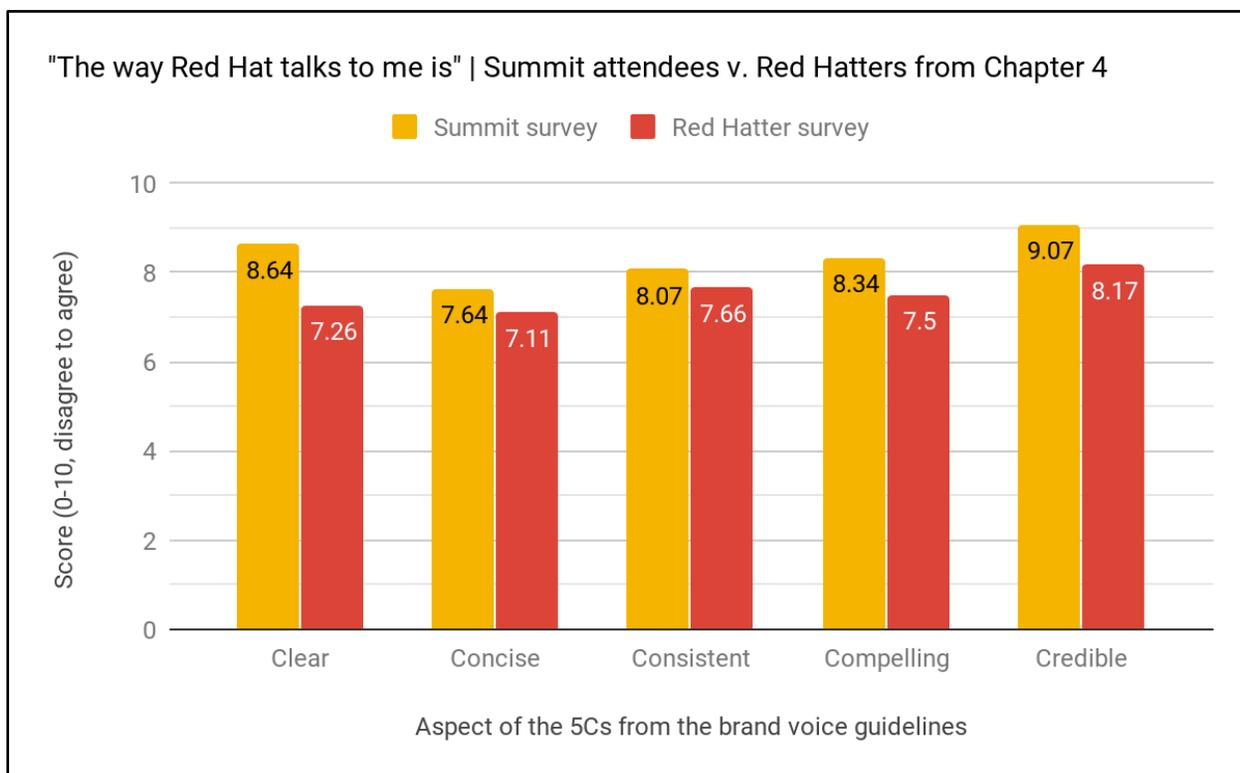


Figure 4.14: Summit attendees' opinions of the 5Cs of the brand voice guidelines

The biggest gap between Summit attendees and Red Hatters is for how Clear the Red Hat voice is. The context of being at Red Hat's biggest conference almost certainly contributes to that. A conference pass is more than \$1,000, so it follows that anyone willing to pay that cost is there to learn or advance their career in some way. Summit 2019 offered more than 200 breakout sessions, with plenty of opportunities to learn how to use new technologies or modify organizational culture. The context of being in proximity to Red Hat employees while taking the survey could account for higher numbers as well—perhaps attendees scored the 5Cs higher to avoid an honest but uncomfortable conversation about how the host company isn't doing its best. But one thing is clear, at least: every group I asked to rate Red Hat's voice according to the 5Cs gave the highest score to Credible. The lengths to which the Content team goes to ensure claims aren't made in marketing materials without the evidence to support them seem to be paying off.

**How did attendees feel about how Red Hat talks to them in particular?** Attendees

were asked to rate four questions on a scale of 0-10, with 0 being *Completely Disagree* and 10 being *Completely Agree*.

