STRATEGIC MARKETING SERVICES

HAVILL
CONSULTANTS

Havill & Company

The execution of successful business plans requires accurate, unbiased market intelligence. Havill & Company has provided market-driven solutions to strategic issues facing major U.S. corporations for over a decade. Our projects have taken us throughout the United States, Canada, Europe and South America where we have conducted marketing studies in English, French, and Spanish.

Havill & Company is focused on transportation, energy, manufacturing, and technology corporations, specialized in business-to-business marketing. Growth has resulted from our solid track record of implementing sales growth and profit improvement programs for client firms. Havill & Company's current organizational structure is comprised of three business units:

MARKET RESEARCH AND CONSULTING

The services provided by our Market Research and Consulting group enable our clients to accurately measure the size, structure and occurring trends of their industry, markets and customer base. Our suite of research methodologies includes multi-client industry studies, proprietary executive interviews, focus group research, and competitive analysis projects. The Business Strategy Audit and Planning Programs convert market intelligence into an integrated marketing strategy.

MARKETING INFORMATION SERVICES

The mission of the Marketing Information Services (MIS) group is to turn data into useful business intelligence. To do this, the MIS group develops a model of our client's market based on D&B's database of 11 million businesses. MIS conducts market opportunity analysis, site analysis, database mining and modeling, and direct marketing campaign management.

RELATIONSHIP MANAGEMENT SYSTEMS

The Relationship Management Systems (RMS) group provides software solutions that enable clients to effectively manage their prospect and customer relationships. This process begins with marketing, progresses through sales, and finally closes the loop with customer service and technical support. The core value resides in the market database developed by the MIS group. The RMS group enables this database with customer relationship management (CRM) software, management reporting, training and technical support.

MARKETING & CONSULTING SERVICES

Market Research

MARKETING CHANNEL STRATEGIES & RESEARCH

❏ **Marketing channels** - In many markets, products flow to end users through a variety of channels. Each channel may involve several manufacturing or distribution steps before the final product reaches the end user. Determining and measuring the buying influences at each step is fundamental to marketing strategy development. When end users have little influence over the brand decision, "push" strategies are effective. Conversely, when the end user makes the brand decision, the product must be "pulled" through the channel. Tracking the sales volume, pricing, and margin structure of each market channel is essential to effective channel management.

❏ **Distributors** - These studies determine what our client must do to become the primary supplier to their distributor customers. We have conducted studies in a variety of markets to measure our client's distribution coverage, price point coverage, and share of distributor sales. Purchase criteria are ranked and the performance of competing suppliers are rated to determine what our client must do to increase market share at each distributor account.

❏ **Contractors** - A wide variety of studies have been undertaken to determine what contractors are looking for in the products they buy and the distributors that service them. Focus groups, personal interviews, and telephone surveys have been conducted in a variety of contractor markets. Results have guided the introduction of new products, the redesign of existing products to reduce cost, and the evaluation of distributor effectiveness in regional markets.

❏ **End users** - Personal interviews and mall intercept studies are included in this group of research programs to obtain direct end user and consumer comparisons on the features and benefits of competing products and new product concepts. This research has been conducted on a variety of products that are purchased by businesses and consumers.

MARKET POSITIONING

❏ **Market positioning studies** - New products, manufacturing cost reduction programs, annual volume discounts, increased advertising, adding distribution, improving delivery service; these are some of the options available to executives striving to improve the performance of their businesses. Frequently, these issues surface during the planning process, after a management change, or following an acquisition. Numerous studies have been conducted in a variety of industries to determine precisely how to best allocate resources. Typically, these studies involve comprehensive and exhaustive analysis of the purchase decision process throughout the marketing channel. Results not only detail new marketing programs and the benefits they will accrue, but also provide sales and marketing with specific account strategies.

❏ **Technical buying criteria** - Substitute products often represent both a market opportunity and a competitive threat to our clients. Research programs at the purchasing agent and engineering levels have identified strengths to exploit and weaknesses to overcome for our clients who market technical products.

❏ **Regional analysis of market penetration** – Frequently, there are large geographic differences in the use of substitute products. Regional market research studies have been conducted to pinpoint geographic regions of opportunity and identify key success factors for selling into these markets.

❏ **Marketing in foreign countries** - Marketing research studies have been conducted in Europe, Canada, Mexico, and South America to direct the export sales programs for domestic manufacturers. In addition to characterizing local markets, distributors have been identified as candidates to represent our client's product line.

