

Siftwork to deliver customer loyalty and growth package to transport business

Imagine your business could bring together and exploit its scattered customer information to pinpoint new prospects, identify cross-selling opportunities, track loyalty, improve the quality of customer interactions and cut waste.

Whether you have a few dozen customers or a few million, customer intelligence is a measure of your power to access, link and analyse the contact, transaction and specialist data stored in your operational systems, including

- Marketing and sales interactions with customers and prospects
- History and forecasts of customer turnover, products and services bought, customer profitability
- Warranties, service contracts, renewals
- Purchase plans, credit limit, feedback, loyalty.

Why just imagine? Your customer and sales information systems, invoicing and other operational computer systems already store most of the data you need.

If your sales people are hampered because they can't access customer history, if your service people are compromised because they can't see who's eligible, if your strategists are uncomfortable because they can't see forecasts and repeat purchase intentions turn now to Siftwork. We'll help you with the skills and processes to expose the dispersed, inaccessible data you already have and to acquire the additional data you need.



Siftwork has been selected to deliver a tailored customer relationship management (CRM) and customer intelligence solution to an established transport business. Our client moves and stores items ranging from single envelopes to bulk product pallets. It analyses its business by five service types ranging from same day local deliveries to international transport. It has worked with thousands of customers, from eBay enthusiasts to world-scale manufacturers.

The client's headline objectives are to

- **optimise customer loyalty**
- **cross-sell service types**
- **add profitable new customers.**

Understanding what their customers need

Manufacturers, printers and other customers use transport companies to get cost-effective, documented delivery and so shorten their cash collection cycle. Nevertheless, it's hard to differentiate a commodity service like transport. Our client is often reliant on regional partners and traffic conditions for deliveries. Customer loyalty is fickle and there's a constant stream of queries and issues to resolve.

Future profit depends on customer loyalty

If a large customer defects, closes or merges our client's utilisation and profit can plunge. So our client is motivated to protect its customer base by providing high-quality, fast

service with effective, IT-enabled issue resolution. And to achieve this, everyone in the business needs a single view of customer contacts and outstanding actions.

Five service types are available: few customers buy more than two

Many customers buy other transport services from competitors. But cross-selling additional services to its current customers is a practical opportunity with low bad debt risk and low admin costs. To put this into practice, the sales and operations teams need to see a complete history of each customer's activity level and trend in each of the service types and the competitors involved.

Automating the process to turn prospects into active customers.

The business needs to identify and exploit further profitable customers. But few employees have new business skills. Documenting and standardising the new business process will make it easier to train additional staff and new recruits. Particularly, we will help the business to define the process steps and the resources (including promotional and commercial documents) required to convert prospects into customers and deploy these steps in an automated sales opportunity management tool.

Siftwork's solution offers very high value without risk or disruption.

Our solution combines consultancy, deployment of CRM and customer intelligence software and training and coaching for users and internal 'champions'. We'll use GoldMine Business Contact Manager as the CRM application, Crystal Reports for customer analysis and dashboarding of customer

intelligence and newly released integration tools to view Microsoft Outlook email messages in GoldMine. In addition, we'll use sophisticated data transformation tools to import transactional data (eg customer turnover history by service type) into GoldMine. Then every authorised employee will see information about each customer centralised in a single view. The cost of our solution could be paid by just 2 or 3 new customers. None of what we plan will change the client's operational systems or jeopardise its data. Apart from the training, which is seen as a positive investment, the customer sales and operations team will not lose any time.

Components of the Siftwork solution

- 1 Collect information about the client's objectives, information resources and priorities
- 2 Propose a series of high-return initiatives that are appropriate to the business
- 3 Recommend a customer relationship management (CRM) software application, reporting application and a complementary software tool that facilitates the import of transactional data
- 4 Project management, liaison with software suppliers and the client's own IT experts
- 5 Install and configure the CRM solution to fit the business priorities, for example by providing individual record structures for the different contact types: customer, prospect, agent, freelance driver, etc.
- 6 Enable the necessary business processes through automation
- 7 Train a 'champion' plus an administrator and the users
- 8 Provide ongoing, on-site presence to resolve issues and coach individuals.

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