

*Customer Relationship Management Toolset from flatbridge*

*Increases Enrollments*

*Streamlines Marketing and Selling Efforts*

*Enhances Student and Company Relationships*

*Reduces Administrative Costs*

*Innovative and Affordable*

.....CRM Toolset

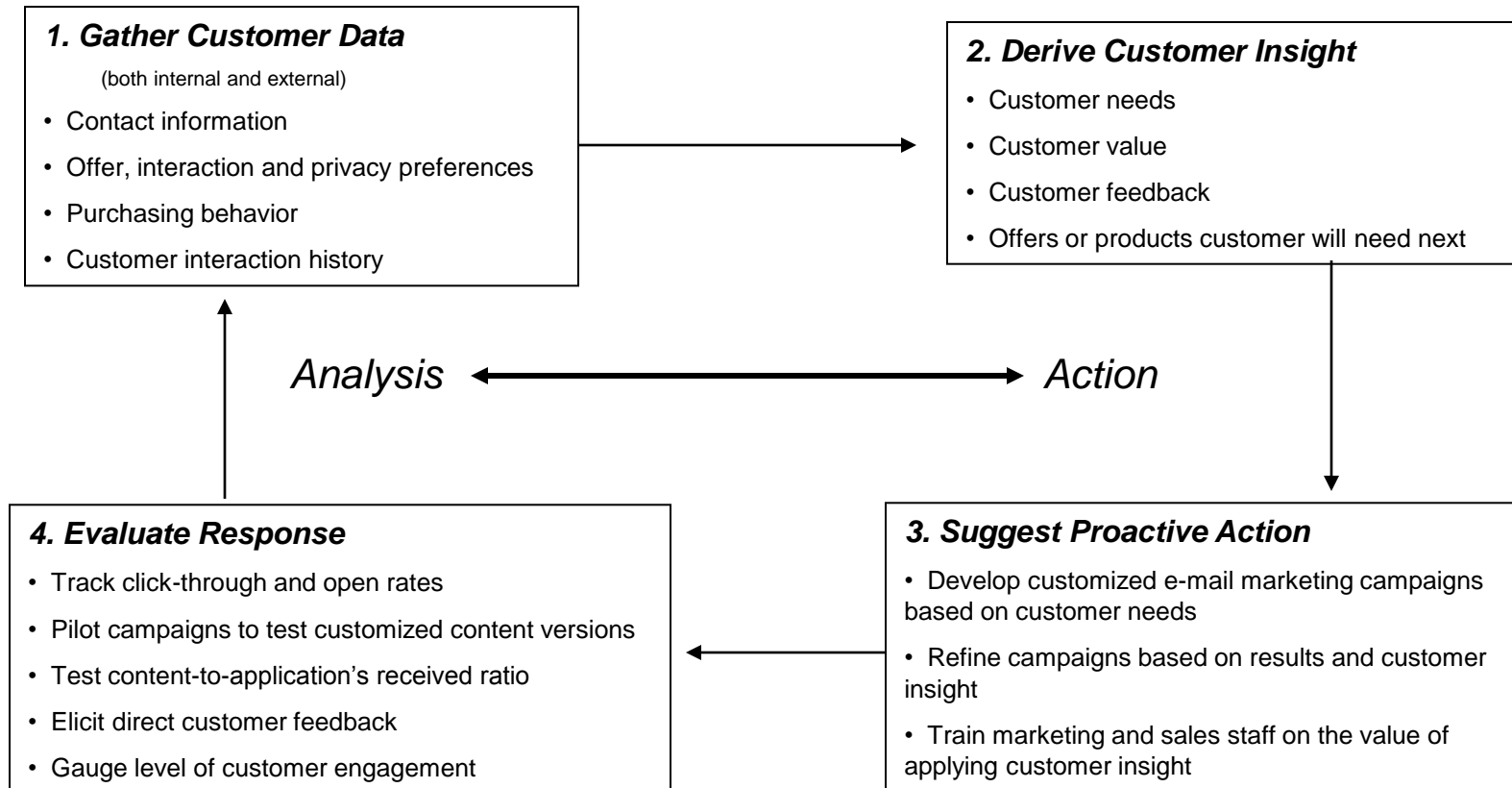
# ***Evolving Direct Mail Into Customer Relationship Management***

