


"10 Strategies For a Database Makeover"



Paradigm Shift!


- The days of "simple selling" are OVER
- Cold calling is the **ABSOLUTE WORST** use of your time
- You don't need more motivation to make sales calls; you need more qualified buyers
- *"When a Buyer finds you first, 80% of the buying decision is already made!" – HP Study*



14-Oct-04 Presented for City of Experts Workshop Series

Database Marketing Makeover

"There are simple answers. They're just not easy."



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10 Strategies for a Database Marketing Makeover

1. Survey Stakeholders
2. Elect a Database Administrator
3. Customize
4. Import Your World
5. Optimize
6. Segmentation
7. Score & Profile Best Customers
8. Survey Best Customers
9. Prospect
10. Create/Execute Auto-Marketing Campaigns



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Database Marketing Makeover

*"If you don't like change,
you're going to like irrelevance even
less!"*

General Eric Shinseki
Chief of Staff, U.S. Army



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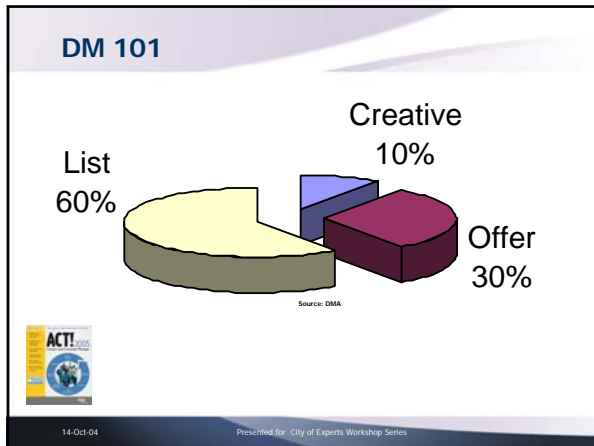
"How Can my Marketing DB Make Me \$\$\$\$?"

- A list is NOT a database
- An ACT! database is more than a combo Rolodex/Calendar
- Manage your data as if it were your company's #1 strategic asset—it is!
- Database turns company/personal goals into accomplishments
- Database marketing multiplies your effectiveness—**PARADIGM SHIFT!**



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1. Survey Stakeholders: Database Wish List

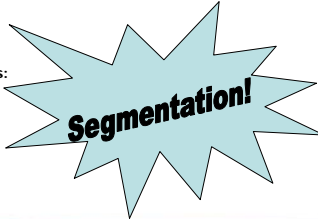
Owner / Management	<ul style="list-style-type: none"> -I want to forecast sales monthly/quarterly" -I don't want employees walking off with my database" -I want feedback from customers to improve our products"
Sales / Marketing	<ul style="list-style-type: none"> -I don't want to waste my time with prospects who will never respond" -I want a system that will tell me who is most likely to buy from me today, this week, this month" -I want to control my own personalized communications" -I want help cross-selling my customers on our other services." -I want 1 place to put customer, prospect, vendor information" -I want to set up marketing templates and always have them running in the background, whether I have time to execute them or not!"
IT	<ul style="list-style-type: none"> -I want to keep everyone's hands OFF the network" -I want a reliable backup system that isn't dependent on the users"
Administrative	<ul style="list-style-type: none"> -I want to monitor new entries for completeness (and to avoid dupes)" -I want easy ways to send lit, email, direct mail and schedule appts for multiple users"
Accounting	<ul style="list-style-type: none"> -I don't want Sales to open new accounts without a credit screening." -I don't want sales made to customers who have no open-to-buy" -I want complete contact info collected on new customers before the order is shipped."

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- 2. Elect a Database Administrator**
- Documents the "Rules of Engagement"
 - Only one allowed to change the database structure
 - Responsible for keeping the db free of dupes and junk
 - Responsible for the backup
 - Adds/deletes users and transfers record ownership
 - Acts as liaison between all Stakeholders
 - Has a thankless—but mission critical—job!
-
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3. Customize Based on Wish List

- Run current **Field Structure Report** for reference
- What fields need to be added/modified?
 - **Contact Screen:**
 - ID/Status (Ex)
 - Referred by (Ex)
 - Last Results (Ex)
 - **Sales Opportunities:**
 - Products/Types
 - Sales Stage



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4. Import Your World

- Excel
- Access
- Outlook
- PDA
- Day Planner
- Accounting records
 - Customers / Prospects/ Vendors
- Post-It Notes on your monitor!
- Business Cards (Card Scanner)

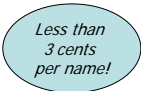


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5. Optimize It!

