



I PADRI DEL CRM

E via verso giorni più vicini ai nostri

Albertanus


## Stan Rapp



Chairman of Engauge, a total-engagement marketing agency. Advertising Age named Rapp one of the 101 people who shaped advertising in the 20th century. He is the co-author of six books, including the best-seller *MaxiMarketing*, and his latest, *Reinventing Interactive and Direct Marketing*.




STAN RAPP



Per attirare l'attenzione e sollecitare la risposta e la curiosità del cliente mandategli un calzino solo, egli acquisterà l'altro!

Stan Rapp e Thomas Collins hanno raccolto in questo libro le 66 (più una) idee migliori sperimentate in dieci anni di consulenza in giro per il mondo: idee "incredibilmente semplici", da poter essere adattate a situazioni di marketing completamente diverse



DATABASE MARKETING

## Regalami un calzino

Ansett Airlines

Allegarono un solo calzino bianco con lo stemma del club alla lettera accattivante con cui promettevano l'invio di altri due calzini al ricevimento della quota d'iscrizione.

il risultato della promozione fu una percentuale di rinnovi davvero eccezionale: il 92%.

L'essenza dell'idea è fare appello al desiderio, umanissimo, di completezza.



## Le lamentele dei clienti...

Superquinn

dare un premio ai clienti per le lamentele

benefici?

- tiene sotto controllo il personale.
- impressiona il cliente,
- rende più gradevole la scelta dei magazzini Superquinn



## Trovare nominativi

J&J Foods

Qual è il mezzo pubblicitario più trascurato e insieme più economico? E' lo spazio pubblicitario gratuito disponibile sulla confezione del Prodotto, o all'interno della stessa.

Questionari inseriti nelle confezioni, che rispondono a tre finalità diverse:

- ottenere nome, indirizzo e altre informazioni sul cliente;
- effettuare una ricerca di mercato relativa a quel prodotto specifico (Quali altri cibi surgelati acquista?);
- chiedere l'autorizzazione all'inserimento del nome nelle liste di mailing eventualmente cedute ad altre aziende;

stimolare la risposta mediante la partecipazione a un concorso a premi.



## Cortesie particolari

Superquinn, AM.Express

Nel reparto alimentari di un negozio Superquinn, il direttore si rivolge a una delle migliori clienti e la informa che può cambiare tutti gli assegni che vuole, entro il SUO limite di fido, senza dover esibire un documento

L'American Express acquista un blocco di biglietti che riserva ai possessori della sua Gold card e poi lancia i comunicati: <<La Gold Card vi trova il posto>>.



## Comunicare efficacemente

Grassfield's

Mailing personalizzato: intercalare frasi specifiche per ogni destinatario, creando così un prodotto di comunicazione che va molto al di là del direct mail, per impatto e credibilità

Di tanto in tanto, sfruttando uno dei commessi prepara una lettera per un cliente: "Ho cercato abiti taglia 42 per Lei, e ho pensato che Le avrebbe fatto piacere sapere che n'è arrivata in negozio una nuova fornitura.

Un'azione che s'inquadra perfettamente nella strategia di attenzione e iniziativa nei confronti dei clienti, che ha consentito all'azienda Grassfield's di aumentare il fatturato del 10/20% all'anno



## Client Retention...

Grassfield's

Max Grassfield: churn rate del 20%.  
 Università di Harvard: se fosse riuscito a dimezzare questa perdita, avrebbe potuto raddoppiare i profitti.  
 Il marketing dell'invito.  
 Il sistema funziona così: i dati relativi a ogni singolo cliente vengono inseriti in un personal computer. Poi il database viene utilizzato per creare tutta una serie di promemoria, offerte, ringraziamenti e auguri personalizzati, che tengono conto delle preferenze e delle abitudini di acquisto del destinatario. Inoltre il cliente riceve lo stesso trattamento ad personam quando entra nel negozio.



## Personalizzare il rapporto...

Grassfield's

Subito dopo il primo acquisto, il nuovo cliente si vede assegnare un commesso "personale", che registra tutti i suoi dati: nome, cognome, indirizzo, numero di telefono, data di nascita, acquisti effettuati e così via;

Quest'idea è un fatto naturale per le aziende di servizi che hanno un customer service telefonico.

Un po' più costoso, forse, per l'azienda; ma un grande vantaggio competitivo.