NEW PRODUCTS

❏ **Ideation sessions** - Successful new product introductions are normally an extension of the firm's strengths in sales and marketing, manufacturing, or research and development. Ideation session have successfully identified new product concepts by generating and screening ideas from groups of professionals with diverse backgrounds in sales, marketing, manufacturing, research, and development.

❏ **Concept testing** - Marketers frequently are interested in determining how buyers will react to different marketing programs, new product concepts and cost reduction ideas that are under consideration. Mall intercepts, focus groups and personal interviews have been used to evaluate different concepts and measure the market acceptance of the selected new program.

❏ **New product opportunities** - Exploratory research, "skunk work" teams, new product committees, and engineering generate new product concepts. Two levels of market research are typically conducted. The first level evaluates the market potential of the new product concept and the second level determines the key success factors for market introduction. The scope of new product research ranges from simple market probes for screening new product ideas, to in-depth research for guiding product introduction programs and identifying target marketing channel strategies.

❏ **New product tracking studies** - Market feedback is important during the early stages of new ventures and new product introductions in order to refine the product and marketing approach. Effective new product tracking programs have been designed to monitor the level of quality and service during both test marketing and product introduction.

NEW MARKETS

❏ **New market opportunities** - New customer groups and new geographic territories represent opportunities for business expansion. A supplier's ability to penetrate new markets depends, in part, on the level of customer dissatisfaction with existing vendors and the buyer's willingness to consider new suppliers. New market opportunity studies have been conducted in a number of product categories through the United States, Canada, and South America. The scope of these studies range from simple probes for determining market potential, to in-depth research for designing market introduction programs and identifying target marketing channel strategies.

❏ **Opening new distribution channels** - Frequently, manufacturers face conflict when opening up new distribution channels to gain broader access to the marketplace. For example, products sold to the Do-It-Yourself (DIY) market through mass merchandisers and home centers may compete with products sold to contractors through distributors and dealers. We have successfully structured programs to minimize the conflict of marketing through multiple channels.

NEW FACILITIES

❏ **Service warehouse evaluations** - Many manufacturing strategies call for focused production at a single plant location to serve a national market. Regional warehouses and master distributors may be needed to improve product availability in the marketplace. Research studies have been conducted to balance distribution costs with the service needs of the market.

❏ **Plant location studies** - The justification of a new manufacturing facility requires accurate projections of the market size and growth rate in the plant service area. Plant location studies have been conducted for new facilities throughout the U.S.

DISTRIBUTION ANALYSIS

❏ **Distribution cost reduction** - Improved customer service has become a competitive weapon for many clients. To avoid costly less-than-truckload (LTL) shipments, distribution systems have been made more efficient by consolidating carriers and implementing scheduled or zone shipping programs. Our in-depth market analysis tailors the distribution system to the particular needs of the market, determines the cost savings potential of the new system, and details what must be done at each customer account to implement the new distribution system.

❏ **Distribution pricing policies** - Volume discounts, annual rebates, minimum order quantities, terms of sale, dating programs, and protected pricing programs either compliment or conflict with different distribution systems. Detailed market studies have been conducted to match our client's pricing policies with their distribution strategy.

❏ **Adding and dropping distributors** - Market share is often a direct function of distribution coverage in regional and local markets. By conducting a census survey of customers who buy from local distributors, the market performance of each distributor can be evaluated. These studies are useful for improving the effectiveness of current distributors with their local market, as well as evaluating candidates to add or drop.

PRICING STUDIES

❏ **Marketing channel competitive pricing surveys** - Pricing surveys have been conducted to evaluate new product opportunities and product line extensions. In addition, pricing studies have been conducted as part of the evaluation of building new facilities and for expanding distribution into new sales territories. Typical pricing studies include a detailed competitive analysis at each price point in the marketplace.

❏ **Pricing strategy development** - Rebate and discount pricing programs have been developed to assist clients in maintaining a stable pricing structure when selling different customers through the same distribution channel. Discount pricing schedules have also been developed to minimize conflict when selling through competing distribution channels.

MARKET COMMUNICATION EVALUATION

❏ **Benchmark studies** - Benchmark studies have been conducted prior to running new marketing campaigns. After the campaign is over, follow-up studies have been conducted to gauge the effectiveness of the marketing and sales programs. These studies have been conducted throughout the marketing channel.

❏ **Message recall studies** - Buyers have been surveyed to measure awareness and recall of our client's advertising messages. This research has been conducted to determine the effectiveness of different market communication programs.

