

# 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**  
An Endeavor Management Company

# Customer Acquisition and Retention Systems

## Put Your Knowledge to Work

Good marketing organizations know a lot about their customers. Great ones share that knowledge effectively; equipping their sales team with the information needed to strengthen existing customer relationships, acquire new customers, and accelerate revenue growth.

To make the leap from good to great, your marketing data must add value and contribute to actions designed to further your organizational goals.

Success depends on starting with the end in mind:

- What outcome does your organization demand?
- What are the actions that will deliver the desired outcomes?

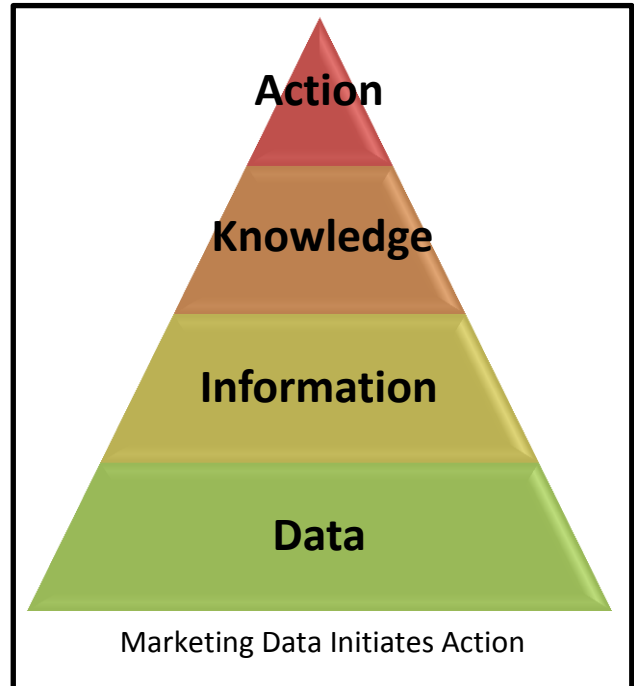
Typically, desired outcomes are to drive revenue growth or other sales targets. When marketing data is used to drive sales activities, marketing executives play a direct and **measurable** role in the sales process. Given the high volume of data and wide range of sources, effective Customer Relationship Management (CRM) tools are a necessity.

Gelb has monitored sales force effectiveness in the oilfield for over 10 years. We have found consistently that organizations that score highly in sales force effectiveness deliver the information their customers want at the time they need it. Unfortunately for most organizations, customer and technical information is located in disparate departments, does not align to the customer experience, and is inconsistently distributed.

Effective information distribution is in the remit for marketing. Today, most marketing teams focus solely on the development of collateral and persuasive communications, but there is a much more valuable role for marketing to play in support of those who interact directly with customers.

The effectiveness of the process is captured in a well-executed dashboard that gives visibility to 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

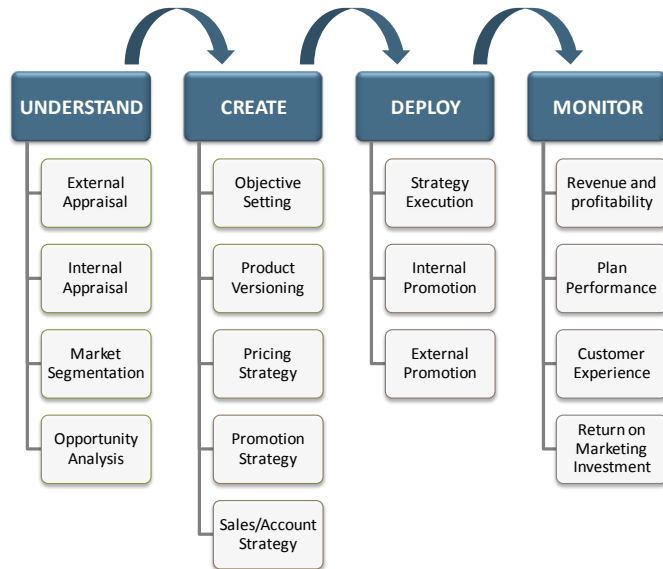


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## Process Overview

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.

Gelb has deployed Customer Experience Dashboards for oilfield service companies for the past several years. The path to maximizing sales using CRM follows our established dashboard development process. It is the cornerstone of the Monitoring phase of the PlayBook.