## Conosci i tuoi clienti

Grassfield's

Indagine promozionale, che fornisce effettivamente informazioni preziose e nel contempo genera vendite.

Grassfield inviò un questionario alle mogli dei suoi clienti, offrendo un buono sconto da 10 dollari per ogni questionario reso. L'incentivo, oltre ad assicurare una quantità di risposte e quindi d'informazioni utili (che forse non avrebbe ottenuto senza di esso) produsse extra fatturati



## Far Conoscere i clienti tra loro

Fare amicizia con altri clienti, possessori o utenti dello stesso prodotto, sviluppa un maggior senso di fedeltà nei confronti dell'azienda produttrice.

L'occasione d'incontro può essere un raduno motociclistico dell'Harley-Davidson, un picnic organizzato da un concessionario di automobili, la raccolta di etichette delle minestre in scatola Campbell da parte di allievi e genitori con l'obiettivo di destinare il ricavato all'acquisto di attrezzature scolastiche.

Stando insieme, i clienti sviluppano una fedeltà alla marca sempre più forte

E adesso c'è la versione tecnologica di quest'idea.



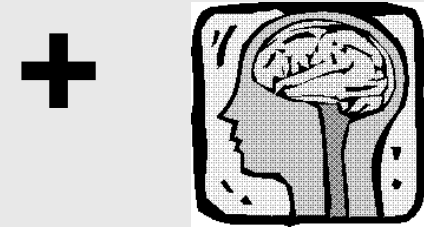
Mettetevi in tasca un database Williamson-Dickie

Sul retro di ogni etichetta di controllo inserita nella tasca dei suoi abiti da lavoro, ha stampato 14 parole che al tempo stesso fanno pubblicità al rivenditore e offrono l'invio gratuito di un catalogo.

Le risposte ottenute hanno fornito la maggior parte dei 400.000 nomi che formano il database clienti dell'azienda.



CRM: vtiger



CommtechWireless centralizes data, speeds tracking of customers and leads with CRM

**Situation**

commtechWireless faced a problem increasingly common to many companies: Too much customer information in too many places across the organization. Deployed at 4,500 sites across 53 countries, commtechWireless' products include pagers and beepers used by restaurants and health care facilities, as well as Pc-based and telephone paging applications. However, with customer information scattered across multiple databases, the company's process for tracking customers was inefficient and error-prone. Plus the company had difficulty monitoring and ensuring quick follow-up on sales leads. "With our extensive databases, keeping track of the follow up to new enquiries was just too hard before cRM," says Derek Hughes, Marketing Information Analyst.

**Solution**

After evaluating several cRM solutions, commtechWireless chose Microsoft cRM and quickly deployed the solution at its headquarters in Perth, Australia, and its u.S. subsidiary in Jacksonville, Florida.

**Benefits**

With Microsoft cRM, commtechWireless has a central repository for client data, which allows its employees to easily access, retrieve, and share customer information. In addition, because sales leads are now entered directly into Microsoft cRM, the company's marketing department can track their status and follow up quickly. Buzza states, "As the ceO of a global company, Microsoft cRM allows me to log in to all of our remote sites to get a snapshot of what's going on. We've set up the roles-based security so that I can VPN directly to a remote location and get a snapshot of what any of my business units are doing, real time, any day of the week."



Greater Twin Cities United Way save time & increase efficiency

**Situation**

If you've ever received multiple solicitations from the same charitable organization at the same time, you understand why Greater Twin cities united Way — which serves a population of 2.75 million across nine counties in the Minneapolis/St. Paul, Minnesota area — was eager to implement a more effective cRM system. The organization's legacy cRM system struggled to track pledges from its 190,000 donors. In fact, "the reality was that 90 percent of the information about what was going on with donors and donor companies was just being stored in people's heads," says Sandy clifford, Director of Market Technology and IT.

**Solution**

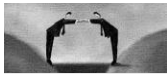
"The number one reason we chose Microsoft cRM was because it is easy to use," clifford says. "We have a large number of temporary staff and people who are loaned to us from companies just for the campaign season. So you can see that we don't have much time to bring people up to speed on how to work with a piece of software." commenting on the organization's recent upgrade from Microsoft cRM 1.2 to 3.0 clifford observes, "The upgrade was a very seamless process. It took us less than three hours."

