

# Customer Acquisition and Retention Systems



**Gelb Consulting Group, Inc.**

1011 Highway 6 South  
Suite 120  
Houston, Texas 77077

P + 281.759.3600  
F + 281.759.3607  
[www.gelbconsulting.com](http://www.gelbconsulting.com)

# Gelb

# Customer Acquisition and Retention Systems

## Overview

Marketing organizations now have tools to reinforce their value in the sales process. Through sophisticated CRM tools such as Salesforce.com, the marketing executive can now play a role in the organization, distribution, and monitoring of organizational effectiveness.

More importantly, the data stored in the platform can represent some of the best insights to guide strategic marketing decisions. When properly designed and implemented, the oilfield service company's Salesforce.com can guide market segmentation strategies, pricing strategy, and determine how best to communicate product benefits to customers. Understanding the influence of various marketing mix media and messaging is all possible now through the use of this system.

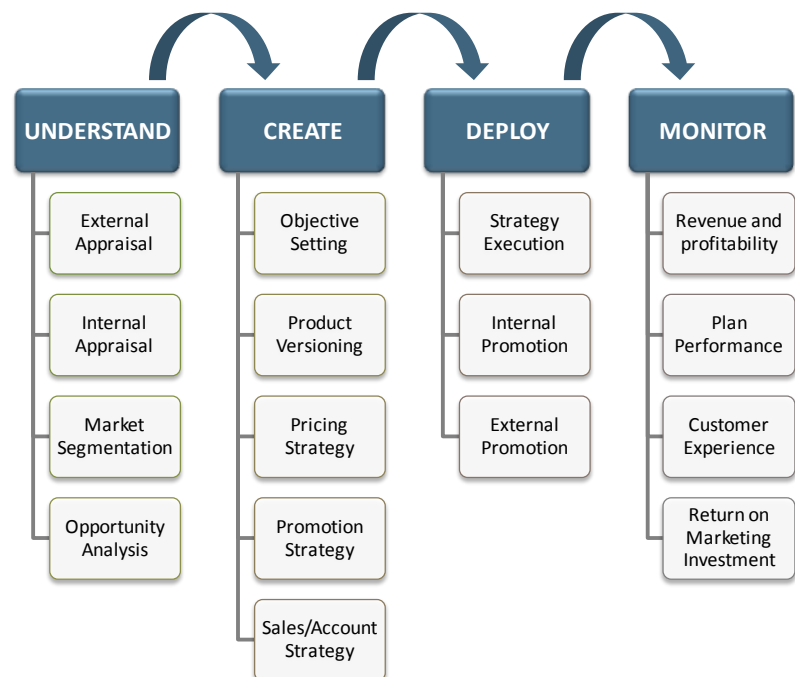
Gelb has monitored sales force effectiveness in the oilfield for over 10 years. We have found consistently that those organizations with exemplary sales force effectiveness scores offer customers the information they want at the time they need it. Unfortunately for most organizations, customer and technical information is located in disparate parts of the company, does not align to the customer experience, and is inconsistently distributed.

Effective information distribution is in the remit for marketing. This means there is a role for marketing to play in the development and maintenance of customer acquisition and retention systems. Today, most marketing organizations focus solely on the development of such technical and persuasive communications. However, as part of the sales tools and process, marketing can play a much more valuable role to those who interact with the customer on a routine basis.

Data captured in a well-executed dashboard can provide key performance indicators such as:

- Technology adoption patterns
- New product opportunities
- Competitive intelligence
- Market share trends
- Key buying behavior
- Identification of at-risk customers for service recovery

Aligned with Gelb's Growth PlayBook, our process to provide structure, service and support to marketing and sales organizations uses a disciplined approach to guide strategic decision making.