1. Standardize addresses
2. Key code/Source Code
3. NCOA
4. Area Code Update
5. Merge/Purge
6. "Bad Address Report" Clean Up
7. Postcard cleanup mailer



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6. Segmentation

- **Goal:** LTV
- **RFM**
 - R – Recency
 - Hotlines: Last 30-, 60-, 90-Day Buyers
 - Hotline Prospects
 - Hotline Prospects by Lead Source
 - F – Frequency
 - Inactive customers
 - M – Monetary
 - Pareto's Principle of 80/20
 - Purchasers who spent > \$\$\$
- Product-Specific Purchasers
- Networking contacts
- Email address vs. no email address
- Geography (Zip, County, State, A/C, Prefix) / Territory
- Referrals



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7. Score and Profile Your Best Customers

1. Rank:
 - a. A, B, C
 - b. Top 20% of spenders
 - c. Most profitable customers
2. How many do you have?
3. What characteristics can you clone?
 - a. *Consumers:* Age, income, home value, neighborhood, etc?
 - a. *Businesses:* Title or job function, years in business, SIC, employee size, annual *Businesses* sales, etc.



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8. Throw Out Everything You Think You Know About Why Your Customers Buy from You, and...Ask Them!

Dear [First Name],

Would you take 2 minutes to give us your opinion? Take our 9-question ACT! Feedback Survey, and we'll even reward you with a chance to win a free ACT!2005 full-day training class—a \$25 value. Thanks very much; your answers are very important to us so we can continue to impress you with our service!

[Click here](#) to take our survey

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"If you don't know where you're going, how will you know when you get there?"

• **SwiftPage Email Demo**

- Integrates seamlessly with ACT!
- Handles all opt-outs
- CAN-SPAM Compliant
- Personalization
- HTML
- Survey design
- Results compilation



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Survey Says - Metrics

• **432 Surveys Sent**

- 180 Opened (42%)
- 66 Click-Thru's
- 2 Forwards
- 97.7% of all "opens" in first 5 days
 - Day 1: 32 (18%)
 - Day 2: 119 (67%)
 - Day 3: 8 (4.5%)
 - Day 4: 9 (5%) (Saturday)
 - Day 5: 4 (2%) (Sunday)



• **33 total responses**

- 50% of Click-Thru's Completed Survey
- 18.7% of openings responded
- 7.6% of total mailed responded



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Winning Answer

"For too long we double-entered customer information into our accounting system and again in our customer management system. Now with ACT! we enter the info once and both sides are updated. ACT! also allows us to quickly view recent customer sales activity. This has become an important tool while talking with customers on the phone.

"Having ACT! means that when I speak to Lori Feldman I no longer have to hear her say to me, 'Don, you really need to get ACT! for your business. You'll thank me.'"

"And I did. She was right."



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9. Select Targeted Prospects Who Match Your Best Customers

Database Marketing Magic

Which prospects are most likely to generate profitable revenue?

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60 – 30 - 10


- Compile a “test group” from the internet before purchasing a list
- ListGrabber Demo

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10. Execute Auto-Marketing Campaigns and Track Results!

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- How do you stay on the buyers' mind until they are ready to buy...
- ...Without getting on their nerves in the process!



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10. Execute Auto-Marketing Campaigns and Track Results!


- **Networking Campaign**
 - EMAIL - 0 days Email intro
 - CALL - 7 days Follow-up Call, Offer "Tips Sheet" (Opt-In)
 - EMAIL - 14 days Email 1st Tip
 - EMAIL - 28 days Email 2nd Tip
 - EMAIL - 35 days Email "cafeteria plan" of services
 - CALL - 42 days Follow-up Call, "Did you like Tips and Cafeteria Plan?"
 - EMAIL - 49 days Email 3rd Tip
 - CALL - 56 days Voice Mail Presentation - New Info
 - CALL - 63 days Call for meeting, ask for referral, remove from sales opportunities
- *9 ACTIVITIES, 4 SALES CALLS, 1.25 HOURS OF PLANNING & CALLING TIME, SALES CYCLE OF 2 MONTHS*



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Execution Example: ACT! Auto Responder

- **Customer Care Track**
 - LETTER #1 Thank you for your business
 - CALL #1 After-sale follow up
 - LETTER #2 Cross-sell another product/service
 - EMAIL #1 Ask for referrals
 - CALL #2 Call your top 5% once per quarter and don't sell anything
 - POSTCARD #1 Thanksgiving thank you
 - CARD #2 Christmas card and/or gift
- *7 TOUCHES IN 12 MONTHS!
HOW MANY ARE YOU DOING RIGHT NOW?*



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Thank You!

*"If you always do what you've always done,
you'll always get what you've always got!"*