**Benefits**

"One really big benefit of Microsoft cRM," explains clifford, "is illustrated by the fact that last year, instead of making phone calls to ask the representatives of companies how their campaigns were doing, we used Microsoft's bulk e-mail system to accomplish this project. Talk about saving time and money!" clifford continues, "Greater Twin cities united Way has been making dramatic improvements over the last three years, and Microsoft cRM has been an integral part of those changes."

"We all win with Microsoft cRM!" says clifford.





## CASE STUDY

### Roman Meal's marketing success

#### Situation

For Roman Meal company, a leading producer of quality bread, english muffins, and cereal, the need was simple: A software solution that could help it do business more efficiently. The Tacoma, Washington-based company wanted to share additional information with its franchisee bakers, put together new marketing programs, and respond more quickly to the needs of its customers. "We were looking for a way to use technology to leverage our brand even more and to keep the Roman Meal name in front of bakers, consumers, and our business partners," says Mike Berger, the company's Business Resource Manager.

#### Solution

Roman Meal evaluated virtually every CRM solution on the market before selecting Microsoft CRM. "What I saw with Microsoft CRM was more flexibility than the other CRM solutions and an ability to fit our business model," Berger says. "The other applications couldn't handle the different types of sales data we need to track." In addition, Berger explains, Roman Meal wanted to house their CRM infrastructure externally but wasn't interested in a standard hosted model. "We wanted to own the software," Berger says. "So what it came down to is that Microsoft CRM really fit our business model." Roman Meal CRM and contracted with their Microsoft partner, TriVenture, to host Microsoft CRM off site.

#### Benefits

Roman Meal implemented Microsoft CRM 1.2 last year and recently upgraded to Microsoft CRM 3.0. With it, the company is carrying out e-mail campaigns that touch its customers and reach deep into the ranks of its franchisees. "Microsoft CRM keeps the Roman Meal brand in front of everyone, instead of just a few key people," Berger says. And it's been remarkably easy to use — even for nontechnical types. "We wanted a CRM system that was easy to use, so we didn't always have to bug the IT guys," Berger explains. "I'm not an IT guy, but with Microsoft CRM I can just go in there and do most of the customizations myself."



## CASE STUDY

### Volvo Baumaschinen builds better customer service, improves marketing

#### Situation

companies that operate in highly competitive fields face a unique challenge: keeping costs competitive while ensuring high-quality customer service. That was the case for Volvo Baumaschinen Österreich GmbH, an Austria-based distributor of Volvo-branded construction equipment. The company faced difficulties finding and sharing customer information across the organization, which often led to customer-service issues. The company's need for a CRM solution was readily apparent. "We needed a system that supported the sales process and customer relations in a flexible and efficient way," says Klaus Längauer, the company's Sales and Marketing Manager.

#### Solution

Volvo discontinued using its homegrown CRM system and deployed Microsoft CRM. The results were readily apparent. "With an improved knowledge about the customer and a better and more efficient information flow from our sales force to the back office functions, we are improving our competitiveness and customer service, and saving costs due to higher efficiency," Längauer says. Managing Director, Dr. Thomas Schmitz adds, "We operate in seven countries and for cultural reasons there are slightly different business approaches in each country. This is why it's essential to have a flexible tool like Microsoft CRM to unify our database and maintain core process workflows."

#### Benefits

With its recent upgrade to Microsoft CRM 3.0, Volvo Baumaschinen benefits from enhanced marketing functionality. "We have set up a new team to develop business in special market areas, and these people are looking forward to having a tool for their letter, postcard, and e-mail campaigns," says Peter Glück, the company's IT Manager. "We think the campaign management in Microsoft CRM 3.0 fits perfectly



## CASE STUDY

### CSR Roofing improve and better quantify marketing efforts

#### Situation

Stephen Powell was tired of not being able to quantify the effectiveness of his marketing campaigns. "I get all this advertising together, create a campaign, and send it out — and never seem to get the feedback to justify what we've been doing," says Powell, the National Architectural Segment Manager at Sydney, Australia-based CSR Roofing, a division of CSR Limited. So when Powell learned that his organization was implementing Microsoft CRM 3.0, he was thrilled at the prospect of having a solution that could make his job easier. After all, Powell's job is to persuade between 3,500 and 4,000 architects to specify his roofing products in their designs.