❏ **Lead qualification programs** - Only a small percentage of the leads and inquiries that result from trade shows and advertising programs represent a short-term sales opportunity. Several programs have been developed to pre-qualify these leads so that only "hot" inquiries are turned over to the sales organization.

SALES/TERRITORY ANALYSIS

❏ **Market penetration reports** - Tracking product sales by manufacturer on a regional, state, and trade area basis is important for effective sales and marketing management. Several programs have been developed to measure brand share and forecast market opportunity for regional and local markets.

❏ **Sales territory alignment** - These studies focus on the geographic market opportunity for products sold through our client's sales force. Territories have been defined and sales offices established based on factors such as geographic coverage, call frequency, and market potential.

PACKAGING EVALUATIONS

❏ **Packaging concept testing** - Packaging can differentiate products in the marketplace, impact shipping cost, and reduce damage. In addition, bulk packaging concepts affect warehouse handling and end user convenience. Research studies have been conducted throughout the delivery system to evaluate the market acceptance of different packaging concepts.

Competitive Analysis

INDUSTRY STRUCTURE ANALYSIS

❏ **Industry structure analysis** - Frequently, executives need an assessment of how competitors are likely to react to new marketing programs that are being evaluated. On other occasions, planning data on the size, growth, profitability, and market share is needed of rival suppliers. Competing manufacturers are a rich source of industry intelligence. Studies have been conducted which provide competitive intelligence for both individual firms and the industry overall.

❏ **Competition among regional and national firms** - Many industries are made up of both large national and small regional producers. Their approach to manufacturing and marketing is often markedly different. As a result, one group typically achieves a cost leadership position while the other differentiates their product offering on the basis of quality and service. Detailed analysis of the cost structure of each industry group has been conducted to formulate long-term competitive strategy.

❏ **Import evaluation** - Because of the inherent manufacturing cost advantage of labor intensive products that are imported into the United States, imports represent both an opportunity and a competitive threat. Research studies have been conducted to assess the competitive threat from foreign companies and to evaluate the opportunity for sourcing foreign products for sale in the United States.

❏ **Acquisition studies** - Acquisitions represent a logical approach for gaining access to new distribution, achieving economies of scale, and providing brand extension opportunities for existing product lines. Evaluation of acquisition candidates requires analysis of the market, the industry, and the financial condition of the target firm. The market phase of these studies measures the size and growth of the market opportunity and the target firm's market position. The industry structure phase determines the firm's strengths and weaknesses relative to their strongest competitors. The financial phase models the firm's financial performance as a stand-alone business and as part of the client's organization. Studies have been conducted in both the United States and Canada.

COMPETITIVE INTELLIGENCE RESEARCH

❏ **Competitive product threats** - During the embryonic and growth phases of the product life cycle, several technologies often compete in the marketplace. Research has been conducted on competing technologies to determine their strengths and weaknesses as perceived by different buyer groups and to project the market growth rate for each technology.

❏ **Threat from substitute products** - Established businesses are sometimes attacked by substitute technologies. Studies have shown that new products that achieve market shares as low as 12 percent frequently replace the dominant products over time. Monitoring programs have been established to track the market penetration of substitute products for our clients.

❏ **Reverse engineering** - Formulating long-range strategy requires a clear understanding of the cost structure of rival manufacturers. This detailed analysis begins with the competitor's manufacturing cost. Reverse engineering studies have been conducted to provide a foundation for building an accurate profit and loss statement for our client's major competitors.

❏ **Implementation of intelligence networks** - Setting up an intelligence network is fundamental to a successful competitor monitoring program. Monitoring programs have been established to collect, analyze, and report competitor actions.

Business Strategy Programs

STRATEGY

❏ **Business strategy development** - Development and implementation of an effective business strategy is an organization process. Refined from practice, we have assisted our clients in adopting logical planning systems that balance long-term focus with the short-term need to achieve business objectives. Specific features include:

♦ Planning system design	♦ Strategies to combat new entrants
♦ Business evaluation	♦ Implementation work team programs
♦ Turnarounds	♦ Management training programs
♦ Shutdowns	

❏ **Business strategy audits** - Every business has a strategy, either explicit or implicit. Many strategy audits have been conducted to ensure that management has the right information to manage their businesses for profitable growth. Refined over the years, our process is both effective and efficient. Phases include:

♦ Corporate culture	♦ Internal capabilities
♦ Environmental assessment	♦ Available alternatives
♦ Competitive assessment	♦ Strategic choice
♦ Opportunity forecast	♦ Anticipated competitor reactions

❏ **Legislative impact studies** - Legislation can have a major impact on both short and long-term industry trends. Frequently, demand slows when legislation is first enacted due to confusion in the marketplace. A high level of market activity typically follows this phase as businesses move to comply with the new legislation. Legislative impact studies have been conducted, particularly in regard to EPA regulations, to provide manufacturers with industry trend information for their long-range planning activities.