# Customer Acquisition and Retention Systems

## Process Overview

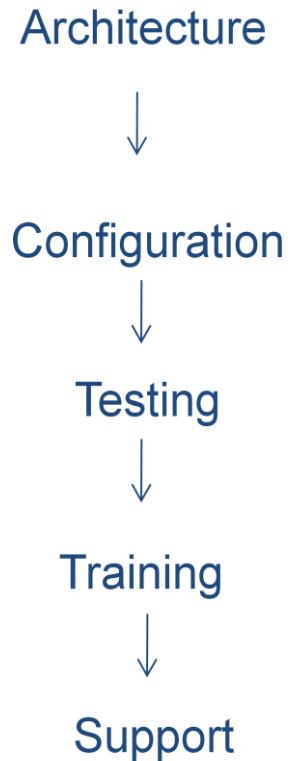
Gelb's process for maximizing sales in a platform such as Salesforce.com follows our established dashboard development process. We have deployed Customer Experience Dashboards for oilfield product and service companies for the past several years. Our client's success stems from the initial creation of system architecture from which information needs, functional and technical requirements flow. Using this blueprint, we configure a new or existing Salesforce.com platform to meet your highest priority needs. The system is then tested and users are trained through both custom digital manuals and on-site reviews. Finally, as experts in strategic marketing, Gelb can monitor results and provide recommendations on communications effectiveness, new product development, pricing strategy, and sales management.

Initially, it will be important to define the scope of action. We have found that a sufficiently narrow scope (e.g., a product line) will ensure an appropriate level of customization, buy-in from key stakeholders, and adequate attention to design. This is intended to increase early adoption of the system. From this foundation, the roll-out process can be more efficiently executed. We have found that the support of current users would be utilized to further your efforts.

In addition, team members should be recruited. Those from marketing responsible for strategic marketing planning, technical marketing, marketing research and sales collateral development are critical to the process. As important are representatives from potential end-user groups who can provide guidance on sales process design, training needs, and functional requirements.

The team members should define critical success factors which will be used to prioritize requirements. Critical success factors may include:

- High frequency of usage among key stakeholders
- Reflection of the existing/desired sales process
- Incorporation of metrics to demonstrate marketing effectiveness



# Customer Acquisition and Retention Systems

## ARCHITECTURE

### Initiation

A thorough review of the documented and practiced sales process is needed to properly assess needs.

Typically, Gelb uses the following sources to understand your current sales process:

- Sales Process Documentation
- Sales Force effectiveness ratings (available through Gulf Research)
- Interviews with key stakeholders
- Materials distributed to customers at each step
- Customer segment categories (if used)

Our conversations at this stage are intended to develop a common understanding of current practices (what's actually done), information needs, barriers to overcome in implementation, and, ultimately, create a product that fits into the desired workflow.



### Sales Process Review

If a formal sales process does not exist, one is created. For tools like Salesforce.com to work effectively, there needs to be documented and practiced activities around each step of the customer experience. At Gelb, we use a customer experience map to detail functional and emotional customer needs as well as touchpoints (i.e., interactions). This experience map is then converted into the sales process (i.e., the things your organization does at each step to influence the buying behavior).

The typical sales process recognizes the differences between leads and qualified prospects, existing customers and unmanaged relationships. Each step must also be properly defined as to create separate actions, materials/touchpoints, and success measures. In the oilfield, the sales process might include some or all of the following:

- Opportunity Identification
- Generating Awareness
- Creating Interest
- Solution Evaluation
- Trial
- Purchase
- Re-purchase
- After-Sales Service

# Customer Acquisition and Retention Systems

Gelb can use either the process defined by our clients or work with you to define the most appropriate steps for your organization. We work with some of the leading minds in sales process design to facilitate your organizations through the development process should one not exist.

Other data elements related to the sales process may include the development of a value proposition, recognition of key buying factors, identifying the buying center, and determining risk factors. Through our Gulf Research studies and other work, Gelb is able to assist organizations in determining the range of potential categories and priorities within each category.

## Data Inventory

Data sources are also reviewed. We review the information desired and information available to make key strategic marketing decisions.