July 2010

- Email as an effective form of direct marketing has established itself over the last ten years
- Despite the consumers' frustrations with spam and the mailers' challenges resulting from recent legislation, email marketing has become one of the recognized and accepted tools of marketing communications
- The email campaign is evolving from grabbing a list of 10,000 names and blasting a sales message to it, into a more sophisticated process of:
  - Defining a discriminated target list
  - Crafting a marketing or sales message to “fit” the target audience
  - Including brand images, tag lines and other visual features on the email
  - Tracking the disposition of the emails sent
  - Reaching out to those who opened the email, but did not necessarily “click-through”
  - Positioning the email as one step of a marketing communications plan
  - Measuring the direct revenue impact of each mail campaign
- Direct emails are continuing to evolve to become a part of customer relationship management strategies

## Taking Things To The Next Level

### Evolving Direct Email Into A Customer Relationship Management Tool



- Transaction-based emails are event driven and do not develop long-term relationships
- Relationship-based emails foster customer relationships that endure over time

### *Shift From The Transaction Mindset To The Relationship View*

- We all have
  - Purchased mail lists to use in our marketing efforts
  - Linked information capture devices on our websites' at our downloadable brochures
  - Used web analytics to understand browsing and interest patterns of website visitors
  - Documented calls to and from customers and potential customers
- In these efforts we typically capture contact-type or transaction-type information, but seldom obtain information relevant to customer preferences or interests that would provide insight into purchasing behavior
- How do you start to shift your mindset to a relationship view
  - Develop a list of characteristics or a profile of customers that will likely purchase
  - Collect information about these characteristics at every interaction opportunity
  - Summarize the rich interaction data and discover what it tells about purchasing behavior or purchasing types
  - Use this information to when you develop your mail list segmentation criteria and when you are crafting your marketing messages (in your marketing messages respond to what you find they want and need and to what is of interest to them)

### *Shift From The Transaction Mindset To The Relationship View*

- You can train customers and potential customers to tell you what they need and want; you just need to ask and then listen
- One difference between a relationship and a transaction is “caring”
- Relationships require caring about your customers; their needs, wants and values; they will tell you how to “sell” to them and what they would like to purchase next
- An ideal way to accomplish this is through email or web-based surveys
  - Surveys cause interactions with your customers (interactions are required for relationships)
  - Surveys cause your customers to engage you
  - Surveys can tell you
    - ✓ When and how to best engage your customers
    - ✓ What your customers like and don’t like about existing services
    - ✓ What product or service your customers would like to acquire next
- As you interact with your customers you must capture what you learn and save it for future use; this needs to be accomplished specifically by customer, not generally; what you learn will allow you to put the “profit” into loyal customer relationships

### *Shift From The Transaction Mindset To The Relationship View*

- Broadcast emails need to be more than infomercials or announcements of sales, they need to be calls to action for your customers within the context of your relationship
- How can the message in a mass direct email campaign feel personal to the reader; only through applying principles of mass-customization to the message content
- Relationship-based email campaigns do not blast the same message to 10,000 names on a regional purchased list; they are broadcast to smaller groups, that have been defined based on similar interests, and each group receives a marketing message which is unique to their interests and to the relationship stage they are in with you
- In short, relationship-based emails get the right message, to the right customer, at the right time; this means that each message does not need to contain a “closing” statement
- Why? Our marketing message has the best chance of driving purchase behavior if it arrives in front of the customer when she has been “readied” for it and is at the stage in your relationship where she is ready to act
- How do we do this, by effectively employing the data and information we gather during our two-way communications