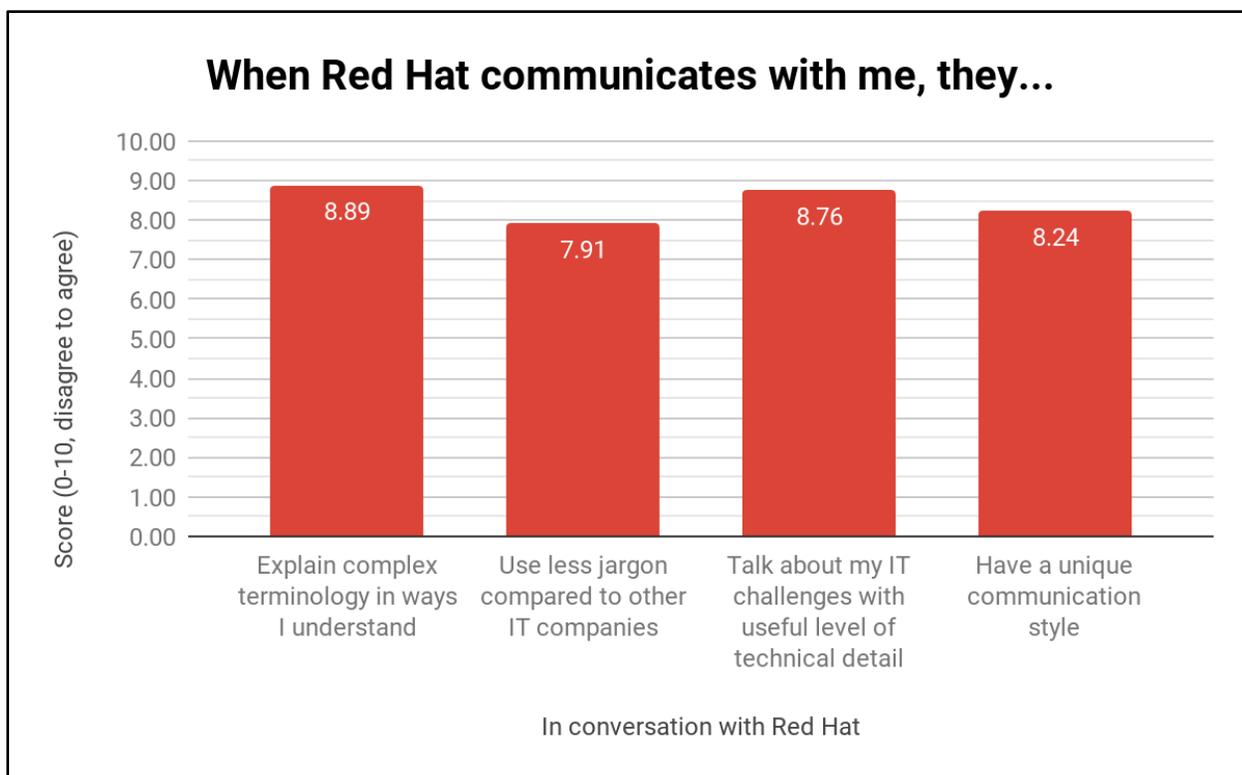


Figure 4.15: Summit attendees' assessments of the way Red Hat communicates with them

Participants again gave high marks across the board. And again, I would attribute the context in which these questions were answered as at least one contributing reason. The entire Summit experience is deliberately crafted to appeal in different ways to different audiences, and if the conference organizers do their job well, each attendee can feel they found the useful information they were looking for in a format they wanted. In other words, it is unrealistic (or perhaps just unhelpful) to separate these answers from Summit and consider them as evaluations without significant bias.

**What IT terms or phrases did attendees consider meaningless from overuse?** With such a small study population of 46 participants, it is difficult to point to dominant trends about

language in the IT industry.



Figure 4.16: The most frequently cited buzzwords that Summit attendees consider meaningless

That said, the top two answers for unnecessary jargon or buzzwords were consistent with the top two buzzwords from the Red Hatter survey in Chapter 3. It appears Red Hat and other technology companies would do well to avoid saying “digital transformation” when discussing the concepts of it; in other words, marketers will yet again need to employ the tools and strategies of rhetorical concealment.

## Conclusion

In this chapter, I examined applications of the unique circumstances of the rhetorical situation, outlined by Jasinski (2001), and presented at Red Hat Summit during a critical point in the company’s growth and evolution. I discussed how that threatened to change the core tenets of its well-defined corporate voice, grounded in Red Hat’s commitment to the open source way. I showed how the conference theme was crafted to create a framework of openness, collaboration, and flexibility to respond to change, and I analyzed how those features were used by executives on the keynote stage to reassure a nervous, skeptical audience that not only will Red Hat still be Red Hat, it will be a bigger, better version of itself. I discussed how the company’s modernized

logo attempted to preserve the company's roots while framing Red Hat's opportunities ahead, and looked at how attendees reacted to the entirety of the Red Hat voice throughout the conference.

I described the framework Red Hat used to reaffirm its core identity, and showed the trade-offs involved in crafting that framework. And while most companies will likely not face the same exigencies of Red Hat's rhetorical situation, many will be forced to adapt their tone and focus in the face of rapidly changing circumstances due to the ongoing COVID-19 pandemic, which is still well underway at the time of this writing. Perhaps my analysis in this chapter can offer one framework for understanding how companies with collaborative, open cultures deal with existential threats to their brand and their business.

In my next and final chapter, I will draw conclusions I learned about the Red Hat voice from across the three studies of this dissertation, and lay out a plan for continuing this research.

## CHAPTER 5: Conclusion and further research

This project started as a way to find out whether Red Hat sounds the way it says it sounds, and what accounts for the gap if there is one. In retrospect, I realize now I approached that question expecting to analyze a fixed point; instead, I have been working with a moving, shifting idea that is a corporate voice.<sup>25</sup> That challenge is amplified with academic research that usually takes place over a period of several years. Arguably, if I had written this dissertation about the Red Hat voice between 2013-2016, I would have written about the company's growth and expansion, the startups it acquired, and how its advertising campaigns reflected its brand. But the period between 2017-2020 was marked at Red Hat by the biggest changes of the decade and, arguably, the most substantial in the history of the company (at least as far as the corporate voice and Red Hat brand are concerned).