Typical data includes these key performance indicators:

- Customer satisfaction scores
- Market share trends
- Competitive intelligence (by area)
- Products sold
- Target descriptors (e.g., roles, titles)

The data inventory is mapped during the next step to the analytical plan along with data sources. We will define data to be collected/stored for Leads, Opportunities, Accounts, and Contacts.



## Analytical Plan

Using Reports and Dashboards in tools like Salesforce.com provide synthesized information gathered through a host of inputs. To start, we assemble your list of information and insight needs. Often called “pain points” the analytical planning activity will identify key reports.

Examples from our Gulf Research studies include:

- Need better sales forecasts
- Identify areas during which sales are lost
- Determine reasons for losing projects to key competitors
- Identify top customer technical needs
- Understand customer key buying factors

# Customer Acquisition and Retention Systems

Gelb recommends creating and maintaining “Wish List” during the project for initial and long-term system configuration. Items in the “wish list” are prioritized and then translated into functional requirements.

Need	Ease of Implementation	Data Availability	Importance for Measurement
Tracking technical papers	Easy	High	High
Distributing sales Collateral	Moderate	High	Moderate
Website Leads	Hard	Moderate	Moderate
Tracking Trade Show Leads	Moderate	Low	High
Tracking Brown Bags	Hard	Low	Moderate
Advertising Demand Generation	Hard	Low	High

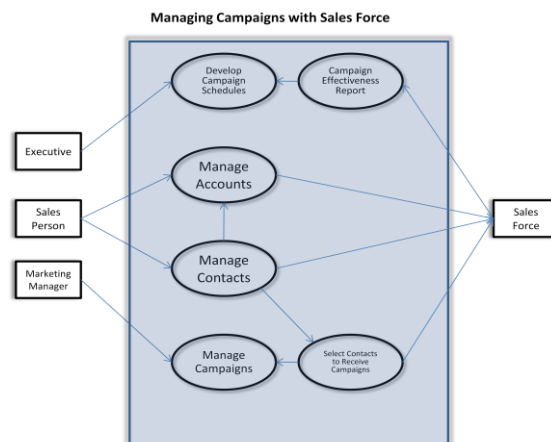
## Functional Requirements

Functional requirements detail how end-users will make use of reports and input data. This documentation takes the form of “use cases” that will illustrate (both through flow charts and text) how profiled users gain the insight they need.

We will outline data sharing model and security, and requirements for off-site availability.

This activity will help to your team envision the final work product and focus programmers on areas that matter most.

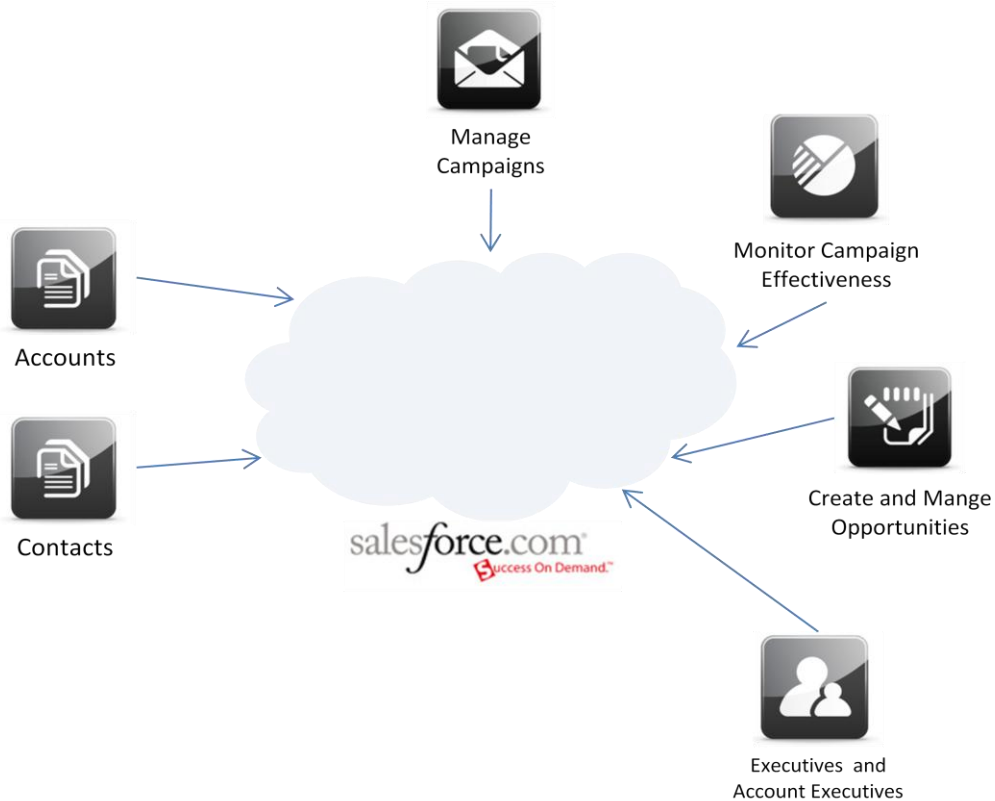
This documentation will serve as a starting point for training materials and users’ manuals.