## Shift From The Transaction Mindset To The Relationship View

Several Examples Of What You Must Measure	Benefits
Click-through and open rates	<ul style="list-style-type: none"> <li>• Understand what messaging works and what messaging does not</li> <li>• Feedback on optimum time for delivery</li> <li>• Interest level for particular targets based on how many times mail is opened or passed to another for viewing</li> </ul>
Results of pilot email campaigns to test messaging	<ul style="list-style-type: none"> <li>• Ensure messaging is on point for your target market</li> <li>• Obtain feedback on previously unknown needs and wants</li> </ul>
Closure ratios from promotions and campaigns	<ul style="list-style-type: none"> <li>• Effectiveness of messaging</li> <li>• Return on investment</li> </ul>
Average time spent in each sales funnel stage	<ul style="list-style-type: none"> <li>• Planning timelines for marketing campaigns</li> <li>• Cost of marketing by funnel stage</li> <li>• Insight as to what messaging and media works best in each stage</li> </ul>
Profile characteristics of those enrolling	<ul style="list-style-type: none"> <li>• Demographic, socio-economic and interest information for use in defining future target groups</li> <li>• Reduce cost of marketing with more focused approach to “most likely to purchase” customers</li> </ul>
Profile characteristics of companies sponsoring enrollees	<ul style="list-style-type: none"> <li>• Demographic, socio-economic and interest information for use in defining future target groups</li> <li>• Reduce cost of marketing with more focused approach to “most likely to purchase” customers</li> </ul>

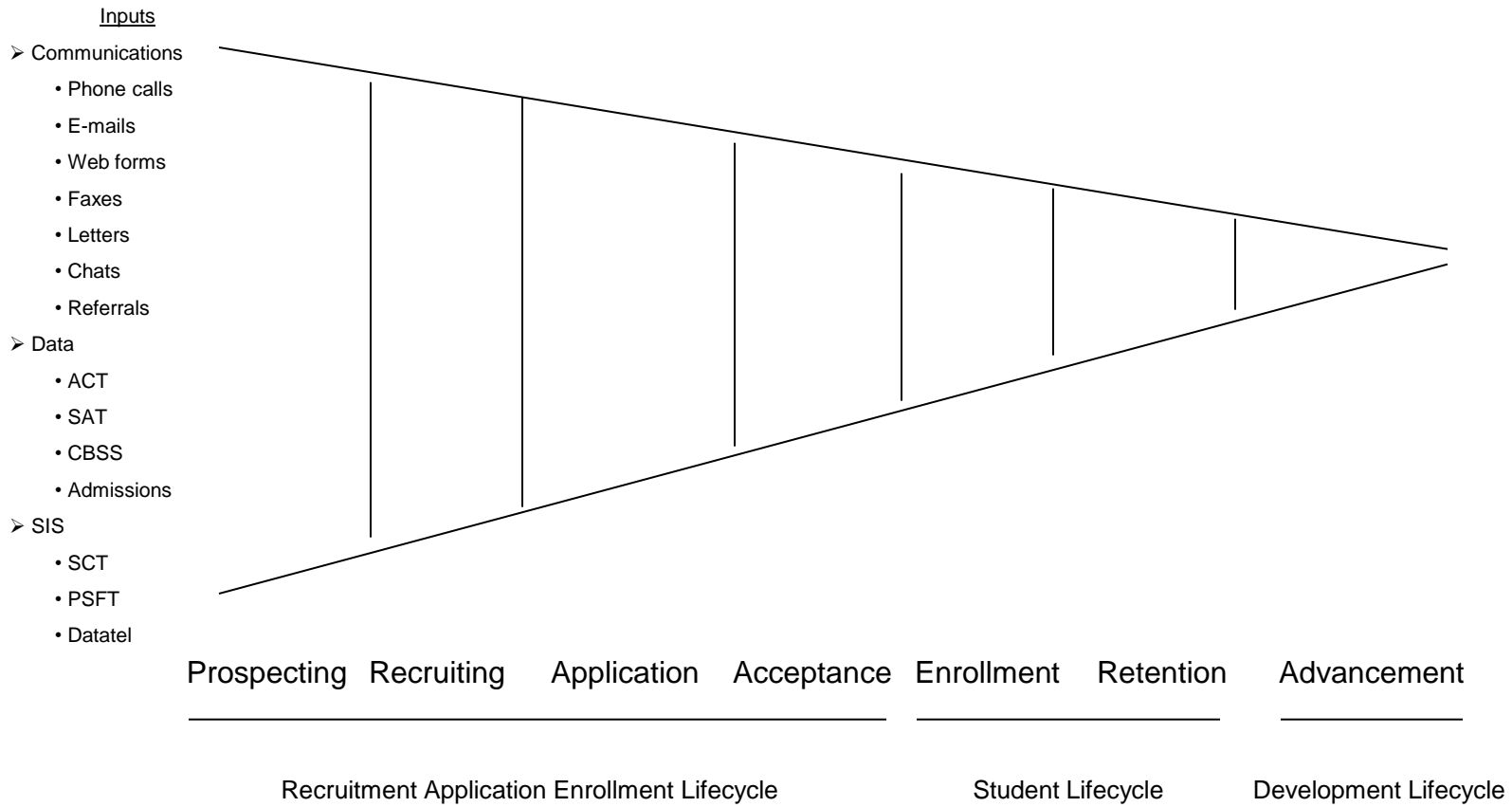
- If you don’t measure it, you will not achieve it
- Only measure what you will use
- Make sure you know how to convert what you measure into action