❏ **Market tracking programs** - Foreign competitors, new technologies, regional manufacturers, economic cycles, and demographics all cause markets to change over time. Tracking programs have been established to provide strategic input for long-range planning and tactical data for the regional deployment of sales and marketing resources.

❏ **Five-year plan development** - Effective long-range planning requires accurate forecasting and the ability to anticipate market changes before they occur. Our approach has been to analyze each major end user segment of our client's markets so that demand shifts can be detected before they work their way back through the distribution channel. Over the years, our firm has conducted long-term structural demand studies as well as tracking programs for early identification of turning points in market demand.

PLANNING

❏ **Computerized planning models** - Computer models play an important role in making the planning process efficient and flexible. This is particularly important for consolidating plans and keeping them up to date as management revises individual programs. These computer programs have proven most useful for:
  ♦ Five-year business plans
  ♦ Capital plans
  ♦ Implementation plans

❏ **Forecasting** - Accurate market and sales forecasts are fundamental to running an efficient manufacturing organization and providing good customer service. State-of-the-art forecasting models have been developed on computer workstations. Programs include:
  ♦ Sales forecasting
  ♦ Market forecasting
  ♦ Econometric forecasting
  ♦ Regional market penetration analysis
  ♦ Channel surveys of buying intentions to predict turning points in market demand

❏ **Computer tracking programs** - Again, computer programs have proven successful in tracking market performance, especially where internal sales data must be compared with external market data. Database programs efficiently merge data for:
  ♦ Analysis of geographic market data
  ♦ Tracking market activity
  ♦ Tracking market performance

Legal Services

LITIGATION

❏ **Market research surveys** – Many business lawsuits involve disputes over markets. Frequently, after a complaint has been filed in court, each side seeks out individuals to depose that they believe will support their position. As a result, counsel must overcome opposing arguments that are based on a selective view of the marketplace. Using scientific sampling methodologies, unbiased market research studies have been conducted to support the testimony of expert witnesses. These studies have been designed in accordance with the Federal Rules of Evidence. They follow the Code of Professional Ethics, as well as Practices of the Marketing Research Association and the American Association of Public Opinion Research. All market surveys are validated by an independent, third-party market research company.

❏ **Expert witness testimony** – Lawsuits over market disputes often require expert witness testimony to support or challenge legal arguments. Reports from these expert witnesses must be thorough and complete. Expert witnesses must also have the qualifying credentials and experience required by the court. Representation is available in our areas of expertise.

Marketing Information Services

OPPORTUNITY ASSESSMENTS

❏ **Market model** – A consumption model to predict the sales potential of prospective customers is developed by applying industry statistics to demographic business data. The MIS group then develops a model of our client's market based on the D&B database of 11 million businesses. This model is enhanced with customer data, facility location information, and end user consumption volume estimates. Using statistical modeling tools, market opportunity and market share reports are provided across a variety of geographic, demographic, and volumetric variables. The resulting database of customers and prospects is the core for all other value added marketing and sales services.

❏ **Site evaluation studies** – Commercial sales opportunities vary from location to location, depending on the density of business prospects in each local market. Once the market model has been built, it is possible to develop market share estimates for each channel partner. Other factors, such as competitor presence and local market characteristics must also be considered. This study allows suppliers to allocate resources based on market potential.

❏ **Site selection assessments** - Once the factors differentiating successful and unsuccessful sites are understood, those criteria can be used to locate new facilities. Using the market model, sites under consideration are evaluated relative to market criteria known to be present at successful locations.

DATABASE DEVELOPMENT, MINING, AND MODELING

❏ **Marketing database development** – A centralized sales and marketing database is a core component to any marketing, sales, or customer service organization. Using the same market model that drives the opportunity assessment, customer and prospect records are enhanced with contact information to form a single database. This centralized marketing database is enabled with customer relationship management software to manage direct marketing and personal selling activities.

❏ **Good customer models and good customer profiles** – Good customer models are developed by first appending key demographic and geographic data elements from existing customer records. Those customer variables are then analyzed and correlated with sales volume. Highly correlated variables are isolated and compiled into a good customer model. That model is then applied to the market database in order to identify prospects that fit the same profile as your good customers.