At the start of that three-year period, my initial expectations about the Red Hat voice and tone were based largely on my experiences as a writer on the Content team since 2013. Those experiences included the nature of my assignments, working with other teams within Marketing Communications, and getting feedback about my copywriting from internal stakeholders and Red Hat executives. I learned to write in the Red Hat voice the same way that many of the interviewees in Chapter 2 described: I had mentors who reviewed my work, I had resources like the style guide and existing content to study, and—most importantly—I had to learn by doing. At Red Hat, that meant collaborating with others. At its best, that collaboration meant finding a compelling middle ground between my ideas and someone else's, based on what we knew our audience responded to, and building on the existing, successful work that other writers had done before me. At its worst, that collaboration meant coming to a stubborn impasse over what we

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<sup>25</sup> In Barthes terms, I expected a *text* but encountered a *work*.

were trying to say and how each party thought it should be said, with each of us failing to convince the other of whose copy was better. Or it meant writing with the approver in mind, and not the actual intended audience. I knew that we didn't have a singular authority who could definitively say which of us was right, because the Red Hat voice doesn't flow from a leader atop a marketing hierarchy but through collaboration. I took comfort in commiserating with my team about the other team's decisions, as I'm sure they did about mine, with each of us confident we knew what Red Hat should sound like.

What I failed to understand about the Red Hat voice then, and what I learned about it through the research in this dissertation, is just how much and how deeply that voice and its ideals are shaped by the company's culture. I understood open source as software and philosophy, but at Red Hat it is closer to faith. I knew there was a small group of longtime employees who were its most steadfast adherents, who believe so deeply in Red Hat's purpose that they saw events like the IBM acquisition as a true existential threat to the company and culture they know and love, and not just an indication that a few things might change.

Transparency, collaboration, authenticity, accountability—I had taken these qualities of Red Hat's self-professed personality as, well, as mostly "just marketing." But through my interviews with the Content team, my survey of employees across the company, and my analysis of and survey at Red Hat Summit 2019, I've come to conclude that what Pickard (2019) says about voice is true for Red Hat in 2020:

voice [is] about knowing who you are, it's your internal kind of sense of who you are as a company, your values, your brand, the motivations for why you sound how you sound, it's the base you build on. And tone is about how you sound in the world. So, modulating that and making sure that you're talking to your audience and you know who your

audience is...The culture turned inward creates our product. The culture turned outward creates our brand.

That outward-facing culture at Red Hat is co-constructed by employees and leadership alike and by writers and readers alike, every day, through thousands of interactions and choices about what “feels” like Red Hat and what does not. Had I not done this dissertation, I may have eventually come to this realization on my own. But the advantages of learning this through my research here is that I get to apply the wisdom I’ve gleaned to my everyday work of connecting the right message with the right tone with the right audience at the right time, while hopefully showing how fruitful collaborative research can be between the tech industry and academia.

## **Reflection**

I identified three primary research questions in Chapter 1 that I set out to answer in the chapters between this and that one. I sought to answer how a company’s corporate voice and tone establishes its authenticity for employees, leaders, customers, and critics. I wanted to explore what role familiar rhetorical concepts like style (*elocutio*), ethos, and kairos play in helping us understand how a company’s voice and tone change and adapt to major internal cultural upheavals. And in an organization without traditional, top-down hierarchical power structures governing messaging, I wanted to discover how collaborative decisions are made about what does and does not sound authentic to the corporate voice.

To understand the answers to those questions, I leaned on my training and education as a PhD student in Communication, Rhetoric, and Digital Media at NC State. I employed topics and themes from ongoing conversations in rhetoric (both digital and classical), communication, communities, network theory, and organizational communication, paired with industry discussions of corporate voice and tone, identity, marketing, and brand studies. While it is

certainly possible to perform comprehensive studies of corporate voice and tone in technology marketing without a doctoral research background, I know that *my* understanding of the how the Red Hat voice is created, shaped, delivered, and received was much deeper than it would have been without my coursework and exams in digital rhetoric, rhetorical criticism, and network cultures and technologies.

Style, *kairos*, and *ethos*, in particular, offered a way of talking about effective communication within the community of Red Hat writers. I explored the 5Cs of the brand voice guidelines in our interviews, discovering that the team places a premium on credibility above all else, thereby displaying their sensitivity to maintaining Red Hat's character as a trusted guide in enterprise IT despite potential changes to the company's identity because of IBM and an updated logo and brand system. Crowley and Hawhee (2009) tie these threads together for me, explaining "Like ethical proof, attention to *kairos* in style requires sensitivity to community standards of behavior, since appropriateness is dictated by the standards of the community in which we live...and the community dictates the standards of rhetorical appropriateness as well" (p. 332). Comparing the interviews with writers to the opinions of other Red Hat employees, I saw a similarity in the importance of credibility to the corporate voice across the company, but a key difference revolved around the IBM acquisition. Whereas my survey in Chapter 3 and analysis of Summit in Chapter 4 heavily featured the rhetorical situation of Red Hat's changing identity in the looming blue shadow of IBM, the subject barely came up in the 28 interviews with the stewards of that corporate voice. Perhaps the rest of the company worried more about Red Hat losing its unique culture and voice in the acquisition than writers did, because the latter is closer to the creation and delivery of that voice than the former? That remains an interesting question to address in further conversation with my teammates, if they will oblige me with continuing

interviews.