#### Solution

In addition to being able to quantify marketing effectiveness, Microsoft CRM is replacing the company's antiquated database and paper-based processes, helping it quickly qualify and track large volumes of leads and empowering Powell to more effectively share information with his superiors. "The workflow in Microsoft CRM enables us to define and implement consistent business processes."

#### Benefits

With Microsoft CRM, CSR is increasing its marketing activities and taking control of its lead and reporting processes. Powell has been impressed with the company's new Microsoft CRM 3.0 solution. "The new version fits what we do exactly," Powell says. "It allows you to manage each campaign and track the results from it. So if we advertise in a particular magazine, we can easily monitor leads we receive, measure how much it costs to advertise there, and understand the results we got from the ad. We couldn't do that before... Microsoft CRM helps us manage our customer relationships profitably."



## CASE STUDY

### Travel Global Systems improves customer service, information

#### Situation

Getting Sales and Technical Support to collaborate is rarely easy or natural. But it's even more difficult when they're located on two different continents. That was the dilemma faced by Travel Global Systems (TGS), a fast-growing company that provides business-to-business and business-to-consumer software solutions for the travel industry. TGS' sales arm is located in the United States, while its development and technical support areas are located in Tel Aviv, Israel. "We are really one company located in two places," says Roy Eldar, IT manager at TGS. "The differences in time and location made it difficult to share information." In addition, the company's previous manual processes for tracking service requests and e-mail trails were slow and error-prone, often resulting in a poor customer experience.

#### Solution

"I used to manage all my clients through e-mail by creating rules," says Technology Director Roy Eldar. "But then I ran out of rules! I needed a more powerful system to manage my customers — that's when we purchased Microsoft CRM." Web-based Microsoft CRM enables TGS in both continents to have all of their customer information stored in one place. When the customer calls for support, in a few keystrokes TGS can access the history of this customer: what happened before, what happened last month, what happened since they joined, what kind of support they get, and what kind of service they're eligible to receive.

#### Benefits

TGS service representatives no longer need to manually search for information or send one-off e-mail requests to colleagues. "Our service people love Microsoft CRM because they are finally able to share vital information, which is critical to the success of our business," Eldar says. "For us, having a web-based CRM solution was imperative. Microsoft CRM makes it possible for us to work more cohesively as a global corporation."



## Perot Systems customizes CRM for increased customer success

### Situation

If anyone knows delivering global IT services and solutions, Perot Systems corporation does. Texas-headquartered company has grown to 18,000 associates serving more than 400 customers worldwide. Because of its significant growth, however, Perot Systems began to experience difficulties capturing, tracking, and sharing client and prospect information at an aggregate level. Perot Systems sought a cost-effective cRM solution that could help it aggregate all that information into a single database and easily handle the massive volume of customer contacts made on a daily basis.

### Solution

Perot Systems selected and installed Microsoft Dynamics cRM in under 90 days, integrated the solution with Microsoft Windows® SharePoint™ Services, and customized it to meet the company's unique information needs and business processes. "Microsoft cRM embraces our sales methodology and our sales governance," states Rick Toma, Director of Global Sales Operations. "We believe it is important for a global IT services company to retain the customer intimacy heritage established when it was smaller, while also growing its business and delivering new levels of value to its clients," says cIO Mike Mcclasky. "Microsoft cRM is a key enabler of this strategic objective for Perot Systems, as it enables us to cost effectively incorporate our best practices and methodologies, spanning people, processes, and technologies to develop new businesses and solidify our existing customer relationships."

### Benefits

"The three greatest benefits that I see our organization getting by choosing Microsoft cRM over the competition are cost effectiveness, flexibility and stability," observes Toma. "Microsoft cRM melds into Microsoft Outlook®.



## Pellerano & Herrera law firm uses CRM to deepen client relationships

### Situation

The largest law firm in the Dominican Republic, Pellerano & Herrera serves clients in 110 countries and handles more than 10,000 cases annually. Pellerano & Herrera sought a cRM solution that could help the firm retain, manage, and acquire clients more efficiently by deepening its relationships. "We have a lot of clients and a lot of cases from those clients, but we needed a cRM tool to more effectively leverage these relationships," says Annie Luna, Marketing Director.