# Customer Acquisition and Retention Systems

## Technical Requirements

Once functional requirements are defined, it is now time to start determining technical feasibility. Using the work performed to this stage, we will map your needs and information sources. We will develop the CRM architecture (including the need to integrate with existing systems). Since many of our clients are using or plan to use Salesforce.com, we will strive to make the best use of the basic platform with minor customization, third party applications, and then develop recommendations for custom programming.



# Customer Acquisition and Retention Systems

## CONFIGURATION

We will utilize, to the extent possible, tools already present in Salesforce.com. The need for custom programming is usually determined during the Architecture phase and a separate scope of work is developed as necessary.

### **Branding the Interface**

Initial configuration typically includes modifying the interface to reflect your organization (e.g., remove to Salesforce.com branding). We also personalize the interface with your graphics to ensure the “Look and Feel” matches corporate graphic standards. This activity has the benefit of reminding users that the platform has been built to your organization’s specifications.

### **Reflecting the Sales Process**

User names and roles are usually defined during the Functional Requirements stages. During Configuration, we take those roles to develop your hierarchy, company information, security controls and user IDS. It will be important at this stage to establish account owners and permissions for modifying permissions.

The interface is also modified to reflect your sales process. While Salesforce.com provides labels for the process that may make sense to most consumer companies, some of the terms should be configured to reflect the way business is conducted in the oilfield. This includes customer types (e.g., NOC, IOC, independents) or adding other fields to reflect the idiosyncrasies of the oil and gas industry. Some of the other important fields include adding data regarding technical challenges, involvement in deepwater operations, drilling activity, and status of master services agreements.

We have also found that most oilfield service companies require changing/adding fields to include account managers and technical experts. Using terminology that aligns with existing processes and practices will improve adoption.

In addition, Salesforce.com allows organizations to build product and price books for use on opportunities. Setting up these resources is difficult when the sphere of action is broad, which is one of the reasons we recommend starting with a narrow focus.

### **Linking Marketing**

One of the most overlooked aspects of Salesforce.com implementation is incorporating key marketing information. This should include, at a minimum, creating code to link Web-based forms to the database. This is best done by linking contact forms on specific pages back to the database to show marketing impact. For example, an advertising campaign on a new MWD application would send users to a specific page with a uniquely identified contact form.

To track sales response, we recommend including tracking and auto-response tools to the system. This will ensure that users can respond quickly to inquiries, but also that executives can monitor quality and frequency of response. Using Salesforce.com, all of this can be tracked by contact.