From those in-depth interviews with Red Hat writers, I learned that the Red Hat corporate voice and tone is established collaboratively through dynamic relationships and interactions among teams of Red Hat stakeholders and audiences. Relationships create communities, and communities collaborate to make decisions about the Red Hat voice. In these interactions, several features are critical to productive and functional collaborations: 1) experimenting with different approaches, (2) using data strategically to develop methods for accomplishing communicative goals, (3) compromising, and perhaps most significantly, (4) building relationships over time. I learned how Red Hat's marketing communications teams (and perhaps, more broadly, how similar teams at similar technology companies) fulfill the two principal functions of rhetoric that Zarefsky (2008, p. 638) identifies, in building community and inspiring people to achieve collective goals. Those collective goals include representing Red Hat's open source culture to its multiple audiences, and through the many marketing outlets each team works on.

From my qualitative survey with other Red Hatters, I learned that my participants have a high overall opinion of the corporate voice, and find it especially credible. The results indicated that many respondents have reservations about the way they see the corporate voice evolving, with some opining for the more rambunctious, early days when Red Hat was the disruptor in the industry and not the established, mature entity it is today. I explained how the data shows some hesitancy about the effects of IBM's acquisition, and argued that the still-evolving nature of this rhetorical situation means that Red Hatters will need to keep revisiting their idea of what "feels authentic" to Red Hat. Oh, and I learned that a lot of people in IT are really tired of hearing about jargon like "digital transformation."

And from my comprehensive analysis of Red Hat Summit 2019, I learned how established conversations about the rhetorical situation help explain the actions Red Hat teams and executives had to take to employ a reaffirming frame to the context of frequent shifts in tone and focus, given reactions to the logo/brand refresh and the IBM acquisition. I approached these reactions and processes first from a rhetorical perspective, grounded in my graduate school training as a humanities scholar. Then, with a small study of conference attendees onsite, I tested those claims against a small audience of attendees, approaching this process from my training in a social science perspective. All four sections served the same purpose—to analyze the corporate voice at Red Hat Summit—but in approaching them from different perspectives, with different methods, I tried to show the range of a CRDM scholar in the professional writing environments outside of academia, extending conversations that were already well underway for decades before I found a way to add my contribution.

Bringing those approaches to my own writing communities at Red Hat is an example of what Ceccarelli (2001) called “conceptual chiasmus,” or:

a rhetorical strategy that reverses disciplinary expectations surrounding conceptual categories, often through metaphor, to promote the parallel crisscrossing of intellectual space. With a conceptual chiasmus, unusual linguistic choices for readers from one discipline to think about an issue in terms more appropriate to their counterparts in another discipline, *and vice versa*. The result of this parallel reversal of disciplinary expectations is that the thought patterns of each side are forced temporarily to cross over to the other side. This crossing over may work to make interdisciplinary action more conceivable to readers from both fields. (p. 5)

I see this interdisciplinarity prospect especially in my own voice and tone research for my career at Red Hat. As a locus for professional writing and community interaction, Red Hat offers

academics ample research opportunities. In turn, scholarly rhetorical approaches for analyzing and explicating texts and communities offer Red Hat marketers an expanded toolkit to better understand their writing practices and audience relationships. One example from my own job duties would be to collect several dozen headlines that Red Hat copywriters wrote for advertising campaigns, identify those that employ rhetorical devices (e.g., anadiplosis, epistrophe, or meiosis), and compare their success rates in getting audiences to click through and engage with more content on redhat.com. If a corollary exists between certain rhetorical devices in copywriting and what Red Hat audiences find compelling, understanding this relationship in depth could aid marketers as the shape and deliver the Red Hat voice. Another potentially useful academic approach for Red Hatters to better understand how their corporate voice is perceived is through a deeper analysis of the link between *ethos*, brand, and credibility, especially in digital forums. A third exploration of an academic concept to assist Red Hat marketers could be studies of hybrid spaces, mobile interfaces, and virtual environments—especially as companies with traditional in-person conferences learn to navigate the COVID-19 landscape with virtual events. With the framework I've presented throughout my research here, I have hopefully offered useful contributions to the networks of my academic past and my professional future, and I look forward to bolstering the bridges of both with further research.

### **Limitations of my studies and directions for further research**

The three studies examined in this dissertation offer compelling insights into the way Red Hat's corporate brand voice is created, executed, and received by internal and external audiences. However, as with any research project that analyzes a large bureaucracy and rapidly changing industry, these studies are limited in several ways and provide opportunities to extend them through further research.