## *Application Is Not Rocket Science*

- Tools required to enable your organization to do customer relationship marketing
  - Relationship or sales funnel
  - Accessible repository for what is learned from all customer interactions
  - Survey instrument and data capture tool
  - Email tracking tools, i.e. open rates and click-through rates
  - Capabilities to analyze, assimilate and store learning's from customer interactions
  - Business processes with work flows defined to perform the relationship management activities
- The tools required consist of a mix of people, process and technology
- While customer relationship management starts as a state of mind, it requires organization capabilities and discipline to be successfully applied over time

# Sales Or Relationship Funnel

*A Tool For Organizing Activities With Customers And Prospects*



Customers are managed individually through the stages of the sales funnel, not herded through in large groups






FLATBRIDGE - CRM TOOLSET

EVENTS ROOMS SPEAKERS PARTICIPANTS COMPANIES STAFF MARKETING ADMIN TODO'S

CAMPAIGN MGMT EMAIL MGMT INVITATION FUNNEL FUNNEL SCRIPTS REPORTS

 Campaign Management - Trackable Email Campaigns

**NEW** [Click here to create a new campaign](#)

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■ **Email Scripts tied to Campaigns (tracked)**  
Send Email Script to Participants in List using selected Campaign.

Script:

Campaign:

Click on campaign for details

Campaign Name	Date	Campaign Manager	Emails Sent	Distinct Viewed	Total Viewed
<a href="#">NewCamp1</a>	4/7/2005	Alan Parker	3	2	2
<a href="#">Power Lunch Series #1 (Wave 3)</a>	3/21/2005	Chanika Angs	0	0	0
<a href="#">Power Lunch Series #1 (Wave 2)</a>	3/14/2005	Chanika Angs	7	4	4
<a href="#">Power Lunch Series #1 (Wave 1)</a>	3/7/2005	Chanika Angs	8	1	1


- Permits multiple mail waves to the same target list excluding those previously opened
- Increases the penetration (increased open rates) into target list
- Provides for scheduled auto-sends of multiple waves to the same list



## Create a New Campaign Management Script

Script Title:

Email Subject:

HTML Email: 

Plain Text Email:

Use the format below to enter a tag. The tags below can be used to yield the description shown.

Predefined Tags - Format	Description
!Salutation!	Salutation
!Name!	Full Participant Name
!FirstName!	Participant First Name
!LastName!	Participant Last Name
!Date!	Today's Date
!User!	User Name (currently: Rob Berling)

- Script boxes hold email contents (text, hot-links, pictures, etc.) in both HTML and plain text formats
- Predefined tags permit personalization of the emails, with contact specific information or event or interest information
- Contact records are annotated each time an email is sent to a contact or to a list of contacts

[EVENTS](#) [ROOMS](#) [SPEAKERS](#) [PARTICIPANTS](#) [COMPANIES](#) [STAFF](#) [MARKETING](#) [ADMIN](#) [TODOS](#)  
[PARTICIPANT INFO](#) [DETAIL INFO](#) [EVENT REGISTRATION](#) [INVITATION FUNNEL](#) [CONTACT HISTORY](#) [MATERIALS](#)