## Customer Acquisition and Retention Systems

Marketing can also utilize the system to better manage key messages. We organize these messages by touchpoint, each of which is utilized either to drive sales or support the sales process. An example of the organizational scheme:

<b>Touchpoint</b>	<b>Message</b>	<b>Design</b>
<b>Presentation</b>	What's said and put into deck	Visuals presented, presenter
<b>Article</b>	Copy and context	Illustrations, exhibits
<b>Billboard</b>	Copy – must be succinct	Images that can convey more than words
<b>Press Release</b>	Content	Publication
<b>Trade show</b>	What's said/digital presentations, handouts	Venue, exhibit materials, conversations, people
<b>Sales Visit</b>	Conversation	People, materials design
<b>Advertising</b>	Key messages	Imagery

Finally, documentation produced by marketing can be uploaded, distributed and tracked. This provides the sales person with easy access to relevant information at the time the customer needs it and the marketing executive with a measure of the frequency and effectiveness of such information.

# Customer Acquisition and Retention Systems

## **TESTING**

To insure the system meets all your needs it is import to test and retest.

### **Unit Testing**

One of the great aspects of Salesfoce.com is the core platform has been in development for several years and with that comes several years of testing. Salesforce.com also has an extensive library of custom apps that have been developed and tested by their creators. Should your system require a new custom App, Gelb will insure the custom applications are functioning correctly.

### **Integration Testing**

Effective integration of Salesfoce.com components is critical to the user's experience. End users expect standard and custom Salesfocre.com components to seamlessly integrate with each other. To ensure your users have the best possible experience, Gelb will not only help you choose the right Apps, we'll also test them. Our tests are performed (including data quality checks) against your technical requirements.

### **System Testing**

To ensure the system meets your needs, we recommend assembling a group on end users to interact with the system. These users are normally a group of employees who can provide meaningful feedback and who are integral to the sales delivery or analysis process. Their feedback is reviewed and compared against the functional requirements. Functionality that falls short of the original requirements will be immediately addressed. Functionality not anticipated in the original requirements will be added to a list of future need for prioritization and implementation (i.e., a "wish list").

# Customer Acquisition and Retention Systems

## TRAINING

To get the most of this type of system, change management is necessary. This type of initiative requires a fundamental change to how you do business.

### Internal Communications

Effective internal communications are critical. Employees have different behavioral levers, though. To affect change, communicators must consider the motivators (i.e., a carrot or a stick) and the ability to make the changes (e.g., tools, training, processes). Ultimately, change is typically “voluntary” as most employees will do the work expected to avoid negative repercussions. But to add work load in the form of change or additional responsibilities, the communications should address “what’s in it for me.”

Some of the critical success factors include:

- Senior leaders must be the megaphones through which consistent messages are communicated and reinforced
- An overarching vision be established to ensure all stakeholders are on the “same page”
- Reinforcement must be made at key rollout milestones to ensure adoption

### Events

In addition to messaging, a demonstration of the value of the system is required. In addition to testing, this introduction should be done on-site, whenever possible. Having face-to-face meetings increases the perceptions of endorsement and on-going support. Toward that end, these events should be led by a thought leader within the organization.

The technical aspects of the training can be completed by Gelb. Using the functional requirements, we will outline use cases (e.g., met someone at a trade show). These case studies will be used to create a lead, structure an opportunity, and utilize marketing materials.

# Customer Acquisition and Retention Systems

## **SUPPORT**

As with any business process change, there will be support issues ranging from technical support for supplementary training to identifying what matters most from your new marketing and sales system. Gelb provides both.

### **Technical Support**

Gelb technologists are available during normal business hours and via email (for international users) to respond to technical issues on your Salesforce.com platform. As noted above, we provide training for use on the system and a detailed user's guide. But when sales are on the line or sales people need further guidance on how to make best use of the system, we provide telephonic and web-based demonstrations to ensure use of the system. Using Go-To-Meeting, we are able to see the user's screen, and show our own to illustrate key paths in the system.

As part of our annual support, we will also capture common issues and record them into a Frequently Asked Questions document that will be posted to your system. This will allow a higher degree of self-service when needed and a means for the marketing organization to understand barriers to adoption (if any).

