



CASE STUDY - CATERPILLAR, INC.



Client: Caterpillar, Inc. - Peoria, IL

Problem: Need to host a PR event to announce a multi-billion dollar merger to media, dignitaries, governments, and the stakeholders of both companies.

Solution: Strategic brand messaging, event activation, and PR



In 2011, Caterpillar initiated a buyout of Milwaukee-based mining equipment manufacturer Bucyrus International for \$7.6 billion. CAT needed to host a PR event to announce the merger. The event had a very tight timeline and was clouded in secrecy due to the timing of international government approvals related to the merger. The event was created in advance, with no set date or time, and initiated only 48 hours after the final government approval was given. The key to k2forma's success in this case was our intimate understanding of the cultural nuances of each company, along with our ability to deliver high quality results under extreme circumstances.

Our Approach

Our communication strategy for the event was themed 'Shared Heritage' to convey the similarities of the companies being joined, including their heritage, employees and business markets. The tone of the event was set using vintage imagery from each company's historical archive and the 'Shared Heritage' theme was carried forward in all communication tactics. We developed the entire event, along with all graphics and room conditioning elements, in total secrecy and without a deadline. We went to Milwaukee three weeks before the anticipated merger approval date and we assembled all of the event elements and put them in storage. Within 48 hours of receiving the final merger approval from China, we went up to Milwaukee and deployed the event.

Results

- Outstanding feedback from our clients and event participants.
- Attendees included governors from Wisconsin and Illinois, along with media and executive leadership from both companies.
- Our messaging strategy served to establish a basis of commonality between the employees of two companies that had formerly been rivals, setting the tone for a more harmonious merging of cultures and people.
- The visual timeline that we developed as the centerpiece of the event was later installed in the Caterpillar Mining Museum in Milwaukee, Wisconsin.

Event Activation

For the Caterpillar/Bucyrus dignitary event, we were keenly aware of the sensitivity that this merger would hold for each community. Our communication strategy for this event was to highlight how much each community had in common. We expressed this as 'Shared Heritage'. This theme was executed through historic imagery from both companies, culminating in a graphic timeline that showcased the achievements of both organizations together. We used vintage elements throughout the event to further emphasize the shared contributions by each company to the mining industry.

- Vintage mining lanterns, wooden dynamite crates, and antique mining equipment in displays
- Created a stunning visual timeline of both companies that was printed on clear acrylic and was later placed in the Caterpillar Mining Museum in South Milwaukee, where it still resides today.
- Created an event logo in the 'Shared Heritage' theme that was incorporated into event materials including signs and table runners.
- A series of free-standing lollipop signs combined historical imagery and the tag line "Together We're Making History" which were used as way-finding and event décor.