### Solution

Because Pellerano & Herrera had standardized on a Microsoft technology platform, Microsoft cRM was the obvious choice — and, in the firm's eyes, represents a distinct competitive edge. "Microsoft cRM gives us a huge advantage over our competitors because it enables us to proactively track our clients and market our firm's services," says Luna. "Our law firm has built its success on a proactive approach to client care. Every time laws change and legislation is updated, Microsoft cRM enables us to immediately identify and advise those clients whose businesses are affected. This is how we obtain and maintain the loyalty of our clients."

### Benefits

"Before we had Microsoft cRM, every e-mail campaign was manual and frequently required hiring additional personnel for coordination," reports Luna. "Today I can quickly initiate and execute an effective targeted marketing campaign single-handedly. Microsoft cRM saves our firm a lot of overhead administrative costs."

In addition, with Microsoft cRM providing a centralized location for all client information, Pellerano & Herrera anticipates marked revenue impact. Luna explains, "Based upon our beta testing and calculations, we believe Microsoft cRM 3.0 will help to significantly increase both our number of clients and the number of cases associated with those clients." Luna continues, "This growth should be reflected in a significant revenue increase the first year — which is much larger than the percentage we normally see."



## Corillian Corporation banks on CRM for a complete view of business

### Situation

Based in Hillsboro, Oregon, corillian corporation is the market-leading provider of scalable and secure Internet banking applications that support more than 25 percent of the online banking users in the United States today. corillian had outgrown its previous legacy cRM system, which didn't work efficiently for remote employees, was difficult to customize, and required constant and expensive monitoring. "The core application was built several years ago, so it just didn't meet the needs of today," explains Greg Hughes, Director of IT and Security Operations at corillian.

### Solution

"We had a need for a cRM product that would allow us to customize, tweak, add pages, add fields, modify the user interface, do some powerful reporting — and, especially, flex with the needs of the company... Microsoft cRM is a logical, workable approach to customer relationship management," Hughes says. An additional benefit to corillian is that Microsoft cRM integrates with other systems the company relies upon. "Microsoft cRM speaks our language. Not only does it work the way that we work, but you could say it also speaks the way that we speak."

### Benefits

corillian's work force is highly mobile; Hughes appreciates the multi-faceted flexibility of Microsoft cRM. "The great thing about a Web-based cRM experience for me is that if I'm traveling and am down at the coffee shop, in a hotel room, or at the airport I can still access Microsoft cRM through a simple Web browser." An additional clear benefit of Microsoft cRM for corillian is its familiar interface, which results in eager user adoption. According to Hughes, "The integration and the user interface through Microsoft Outlook® just make Microsoft cRM another part of communicating using Outlook. It almost dissolves into Outlook so that you don't think of it as a separate function or a separate application or a separate set of processes."



## InfoMentis CRM helps boost marketing, business success

### Situation

InfoMentis, a global skills development and consulting firm based in Atlanta, Georgia, is dedicated to helping companies achieve revenue predictability and sustainability by improving their sales, service, support, and marketing effectiveness. The trouble was that InfoMentis' previous system was limiting its own marketing efforts. "It was more of a contact database versus a cRM system, and didn't have the flexibility and customization capabilities we required," says Suzanne Rabauer, InfoMentis' Director of Business Development and Marketing. As a result, the firm experienced limitations in assigning and scheduling consultants; forecasting sales; organizing and executing marketing campaigns; and managing its pipeline.

### Solution

InfoMentis sought a flexible, customizable, easy-to-use, and cost-effective cRM solution. "We really do not want, nor have the appetite for, an incredibly complex or expensive technology environment," says Rick Nichols, Principal. As a dedicated user of Microsoft technologies, InfoMentis turned to Microsoft cRM. "When we looked at Microsoft cRM, a whole new world opened up for us," Rabauer says.

### Benefits

The firm recently deployed Microsoft cRM 3.0 and has been particularly impressed with its tight integration with Microsoft Office Outlook®. "Our sales principals' daily activities and calendar are scheduled through Outlook. It's very important to them," Rabauer says. "With Microsoft cRM you really, truly can now do everything from within Outlook." Microsoft cRM 3.0 is also playing a critical role in InfoMentis' business development efforts. Using Microsoft cRM, InfoMentis is now able to create comprehensive nurture marketing programs, through which every interaction with the client or prospect is tracked and followed up on quickly. "Our clients are our business," Nichols says, "and Microsoft cRM is critical to maintaining contacts, nurturing, selling, and servicing those clients."