Interviews conducted in Chapter 2 with members of Red Hat's Content team were both fruitful and thorough, but did not represent the entire team, as several members declined to be interviewed (or joined the team after the interviews had concluded). For preserving anonymity for my participants, I assigned gender-neutral pseudonyms and did not identify any interviewees by race, but what role does race and gender play in building expertise and authority as a writer at Red Hat, given that the tech industry is overwhelmingly white and male? It's worth asking, and worth including in subsequent phases of my voice and tone research. Additionally, during this dissertation, the Content team grew in number and evolved in responsibilities, taking on new duties not previously covered and embracing new tools, strategies, and policies. Ideally, continuing research in this area would extend not only to the members of the Content team who were unavailable to interview, but to each and every individual across Marketing Communications. How do IT industry analysts view Red Hat's identity, and how do members of the Analyst Relations team both shape and interpret those perspectives? How do project and account managers decide what requests are the highest priority, and what do those priorities say about how Red Hat projects itself to its audiences? What factors do graphic and motion designers consider when creating visual assets for events, campaigns, and the web? How has the visual identity of the brand evolved over time, and what factors compelled that evolution? In an ideal world, time would stop for long enough to interview each contributor in Marketing Communications for an hour to get their input.

The internal survey in Chapter 3 provided a remarkable window into the opinions and perspectives of Red Hatters outside of the Content team. Many of those same survey volunteers are likely internal stakeholders that submit requests for marketing help through the Marketing Communications intake queue. Nearly 40% of responses came from the Products and

Technologies organization, which has substantial marketing resources, experts, priorities, and budgets of its own. One of the central points of interest through the Content team interviews was observing how the Red Hat voice is negotiated between MarComms and PnT, in ways that can get quite heated. For a team, department, and organization that prides itself on making data-driven decisions, it was illuminating to see how the rest of Red Hat weighs in on the consequences of those decisions. With that said, the internal survey was completed by 135 employees—that's less than 1% of the total global Red Hat organization (which now numbers more than 15,000 associates). How complete a picture can be painted with such a small representation? The issue of timing comes to bear as well, as this survey was live before IBM announced that its CEO, Ginni Rommety, would be stepping down and replaced by IBM's head of the cloud business unit, Arvind Krishna, and that Red Hat's popular CEO and President, Jim Whitehurst, would be assuming the title of IBM president. Survey respondents may have answered differently on certain questions, especially those that asked whether the Red Hat corporate voice would change and become closer to IBM's, and why. An ongoing survey, either quarterly or yearly, would help inform a more complete understanding of the mechanics and nuances of the Red Hat voice.

The survey in Chapter 4 conducted among Red Hat Summit 2019 attendees gave me immediate feedback to understand how the event theme resonated (or failed to resonate) with a diverse audience. It offered my first data that measured the success of each of the 5Cs of the voice guidelines, and gave me an opportunity to measure those results against how Red Hat's internal audiences view the corporate marketing voice. And while not comprehensive, the short interviews at Red Hat Summit also provided anecdotal quotes that helped to illustrate several of the friction points and missed opportunities for the Red Hat marketing team to pursue in the

future. Obviously, the data set would be made stronger by repeating the survey and interview at each subsequent Red Hat Summit from 2020 and beyond, and our picture of the attendee experience would be more complete with an expanded participation pool.

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To demarcate a limit to my research and stick to it has been perhaps the most difficult challenge of this dissertation, and one that stymied me in two previous attempts at finishing. For the endlessly curious, there is always more to learn. Therefore, I take it as a sign of academic maturity, as it were, that I am finally able to consider this as Phase One of my years-long research into Red Hat's voice and tone. One dissertation does not have to be exhaustively comprehensive. I know that now. New writers are still being hired with regularity. It is okay that a survey did not include every single Red Hatter's opinion. Every year there is another Red Hat Summit, another new bespoke theme, and a mostly new group of attendees with feedback to give. The Red Hat voice is not a fixed point in space; it grows, and so too must the study of it. With this dissertation behind me, I can confidently—*authentically*—say that I am looking forward to the next phase.

My analysis showed that the Red Hat voice is not a solo but a chorus, developed and refined through collaboration that is based on the principles of open source central to the company's culture. I argued that chorus, once harmonious, is in the process of potentially radical change that threatens cacophony as the company grows bigger and is pulled further away from its roots. I argued that authenticity and trust are central to its perception, and that only through a constant consideration of audience can Red Hat writers know whether the voice sounds the way it should sound and the way they think it sounds.

So, does Red Hat actually sound the way its marketing says it sounds? I don't know—not

just yet, anyway. But I have the makings of more questions and a body of research to compare it to. Instead of the be-all, end-all treatise on the voice of Shadowman, this dissertation functions more like an open source project. I started with curiosity, collaborated with several groups, gathered insights together to assemble something worth building on, and released it for the world to read and improve.

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## **APPENDICES**

## Appendix A: Writer interview informed consent form

### North Carolina State University INFORMED CONSENT FORM for RESEARCH

**Title of Study:** A qualitative study of open source technology writers and their impact on corporate voice and tone (#17974)

**Principal Investigator:** Matt Morain, memorain@ncsu.edu, 919-612-5930

**Faculty Point of Contact:** Dr. Andrew Binder, arbinder@ncsu.edu 984-644-1973

#### **What are some general things you should know about research studies?**

You are being asked to take part in a research study. Your participation in this study is voluntary. You have the right to be a part of this study, to choose not to participate and to stop participating at any time without penalty. The purpose of this research study is to gain a better understanding of the processes and people who use and adapt the Red Hat corporate voice and tone in their marketing efforts. We will do this through asking you to participate in an interview with Matt Morain, senior copywriter at Red Hat.