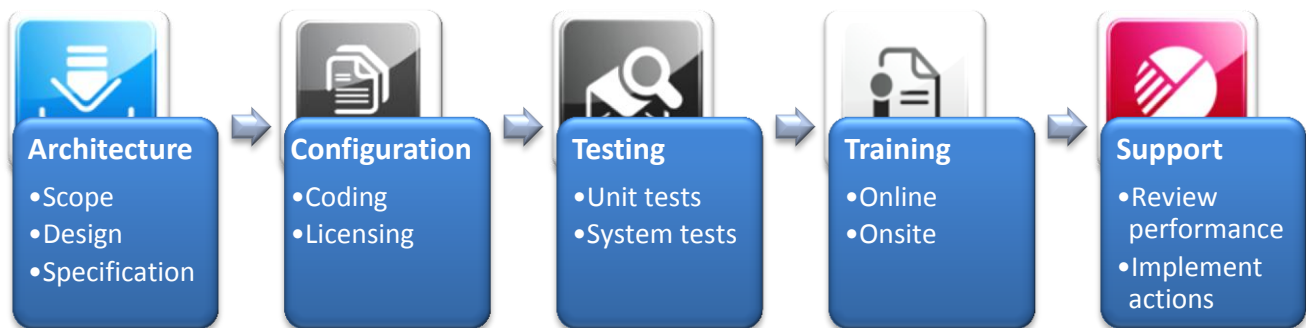


## Scope

We have found that a sufficiently narrow scope (e.g., a product line) ensures an appropriate level of customization, buy-in from key stakeholders, and adequate attention to design. This encourages early adoption of the system and efficient deployment.

## Framework

Our process is built on a framework of five key components:



A cross-functional team is critical to a successful deployment and should include representatives from strategic and technical marketing, sales management and end-user groups who can provide guidance on sales process design, training needs and functional requirements.

The team members should define critical success factors, centered on the business goals and used to prioritize requirements:

- Achievement of the desired sales targets
- Incorporation of metrics to demonstrate marketing effectiveness
- Frequency of usage among key stakeholders

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## 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
- Interviews with key stakeholders
- Materials distributed to customers at each step
- Customer segment categories

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



### Sales Process Review – Start with the end in mind

A CRM tool does not replace a process; it simply helps to manage it. If no formal sales process exists, we work with you to define it. At Gelb, we use a customer experience map to detail functional and emotional customer needs as well as touchpoints (customer interactions). This experience map is then converted into the sales process: documentation of 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 be properly defined to create separate actions, materials, touchpoints, and success measures. In the oilfield, the sales process might include some or all of the following:

- Identify Opportunity
- Generate Awareness
- Create Interest
- Solution Evaluation
- Trial
- Purchase
- Re-purchase
- After-Sales Service

Gelb bring expertise gained from working with some of the leading minds in sales process design and will work with you to define the most appropriate steps for your organization.

### Data Inventory

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We identify the information required and information available to make key strategic marketing decisions. For example:

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

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



## Analytical Plan

This where Sales & Marketing come together, where data gathered through a host of inputs becomes information, delivered via reports and dashboards to those in the organization who need it to achieve business goals.

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 process steps during which sales are lost
- Determine reasons for losing projects to key competitors
- Identify top customer technical needs
- Understand customer key buying factors

Gelb recommends creating and maintaining a “wish list” during the project for initial and long-term system configuration. We prioritize items in the list translate them 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

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How will end-users will make use of reports and input data? We document “use cases” that illustrate how profiled users gain the insight they need, including models data for sharing, security, off-site availability and mobile access.

This activity will help your team envision the final product and focus programmers on the areas that matter most. The documentation also serves as a starting point for training materials and user manuals.

## CONFIGURATION

### Technical Requirements

With functional requirements 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 strive to make the best use of existing CRM or other enterprise platforms with minor customization. The need for third party applications, and/or 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. We also personalize the interface with your graphics to ensure the look and feel matches corporate graphic standards.

### Reflecting your Sales Process

User names and roles defined in the Functional Requirements are now used to develop your hierarchy, company information, security controls and workflows. It is important at this stage to establish account owners and administration permissions.

The interface is also modified to reflect your sales process. While CRM tools provide process labels that may make sense to most consumer companies, some of the terms should be configured to reflect the idiosyncrasies of the oil and gas industry and the way business is conducted in the oilfield. For example:

- customer types (e.g., NOC, IOC, Independents)
- technical challenges (unconventional plays, HPHT, etc)
- asset location (deepwater, land, specific basins)
- 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.

These changes are small and carry low implementation cost but must not be overlooked. Using familiar terminology that aligns with existing processes and practices is essential to improve adoption.

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In contrast, CRM tools allow organizations to build product and price books for use on opportunities. Setting up and maintaining these resources is difficult when the sphere of action is broad, and is one of the reasons we recommend starting with a narrow focus.

### Effectively share Marketing information

One of the most overlooked aspects of business-to-business CRM implementations is the incorporation of key marketing information. Gelb advocates making this a priority: use your CRM to share information effectively, to tell your sales people something they don't already know.

For example, we link contact forms from your website to the database, giving a direct notification to account managers so that they can rapidly respond to their customers' questions. Similar integration with other marketing channels such as trade shows, seminars, industry and community events all help to build a comprehensive picture of customers, prospects and leads

To track sales response, we recommend including tracking and auto-response tools to ensure that users can respond quickly to inquiries and escalate or redirect as necessary.