### **Analytical Support**

As marketing strategists, Gelb can identify key trends in your data from new product development opportunities to pricing strategy issues. On an annual basis, our analysts will produce a report using your data and our Gulf Research reports to guide your strategic marketing planning process. Our strategic marketing process, which we call a Growth PlayBook, can identify your strengths and weaknesses, assess competitive threats, determine market share, and guide your marketing team to make strategic marketing decisions to prioritize market segments.

The Growth PlayBook process also includes facilitation around the use of key marketing tactics to increase new product adoption, increase market share, and, ultimately, grow revenues.

# Customer Acquisition and Retention Systems

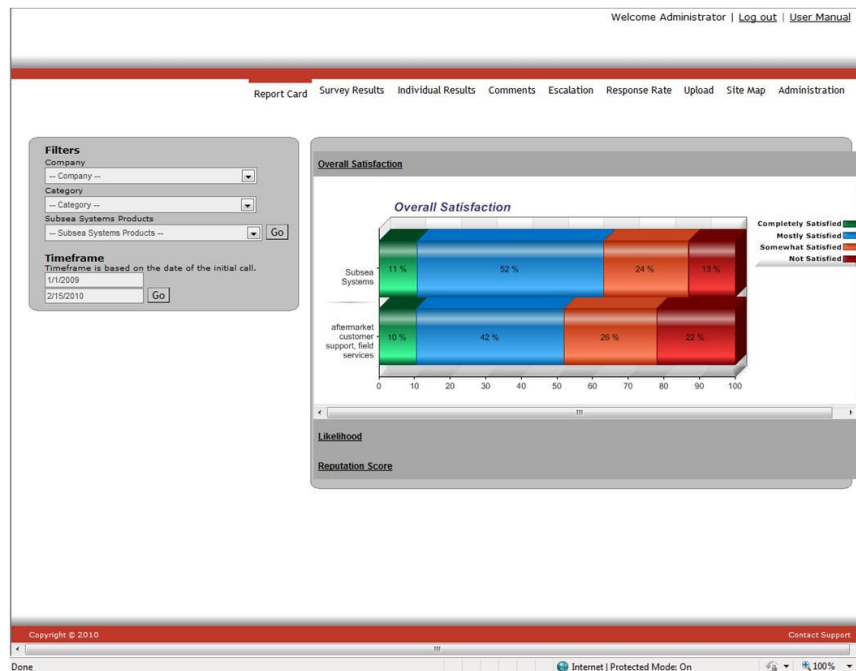
## Customer Experience Monitoring

We also offer the ability to add our Customer Experience Dashboard to your Salesforce.com system. Our Customer Experience Dashboard is Gelb's proprietary tool to measure satisfaction and identify "at-risk" customers. This assessment is used at critical points of the customer experience (often, this is identified as a need during our initial work). These brief, specific questionnaires are distributed via email and data is displayed in your system. The "at-risk" relationships are flagged in a queue for service recovery and escalated via email for immediate action. This module can be used on an unlimited basis and is supported for an annual fee.

Summary charts are created to monitor key performance indicators such as overall satisfaction, likelihood to recommend (Net Promoter Score) and reputation.

Emails are distributed directly from your Salesforce.com system with minimal effort from the sales person.

This application requires some custom programming and the licenses of third party applications.



# Customer Acquisition and Retention Systems

## About Gelb

Feeling pressure to grow revenues? Gelb Consulting Group, Inc. is a strategic marketing firm that merges analysis, strategy and technology to help clients build and sustain revenue growth.

Gelb is here to help you understand the complexities of your market to develop and implement the right strategies. We use advanced research techniques to understand your market, strategic decision frameworks to determine the best deployment of your resources, and technology to monitor your successes.

# Gelb

For over 40 years, we have worked with marketing leaders on:

- Strategic Marketing
- Brand Building
- Customer Experience Management
- Go to Market
- Product Innovation
- Trademark/Trade Dress Protection