❏ **Marketing channel models** – Similar to the methodology used to develop a good customer model, marketing channel models are based on an analysis of the relationship between customer acquisition methods (direct mail, telemarketing, personal selling, etc.) and key geographic and demographic variables among your customers. These models improve customer acquisition efficiency by ensuring that each prospect is solicited using the marketing method to which they will most likely respond.

❏ **Direct mail and telemarketing response models** - Direct mail and telemarketing efforts can be streamlined through the development of response models. Response models use historical information from previous campaigns to identify the prospects most likely to respond to a future campaign. Although similar in intent, response models differ from marketing channel models. Response models are effective in improving the success of a particular marketing method while marketing channel models lend themselves to segmenting a large universe of prospects to determine how best to reach each group.

DIRECT MARKETING CAMPAIGN MANAGEMENT

- ❏ **Direct marketing list fulfillment** – Direct mail and telemarketing campaigns that rely on commercial lists selected using anecdotal criteria frequently yield only a one to two percent response rate. Selecting records using good customer models, marketing channel models, and response models have improved response rates by 50 to 100 percent.

- ❏ **Direct marketing campaign response analysis** – By assigning promotional codes to direct marketing programs, results can be analyzed by demographic and geographic variables to determine the design and type of campaign yielding the highest response rates. These studies are useful in designing future direct marketing programs.

- ❏ **Turnkey marketing campaign management** – Many successful marketing organizations employ an integrated approach to direct marketing and personal selling. They do this because the cost and effectiveness of acquiring and retaining new customers varies by type and size of prospect. Typically, sales calls are too costly for small accounts, and large buyers respond poorly to direct marketing. To the extent that marketing is a numbers game, refining the process yields more new customers for the same marketing budget. This is the purpose of our turnkey marketing campaign management program.

Relationship Management Systems

CRM NEEDS ASSESSMENT

Companies that successfully implemented a Customer Relationship Management (CRM) system typically began with a needs assessment. Focus groups with system users are useful for uncovering both business and technical requirements. The next step is to evaluate software vendors based on the defined business and technical needs. Vendors that pass this screen are invited to demonstrate their products and submit quotations. Finally, reference checks are conducted before making a final vendor selection.

❏ **Exploratory focus groups** – Exploratory focus groups include representatives from marketing, sales, customer service, operations, and information technology. These focus group sessions define the business objectives, sales processes, customer and prospect data requirements, sales productivity tool requirements, reporting and communication needs, training, and technical support options. A thorough documentation of the required business functionality and technical specifications provide the basis for evaluating potential software vendors.

❏ **Functionality, technology, and financial comparisons** – A matrix is constructed to compare business and technical requirements to vendor capabilities. Vendor information is compiled from product brochures, Internet research, third-party financial reports and vendor interviews. From this analysis, four to six vendors are invited to demonstrate their software.

❏ **Vendor demonstrations** – CRM demonstrations are most effective when multiple vendors are evaluated using standard business scenarios. These evaluations are based on system requirements identified during the focus group sessions. Worksheets are constructed to "grade" vendors on the software's application across business function and its ease of use.

❏ **Request for quotations** – A comprehensive, well-organized request for quotation is critical for an "apples-to-apples" cost comparison among vendors. In addition to the cost of the basic software, pricing for additional modules, maintenance agreements, technical support, hardware, and integration fees must also be considered. Once the respective vendors have submitted quotations, the development of a cost matrix provides a side-by-side look at total costs associated with the product.

❏ **Vendor customer visits** – Customer visits provide a real world look at CRM software in action. Typically, a questionnaire is used to record customer satisfaction relative to their initial CRM objectives. The evaluation measures satisfaction with the selection process, implementation process, software, and vendor support. Again, a reference matrix is developed to evaluate vendors according to the customer survey.

CRM SYSTEM IMPLEMENTATION

❏ **System design workshop** – Effective CRM systems are built around key business requirements. If the CRM system does not provide clearly defined benefits to its users, the implementation will fail. The system design workshop is the critical first step to implementing a set of tools and processes that best compliment the company's business organization and practices. Over the course of two days, consultants meet with representatives from marketing, sales, customer service and operations to document business details relating to the following topics.

◆ Organizational Structure	◆ Customer Relationship Management Tools
◆ Marketing & Sales Process	◆ Management Reporting & Communication
◆ Customer Service Process	◆ Personnel Training
◆ Central Marketing & Sales Database	◆ Hardware & Software Infrastructure

Following the two-day workshop, a **System Recommendations Report** of approximately 50 pages is published. This report provides a blueprint for the system design and implementation plan.