Global List Management: [View List](#) [Clear List](#)  
 List Management, Participant: [Add to List](#) [Exclude from List](#)

**General Participant Info**

**Angchaisuksiri, Chanika**  
 Vice President  
 Company: [Candy Land Factory](#)  
 100 Main Street  
 Atlanta, Georgia 30039  
 United States  
**phone:** 555-1212  
**fax:** 555-1213  
[test@apower.com](mailto:test@apower.com)  
 Create Date: 3/7/2005  
 Last Updated: 8/11/2005



**LOGON** Participant website

**Event Invitation Management**

[Add New Entry](#)

Offering	Status
<a href="#">Power Lunch Series-12/7/2005</a>	<a href="#">Inquiry</a>
<a href="#">Power Lunch Series-4/9/2005</a>	<a href="#">Registered</a>
<a href="#">Power Lunch Series-2/7/2006</a>	<a href="#">Registered</a>
<a href="#">ORANGE COUNTY ECONOMIC OUTLOOK FOR 2006: Focus on Orange County -11/1/2005</a>	<a href="#">Inquiry</a>
<a href="#">Alumni Society Board Meeting-9/16/2005</a>	<a href="#">Applied</a>
<a href="#">Power Test 1-4/25/2005</a>	<a href="#">Applied</a>

**Invitation Funnel Supporting Material**

Power Lunch #1 Features [View](#)

**Dean Office Liaison**

Assign new staff: [Angs, Chanika](#) [submit](#)

**Email Management**

Script: [Event Application Confirmation](#) [Send](#)

[Send a Quick Email \(tracked\)](#)

**Contact Management - New Contact**

Contact Creator:

Assigned To: [Alan Parker](#)

Contact Type: [to do](#)

Operational Activity: [unassigned](#)

Date:

Description:

[submit](#)

[Create Mail Merge Sheet](#)

**Future To Do's**  
 There are no future to do's for this individual.

**ToDo's Not Yet Completed**

Date	Creator	Assigned To	Description
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- Contact interaction record provides a 360-degree view of all interactions with the contact
- Interaction history is documented
- Sales funnel information by program is maintained
- Detail demographic, socio-economic and interest information is available with a click
- Promises (to do's) for the contact can be managed
- A document store for contact relevant information is readily available

## Technology Is Only An Enabler

Business Process Activities	Enabling Technology Benefits
Email marketing	<ul style="list-style-type: none"> <li>• Improves effectiveness and efficiency of communications</li> <li>• Automatically tracks and monitors responses to emails in email campaigns</li> <li>• Improves quality and level of marketing messages</li> <li>• Reinforces your branding and messaging</li> </ul>
Auto-response emails	<ul style="list-style-type: none"> <li>• Reduces administrative overhead</li> <li>• Improves service levels</li> <li>• Provides immediate responses to standard inquiries</li> </ul>
Lead management	<ul style="list-style-type: none"> <li>• Prevents leads from falling through the cracks</li> <li>• Improves quality of responses to prospect inquiries</li> <li>• Optimizes lead flow from prospect to acceptance</li> </ul>
Contact management	<ul style="list-style-type: none"> <li>• Creates and manage a complete view of each customer and prospect</li> <li>• Segments customers and prospects for targeted campaigns</li> <li>• Provides a centralized depository for customer data</li> </ul>
Marketing metrics	<ul style="list-style-type: none"> <li>• Measures impact of marketing activities</li> <li>• Provides insight for needed mid-term corrections to marketing plans</li> </ul>
Data maintenance	<ul style="list-style-type: none"> <li>• Maintains quality of data</li> <li>• Consolidates duplicate records</li> <li>• Eliminates duplicate emails to same person</li> </ul>

- Evolving to Customer Relationship Management is first a mindset shift
- But, technology is what drives the speed of the transition
- It does not supplant the need for strong business processes or people capabilities
- Technology works with business processes and people

## *For More Information On The CRM Technology*

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