You are not guaranteed any personal benefits from being in this study. Research studies also may pose risks to those who participate. You may want to participate in this research because it will give Red Hatters a better understanding of the company's corporate voice and tone. You may not want to participate in this research because we will be discussing specifics of your job at Red Hat.

In this consent form you will find specific details about the research in which you are being asked to participate. If you do not understand something in this form it is your right to ask the researcher for clarification or more information. A copy of this consent form will be provided to you. If at any time you have questions about your participation, do not hesitate to contact the researcher(s) named above or the NC State IRB office (contact information is noted below).

#### **What is the purpose of this study?**

The purpose of the study is to learn how Red Hat employees working in marketing create, maintain, enforce, revise, and adapt to the Red Hat corporate voice and tone.

#### **Am I eligible to be a participant in this study?**

There will be approximately 35-50 participants in this study.

In order to be a participant in this study, you must be an employee of Red Hat.

#### **What will happen if you take part in the study?**

If you agree to participate in this study, you will be asked to do all of the following:

1. Review a list of questions about the Red Hat corporate voice and tone.
2. Answer questions about your job duties at Red Hat in a 1:1 interview with Matt Morain, to be held onsite at the Red Hat tower or virtually over video conferencing. The interviews will be recorded with audio only (no video or photos).
3. Interviews will be transcribed either by Matt Morain or by rev.com, and you will have the option of accessing your interview transcription after they're completed.

The total amount of time that you will be participating in this study is between 30-60 minutes.

You might benefit from this interview through more self-awareness about your work at Red Hat, and the insights gained from all interviews will help Red Hat writers and marketers better understand the role, creation, and execution of the Red Hat corporate voice.

## Audio recording

If you want to participate in this research, you must agree to being audio recorded. If you do not agree to being audio recorded, you cannot participate in this research.

## Risks and benefits

There are minimal risks associated with participation in this research. There are no direct benefits to your participation in the research. The indirect benefits are that employees who write for, shape, contribute to, and maintain Red Hat's marketing voice will gain a better understanding of how that voice is seen by other teammates and by Red Hat's audiences. This, in turn, will help their day-to-day jobs.

## Right to withdraw your participation

You can stop participating in this study at any time for any reason. In order to stop your participation, please tell Matt Morain during the interview. If you choose to withdraw your consent and stop participating you can expect no consequences or ramifications to your job at Red Hat, and all information recorded during the interview will be destroyed.

## Confidentiality

The information in the study records will be kept confidential to the full extent allowed by law. Data will be stored securely on a Red Hat managed computer, behind multiple passwords and secure VPN storage. Your name will be replaced with a randomly assigned, gender-neutral pseudonym in Matt Morain's dissertation and in transcripts. A single spreadsheet of record that matches participant to pseudonym will be kept, securely and privately, by Matt Morain, who will not share that resource with anyone else. Your name will be removed and a pseudonym will be used in its place in all transcripts and write-ups.

### What if you are a Red Hat employee?

Participation in this study is not a requirement of your employment at Red Hat, and your participation or lack thereof, will not affect your job.

## What if you have questions about this study?

If you have questions at any time about the study itself or the procedures implemented in this study, you may contact the researcher, Matt Morain, 2417 Kirk Ave Raleigh NC 27603, [memorain@ncsu.edu](mailto:memorain@ncsu.edu), 919-612-5930.

### What if you have questions about your rights as a research participant?

If you feel you have not been treated according to the descriptions in this form, or your rights as a participant in research have been violated during the course of this project, you may contact the NC State IRB (Institutional Review Board) Office via email at [irb-director@ncsu.edu](mailto:irb-director@ncsu.edu) or via phone at 1.919.515.8754. An IRB office helps participants if they have any issues regarding research activities.

You can also find out more information about research, why you would or would not want to be a research participant, questions to ask as a research participant, and more information about your rights by going to this website: <http://go.ncsu.edu/research-participant>

## Consent To Participate

"I have read and understand the above information. I have received a copy of this form. I agree to participate in this study with the understanding that I may choose not to participate or to stop participating at any time without penalty or loss of benefits to which I am otherwise entitled."

**Participant's printed name** \_\_\_\_\_

**Participant's signature** \_\_\_\_\_

**Date** \_\_

**Investigator's signature** \_\_\_\_\_

**Date** \_\_

## Appendix B: Recruitment email sent to memo-list for study in Chapter 4

Hi!

I'm Matt Morain. I've been a Red Hatter for 6 years. I nerd out about the way Red Hat talks to the world, and I need your help. I'm going to ask you to spend 8 to 13 minutes taking a survey.

Here's what I want to know: Do Red Hatters think our corporate marketing voice is effective for our audiences and authentic to our brand?

If you want to jump straight to the survey, here it is [link]. If you want some context first, read on.

See, I've been studying Red Hat's voice and tone for the last 3 years. We have a pretty good idea of how we want to sound in our marketing communications. I want to know if we're living up to that goal. I've interviewed hundreds of attendees onsite at Red Hat Summit to see how our event messaging resonates. I've interviewed dozens of our in-house writers to see how messaging is created and refined. And now I'm excited for this next phase—that's where you come in.