❏ **Customer and prospect database** - A comprehensive database of prospects and customers is fundamental to marketing and sales management. Detailed information on contacts is used to develop account strategies and improve account management and planning. Database enhancements include:

- ◆ Demographic information - Business information such as SIC code, sales volume, number of employees, and years in business.
- ◆ Financial credit - Credit scores from financial ratings companies, such as D&B and Experian, are used to disqualify poor credit risks from the selling process.
- ◆ Prospect attractiveness modeling - Data mining models apply a score to each prospect according to how well they match the characteristics of good customers. This score provides a priority rating so that selling efforts focus on prospects that look like good customers.
- ◆ Geographic coding - Latitude and longitude coordinates are appended to each contact in order to map and align sales territories.

❏ **CRM software** – A critical function of marketing and sales organizations is to process information effectively. CRM software improves the speed and accuracy of information processing. Based on the selling and customer service processes documented during the design workshop, the CRM software is customized to replicate the company's best practices. There are three basic system configurations:

- ◆ Headquarter systems - Customized software is installed on a network or a stand-alone computer at the home office. Customer and prospect data, scheduling, telephoning, mailing, faxing, e-mailing, and Internet access are available to inside sales and customer service departments. Customer information from other corporate systems is integrated with the CRM system using client-server or replication technology.
- ◆ Mobile systems - This configuration employs replication technology to add mobile users to the home office system. Sales representatives and other mobile users "synchronize" with the enterprise-wide workgroup via LAN, WAN, dial-up access, or the Internet.
- ◆ Internet systems – The latest Internet technology enables remote users to access the CRM system on-line over the Internet. With little more than standard Internet access and a browser, representatives have access to the enterprise CRM system.

❏ **CRM reporting system** – Management reporting is a key CRM feature. A well-designed system allows users to input and store vital customer information. Custom reports are easily developed to extract business critical information in an organized and timely manner. As a result, strategic planning and tactical account information is readily available without any significant effort from marketing analysts, sales representatives, customer service agents, or company management. Three types of reports are typically include:

♦ Management – Market opportunity reports, sales pipeline reports, sales representative planned vs. actual activity summaries, lost opportunity reports, down volume reports, lost customer reports.

♦ Sales representative - Contact profiles, daily schedules, prospect directories, Top-100 target accounts.

♦ Customer service – Unresolved issue reports, recurring service complaint statistics.

TRAINING

❏ **User guides and job aids** - A well-documented system is vital to a successful CRM implementation. Training focuses on the tasks required to complete critical sales and customer service activities. User guides include computer screen captures and the corresponding step-by-step procedures for completing each marketing, sales, or customer service activity.

❏ **End user training** – Effective CRM training employs a three step process:

♦ Selling process – By definition, CRM automates customer relationship management processes. Accordingly, the first training step is to review these processes to ensure all users are following best practices.

♦ CRM software - The second step is to review the CRM software. Typically, both representatives and managers are provided with notebook computers that have the customized software and prospect/customer database installed. This phase of the training program teaches users how to navigate throughout their CRM system. Basic instruction includes: looking up records, recording notes, scheduling and completing activities, printing form letters and reports, etc.

♦ Selling and customer service with CRM software – The final step combines the CRM process with the CRM software. Hands-on training exercises are conducted in the form of "a day in the life of a representative," where instructors lead users through exercises in the context of everyday customer interactions.

A follow-up training session is scheduled after 30 to 60 days. This allows users to review the overall CRM process and more extensive functionality from use in the field.

TECHNICAL SUPPORT

❏ **Direct access to system engineers** – A major reason CRM systems fail is a lack of effective technical support. Recognizing this fact, clients have access to system engineers who can quickly resolves problems when they occur. Attributes of this technical support include:

♦ Telephone support - Users have direct telephone access to engineers responsible for system design and implementation. This is much more efficient than being supported by a software company who is not familiar with the company or application.

♦ FastFacts – Fax and Internet based technical support provides a valuable self-serve solution to common problems, as well as useful "how-to" instructions for frequently used functionality.

DIRECT MARKETING SUPPORT SERVICES

❏ **Lead qualification** – Pre-screening surveys offer a cost-effective solution for qualifying prospect database records. Lead qualification reduces the amount of time sales representatives spend prospecting and increases the time they spend selling. Pre-screening surveys verify name, address, telephone, and contact information. Typically, they also capture demographic information and measure interest in specific products and services. Lead qualification information is entered directly into the company's CRM database through remote synchronization or on-line via the Internet.