Marketing also benefits through improved management of key messages. We organize these messages by touchpoint, each of which either drives sales or supports the sales process. An example of the organizational scheme:

Touchpoint	Message	Design
<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
<b>Website</b>		

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 usage and effectiveness of such information.

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## TESTING

One of the great reasons to take advantage of an existing CRM system is that you will be building on a core platform that has been in use for several years and that comes several years of testing. Primary CRM functions are highly reliable, connection to other enterprise systems is well proven, and custom code can be implemented very quickly.



For every component we deploy, Gelb will ensure the custom applications are functioning correctly. We employ a three-stage test methodology:

- Integration Testing
  - Verify that components function as they were designed
- Integration Testing
  - Ensure the system connects and communication with other platforms as required
- System Testing
  - Does the system deliver the desired capability to the end user?

Our tests are performed (including data quality checks) against your functional and technical requirements.

To ensure the system meets your needs, we recommend assembling a group of end users who are integral to the sales delivery or analysis process to provide meaningful feedback. 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 the wish list of future needs for prioritization and implementation.

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## TRAINING

### Change Management

Perhaps the biggest hurdle to successful deployment is resistance to change. This type of initiative requires a fundamental change to how you do business, and that change must be managed.



Internal communications are developed that prepare users, set expectations and outline the benefits of the coming change.

Critical success factors:

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

### Events

In addition to messaging, a demonstration of the value of the system is required. This should be done on-site, whenever possible. Face-to-face meetings increase the perception 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 and demonstrate how to create a lead, structure an opportunity, and utilize marketing materials.

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## 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 to respond to technical issues. When sales are on the line or sales people need further guidance on how to make best use of the system, we provide telephone and web-based and screen sharing demonstrations to ensure optimal effectiveness of the system.

As part of our annual support, we capture common issues and record them in a Frequently Asked Questions document, posted to your system. This will allow a higher degree of self-service when needed and a means to understand usage patterns and to fine-tune training as needed.

### Analytical Support

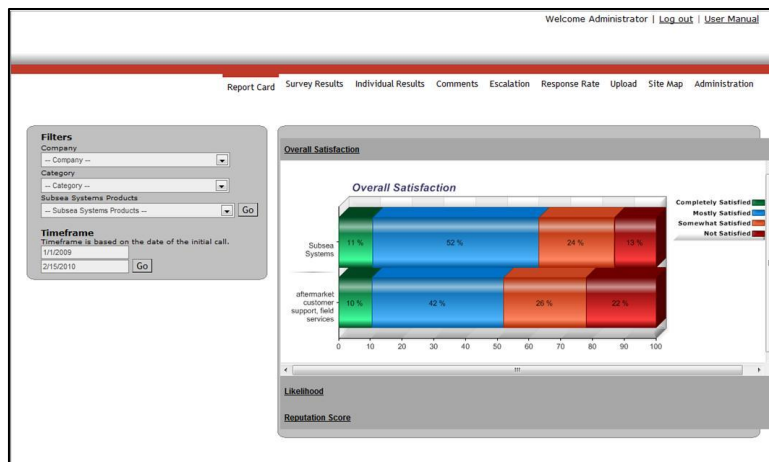
As marketing strategists, Gelb can identify key trends in your data from new product development opportunities to pricing strategy issues. On an annual basis, our analysts will produce a report using your data and our Gulf Research reports to guide your strategic marketing planning process. Our strategic marketing process (the 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 optimize your business process.

### Customer Experience Monitoring

We also offer the ability to add a Customer Experience Dashboard, 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). Brief, specific questionnaires are distributed via email direct from CRM, and data is displayed in your system.

Any "at-risk" relationships are flagged in a queue for service recovery and trigger an automatic email for **escalation and immediate action**. This module can be used on an unlimited basis and is supported for an annual fee.



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## About Endeavor

Endeavor Management, is an international management consulting firm that collaboratively works with their clients to achieve greater value from their transformational business initiatives. Endeavor serves as a catalyst by providing pragmatic methodologies and industry expertise in Transformational Strategies, Operational Excellence, Organizational Effectiveness, and Transformational Leadership.

Our clients include those responsible for:

- Business Strategy
- Marketing and Brand Strategy
- Operations
- Technology Deployment
- Strategic Human Capital
- Corporate Finance

The firm's 40 year heritage has produced a substantial portfolio of proven methodologies, deep operational insight and broad industry experience. This experience enables our team to quickly understand the dynamics of client companies and markets. Endeavor's clients span the globe and are typically leaders in their industry.

Gelb Consulting Group, a wholly owned subsidiary, monitors organizational performance and designs winning marketing strategies. Gelb helps organizations focus their marketing initiatives by fully understanding customer needs through proven strategic frameworks to guide marketing strategies, build trusted brands, deliver exceptional experiences and launch new products.

Our websites:

[www.endeavormgmt.com](http://www.endeavormgmt.com)

[www.gelbconsulting.com](http://www.gelbconsulting.com)

[www.gulfresearch.com](http://www.gulfresearch.com)