- \*Maybe you've read something we've written and thought, "Well that doesn't sound like Red Hat."
- \*Maybe you've wondered what will happen to our personality as a company in light of the IBM acquisition.
- \*Maybe you think IT marketing is overloaded with jargon and buzzwords.

The key here isn't formal language rules of right and wrong—the key is how we connect with our audiences, consistently, in a way that's authentic to who we are as a brand, as a company, and as a trusted leader in enterprise open source. In a way that's true to our voice and tone standards. In a way that feels like Red Hat.

Because the more we understand how Red Hatters think we should sound, the more authentic our company voice can be.

So, here's the survey. [link]

Your answers will be anonymous and your email address will not be collected. If you want to share more thoughts with me about our voice and tone or my research, I'm at mmorain@redhat.com.

Thanks for your time!  
-Matt

p.s. And full disclosure: I'm also including this research in my dissertation at NC State, so you'll see a required informed consent form with a full explanation in the survey.

## **Appendix C: Internal corporate voice survey distributed to Red Hatters via memo-list**

Is Red Hat's corporate marketing voice and tone effective for our audiences and authentic to our brand?

### **SECTION 1 of 7: Is Red Hat's corporate marketing voice and tone effective for our audiences and authentic to our brand?**

We'll explore that question in this survey, which should take 8-13 minutes to complete. This survey is anonymous. It will not record your email address. You are not being asked for personally identifying information.

If you're interested in sharing your thoughts about the survey in more detail, or if you have any questions, email me at [mmorain@redhat.com](mailto:mmorain@redhat.com).

NOTE: This survey is also part of a dissertation research project at North Carolina State University about Red Hat's corporate voice and tone. It has been approved by the university's Institutional Review Board, which requires the informed consent form you'll need to read and accept on the next screen.

Participation in this survey is strictly voluntary, and you can end your participation at any time.

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### **SECTION 2 of 7: Informed consent form**

North Carolina State University  
INFORMED CONSENT FORM for RESEARCH

\*Title of Study: A study of how employees at a large open source technology company assess their company's corporate voice and tone (#20438)

\*Principal Investigator: Matt Morain, [mmorain@redhat.com](mailto:mmorain@redhat.com), 919-612-5930

\*Faculty Point of Contact: Dr. Andrew Binder, [arbinder@ncsu.edu](mailto:arbinder@ncsu.edu) 984-644-1973

\*What are some general things you should know about research studies?

You are being asked to take part in a research study. Your participation in this study is voluntary. You have the right to be a part of this study, to choose not to participate and to stop participating at any time without penalty.

The purpose of this research study is to understand how Red Hat employees impact, use, and assess the efficacy of the company's corporate voice and tone. We will do this by asking you to participate in an online, anonymous survey hosted on Red Hat's private Google Suite.

You are not guaranteed any personal benefits from being in this study. Research studies also may pose risks to those who participate. You may want to participate in this research because it will give Red Hatters a better understanding of the company's corporate voice and tone. You may not want to participate in this research because you are not comfortable submitting anonymous feedback about your employer.

In this consent form you will find specific details about the research in which you are being asked to participate. If you do not understand something in this form it is your right to ask the researcher for

clarification or more information. A copy of this consent form is available to download upon request. You may also print this page as a PDF. If at any time you have questions about your participation, do not hesitate to contact the researcher(s) named above or the NC State IRB office (contact information is noted below).

\*What is the purpose of this study?

The purpose of the study is to learn what Red Hatters think of the company's corporate marketing voice, specifically how effective it is for our audiences and how authentic it is to our brand.

\*Am I eligible to be a participant in this study?

There will be approximately 500-1,000 participants in this study. To be a participant in this study, you must be an employee of Red Hat.

\*What will happen if you take part in the study?

If you agree to participate in this study, you will be asked to complete a series of questions about Red Hat's brand voice, how it's changed, and how it should.

The total amount of time that you will be participating in this study is between 8-13 minutes.

\*Risks and benefits

There are minimal risks associated with participation in this research. There are no direct benefits to your participation in the research. The indirect benefits are that employees who write for, shape, contribute to, and maintain Red Hat's marketing voice will gain a better understanding of how that voice is seen by other teammates and by Red Hat's audiences.

\*Right to withdraw your participation

You can stop participating in this study at any time for any reason. In order to stop your participation, please close the survey in your browser. If you choose to withdraw your consent and stop participating you can expect no consequences or ramifications to your job at Red Hat.

\*Confidentiality

The information in the study records will be kept confidential to the full extent allowed by law. Data will be stored securely on a Red Hat managed laptop. \*\*Your name and email address will not be recorded.\*\*

\*What if you have questions about this study?

If you have questions at any time about the study itself or the procedures implemented in this study, you may contact the researcher, Matt Morain, mmorain@redhat.com, 919-612-5930.

\*What if you have questions about your rights as a research participant?

If you feel you have not been treated according to the descriptions in this form, or your rights as a participant in research have been violated during the course of this project, you may contact the NC State IRB (Institutional Review Board) Office via email at irb-director@ncsu.edu or via phone at 1.919.515.8754. An IRB office helps participants if they have any issues regarding research activities.