❏ **Direct mail** – Many companies outsource their direct mail campaigns. Relying on remote synchronization or on-line Internet access, outsourced mail campaigns can easily be generated from the CRM database. As mail pieces are dropped, history records are logged for each prospect or customer in the database. Follow-up sales calls or appointments can be automatically scheduled for the appropriate sales representative.

❏ **E-mail marketing** – E-mail campaigns take advantage of the low-cost, high-volume information channel provided by the Internet. Whether outsourced or executed internally, e-mail campaigns are driven directly from the CRM database. E-mail messages are automatically logged for each prospect or customer in the database. Follow-up sales calls or appointments can be automatically scheduled for the appropriate sales representative.

GOLDMINE® FRONTOFFICE™ CRM SOFTWARE

Havill & Company, Inc. is a Value Added Reseller (VAR) of FrontRange Solutions. Havill & Company sells their FrontOffice™ suite of products including GoldMine® Sales and Marketing and GoldMine® Service and Support.

❏ **GoldMine® FrontOffice™ 2000** – GoldMine® FrontOffice™ combines GoldMine® Sales and Marketing, GoldMine® Service and Support, and GoldMine® Management Intelligence to deliver a customer relationship management solution for small to medium-sized businesses. This fully integrated suite of products offers a centralized solution for an organization's entire customer–facing operation. GoldMine addresses the customer relationship needs of the entire organization by enabling sales and marketing teams to work in conjunction with service and support teams by sharing important account information and communicating in real time. Specific features and benefits include:

Automated sales and marketing
- ◆ Create, track, and measure campaigns that target a specific audience.
- ◆ Tailor Automated Processes to touch your prospects periodically.
- ◆ Analyze and determine which marketing programs are delivering results.

Sales opportunity management
- ◆ Use the Answer Wizard to create ad hoc reports.
- ◆ Generate sales forecasts and quotas.
- ◆ Access information instantly to make important management decisions.
- ◆ Stay current with customer issues via the Ticket Window or receive alarms on custom issues not resolved by call center representatives in a timely manner.

Advance call center management
- ◆ Respond quickly to customer needs and problems with an internal knowledge base customized for your business.
- ◆ Deliver Call Tickets to field support representatives via e-mail, fax, or pager.
- ◆ Empower support teams to effectively cross-sell and up-sell existing customers.

Key business metrics analysis
- ◆ Monitor staff activities in real-time by using business metrics you defined in the Management Intelligence module.
- ◆ Make real time adjustments at individual or departmental levels.

Internet Services

PARTNER MARKETING & SALES

Many suppliers rely on independent or company owned outlets (channel partners) to distribute products and services. These channel partners represent the supplier's front line for marketing and sales activities. Unlike supplier marketing and sales organizations, which often have Customer Relationship Management (CRM) systems and a support staff, many partner organizations lack the resources to implement and administer such systems. Still, they have the same need for marketing and sales support.

After implementing thousands of CRM solutions over the past ten years, Havill Consultants recognized that many existing marketing and sales solutions for channel partners were grossly inadequate. Typically, they were box solutions that incorporated numerous unnecessary features, but still lacked needed functionality. As a result, most were unfriendly solutions and ultimately unused.

Partner marketing and sales Internet services were developed to fill this need. Through this service, channel partners have access to a central database of prospects and customers around their outlet locations. From the website, they manage their marketing and sales activities, such as:

- ◆ Identifying market opportunities
- ◆ Aligning sales territories
- ◆ Acquiring and prioritizing leads
- ◆ Printing prospect profiles and rosters
- ◆ Setting sales follow-up dates
- ◆ Tracking the sales process
- ◆ Managing paper and electronic correspondence
- ◆ Conducting paper and electronic mass marketing campaigns
- ◆ Reporting on sales rep and outlet performance

With this service, suppliers achieve higher levels of awareness and usage through the increased marketing and sales activity of channel partners. Suppliers are also able to pass direct marketing lists and leads from advertising and trade shows directly to partners through the website, then monitor sales follow-up and partner performance.

Other supplier benefits are subtle, but strategically significant. Marketing and sales are information processing activities. Historically, suppliers have relied on their partners to manage and maintain these end-user relationships. As a result, many suppliers lack direct access to their customers and prospects. However, the trend in information processing is toward the e-mail and the Internet, where suppliers have technological and scale advantages over channel partners. Partner marketing and sales Internet services enable suppliers and partners to work together to build a robust electronic CRM solution.

❏ **e-SalesSupport.com** – e-SalesSupport.com was developed for companies selling products and services relating to commercial fleet operators. It represents the logical result of a decade of market research and client services to the transportation industry. Through a relationship with D&B, the website incorporates vehicle and business demographics for targeting commercial fleet operators. The service is scaleable from single location partners to suppliers with 20,000 or more partner outlets.

❏ **Proprietary Systems** – Since e-SalesSupport.com is fundamentally a channel partner solution, proprietary systems are built on the same core technology used in e-SalesSupport.com. Implementation begins with a design workshop to identify product and service features specific to the client. System implementation and training are coordinated through an account manager assigned to the client.

Credentials

Industries:

- Automotive
- Chemicals
- Commercial Architecture
- Commercial Fueling Facilities
- Contractor Equipment
- Credit Card Financial Leasing
- Decorating Products
- Energy
- Environmental Testing
- Flexographic Printing
- Gasoline Engines
- Grills, Diffusers, and Registers
- Hand Tools
- Health Care
- Insulation
- Light Industrial Manufacturing
- Modular Homes
- New Single Family Homes
- Overhead Doors
- Packaging
- Paint
- Petroleum Market
- Pollution Control Equipment
- Pharmaceuticals
- Plumbing Products
- Pressure Sensitive Labels
- Pumps
- Resins and Coatings
- Retail Service Stations

Clients:

- Airco Gases
- American Cyanamid
- American Petroleum Exchange
- Americhem
- Ameron
- Anderson Laboratories
- APV Crepasco, Inc.
- Archadian Corporation
- Atlantic Richfield Company
- Arizona Instrument Corp.
- Bemis Corporation
- Bennett Pump Company
- Brenntag Interchem
- BP Amoco
- Calgon Carbon
- CECO Filters
- Cenex
- Chemet Corporation
- Chevron Corp.
- Circle K
- Citgo
- Clark Refining & Marketing
- Comdata Corporation
- Commercial Fueling Network
- Daimler-Chrysler
- Danaher Corporation
- Dayco Products Inc.
- Dionex Corporation
- Donlen Corporation
- Dover Corporation
- EBW Inc.
- EMCO Electronics
- EMCO Wheaton Inc.
- Equilon/Motiva
- Exxon Co. USA
- Findley Davies Associates
- FleetCor Technologies
- Ford Motor Company
- Furon Synflex
- G.E. Capital Fleet Services
- Gilbarco Inc.
- HCH Marketing
- Honda
- Husky
- IAES
- Intelligent Controls (INCON)
- ISCO, Environmental Division
- J. J. Keller & Associates, Inc.
- Kohler Company
- Kohler de Mexico
- Label Resources
- LaRoche Industries
- Lima Register
- Liquid Container LP
- MacArthur Petroleum
- MACtac Canada LTD/LTEE
- Mallory Controls
- Mapco, Inc.
- MasterCard International
- Marley Pump
- McGean-Rohco, Inc.
- Midwest HealthCare Network
- Milcor Incorporated
- Mobil Oil Corp
- Mobile Water Technology
- Morgan Adhesives Company
- Nederman Inc.
- Nitron Chemical Corp.
- Omega Environmental, Inc.
- Omnicare, Inc.
- OPW, Inc.
- Owens-Corning Fiberglas
- Pacific Pride
- Penske Truck Leasing
- Phillips Petroleum Co.
- Pollulert Systems
- PPG Industries
- QuikTrip Corp.
- Riverside Hospital
- Rosemont Analytical, Inc.
- Saber Equipment Corp.
- Schlumberger Technologies
- Security Corporation
- Sheetz, Inc.
- Shell Chemical Company
- Shell Oil Products Company
- Shrieve Chemical
- Skyhawk Chemicals, Inc.
- Smith Fiberglass Products Inc.
- Sun Refining & Marketing
- Teleflex Incorporated
- Texaco Refining & Marketing
- The Chemical Company
- The Fiberglass Tank & Pipe Institute
- The Ryland Group
- The Sterling Faucet Group
- The Toledo Hospital
- Tokheim Corporation
- Total Petroleum, Inc.
- United States EPA
- Unocal Chemicals
- Vara International
- Veeder-Root Company
- VehiCare
- Wayne-Dresser
- Walto Truck Equipment Co.
- Welland Chemicals
- Wright Express
- Visa USA
- Xerxes Corporation