You can also find out more information about research, why you would or would not want to be a research participant, questions to ask as a research participant, and more information about your rights by going to this website: <http://go.ncsu.edu/research-participant>

\*To help maximize the benefits of your participation in this project, by further contributing to science and our community, your de-identified information or specimens will be stored for future research and may be shared with other people without additional consent from you.

\*What do some of these terms below mean?

Throughout this consent form there are some repeated words or phrases being used that you might not be familiar with and you may ask the researcher for any additional clarification.

- De-identified information/bio-specimens: This was once identifiable information or specimens that have been recorded by the researcher in a way that your identity is no longer directly on the information or bio-specimen. This means that the researcher either has a master list with your code and real name that they can use to link to the information or bio-specimen or they do not have a list like this and though they used to be able to link your identity to the information or bio-specimen, there is no longer a way to link your real identity to the information.

\*Consent to participate

"I have read and understand the above information. I can print a copy of this form. I agree to participate in this study with the understanding that I may choose not to participate or to stop participating at any time without penalty or loss of benefits to which I am otherwise entitled."

(1) Do you consent to participate?

- Yes, I consent to participate

---

### **SECTION 3 of 7: Quick reset: What's this all about?**

When we talk about our corporate voice (or brand voice), we're talking about how Red Hat sounds to our audiences. Plenty of individuals speak on behalf of Red Hat—think Jim on stage at Red Hat Summit or Saron Yitbarek hosting our Command Line Heroes podcast—but a corporate voice doesn't belong to any single person at Red Hat. It's our overall communication style. And as Red Hatters, we pride ourselves on not sounding like everyone else in IT.

Voice is personality; tone is attitude. You might change your attitude (tone) depending on who you're talking to at the moment, but your personality (voice) more or less stays the same.

We like to think of Red Hat as a trusted guide in enterprise IT and open source. That's why we talk about our personality as open, authentic, helpful, and brave as opposed to, say, authoritative or aggressive or snarky or aloof. But do Red Hatters think we're authentically carrying our unique culture, traits, and personality to the world in our marketing?

Let's find out!

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### **SECTION 4 of 7: A little bit about you**

(2) How long have you worked at Red Hat?

- Less than 1 year
- 1-3 years
- 3-6 years
- 6-9 years
- 10+ years

(3) Which organization are you in?

- People, reporting to DeLisa Alexander
- Products and Technologies, reporting to Paul Cormier
- Information Technology, reporting to Mike Kelly
- Finance reporting to Laurie Krebs

- Sales and Services, reporting to Arun Oberoi
- Marketing, reporting to Tim Yeaton
- Marketing Communications, reporting to Tim Yeaton

(4) Which region are you based in?

- Asia Pacific
- Europe, Middle East, and Africa
- Latin America
- North America

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**SECTION 5 of 7: Authenticity and corporate marketing**

Marketing Communications and Brand represents a significant portion of our corporate marketing efforts. The team reports to CMO Tim Yeaton, as many other marketing teams do (hi there, other marketing friends!). As stewards of the Red Hat voice, we try to convey our core brand personality: to be open, authentic, helpful, and brave.

With the IBM acquisition and our mandate to stay neutral and independent, it's as important as ever to know what kind of messaging sounds authentic to Red Hat and like something our audience would expect us to say.

(5) Are you familiar with the marketing assets this team produces?

	0	1	2	3	4	5	6	7	8	9	10	
No												Yes

(6) Does the corporate marketing voice effectively reflect the value of our products, solutions, and services?

	0	1	2	3	4	5	6	7	8	9	10	
No												Yes

(7) The IBM acquisition officially closed in early July 2019. Have you noticed any change in the way Red Hat sounds since then?

- No, we sound exactly the same as we did before.
- I've noticed a little change.
- I've noticed some change.
- I've noticed a lot of change.
- Yes, we sound completely different than we did before.

(8) If you think we have changed, can you explain what you noticed?

[Long answer text] \_\_\_\_\_

(9) What long-term impact do you think the IBM acquisition will have on the way Red Hat sounds to our audience?

- I anticipate Red Hat will sound more like IBM.
- I anticipate Red Hat will retain our authenticity and corporate voice.
- I'm unsure.



**(14)** The way Red Hat talks to our audience is CREDIBLE: We cite sources, we don't make claims without proof, and we don't overpromise.

	0	1	2	3	4	5	6	7	8	9	10	
Completely Disagree												Completely Agree

---

**SECTION 7 of 7: Voice and tone in the IT industry**

**(15)** Red Hat's communication style is unique in the tech industry.

	0	1	2	3	4	5	6	7	8	9	10	
Completely Disagree												Completely Agree

**(16)** Compared to other IT companies, Red Hat uses less jargon.

	0	1	2	3	4	5	6	7	8	9	10	
Completely Disagree												Completely Agree

**(17)** Is there another IT company that has a clearly defined marketing voice that speaks to you in particular? Which company, and what is it about the way they communicate that makes it work for you?

[Long answer text] \_\_\_\_\_

**(18)** You probably hear a lot of buzzwords and jargon from technology companies every day. Are there any IT words or phrases that suffer from overuse?

[Short answer text] \_\_\_\_\_