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INNOVATIONS FROM THE CONVERGENCE OF
BUSINESS, MARKETING AND CREATIVE STRATEGIES
WITH LEADING TECHNOLOGY

Sales Optimization

White Paper

Automated Dynamic Integration of Marketing and Sales

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PREFACE

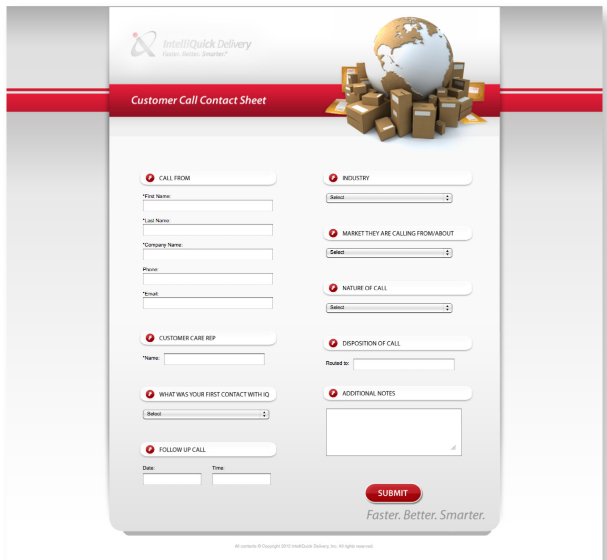
Utilizing an automated dynamic marketing and advertising methodology, top Phoenix advertising agency FabCom has been able to streamline the Southwest's leading delivery and logistics company's marketing and sales process by integrating all of the company's marketing and sales leads from their multiple sales and marketing channels. This was accomplished by developing customized sales and marketing processes into a real-time connection engine using the backbone of a commonly used CRM. This case study details their new ability to nurture leads with a series of automated dynamic marketing lead progressions and customer nurturing programs. In addition, it provides insight into a multitude of best-practice methods for sales teams to utilize to increase lead-to-account conversion rates and nurture converted accounts with a variety of dynamic segment-specific and trigger-specific drip marketing campaigns.

LEAD GENERATION

FabCom, the Southwest's leading integrated online marketing and advertising agency, began the initiative by developing and training a new process for capturing all leads who call the 888 number published universally on the company's website and on all cross-channel cross-media tactics, no matter the geographic region of the lead's origin. While the customer care reps are on the phone with the lead, they're prompted to gather specific, easily extractable information from the lead so they can complete an online "Call Log" in real time during the course of the first call. The real-time Call Log obtains all of the information necessary to populate the required fields on a lead's CRM profile. Once the Call Log is submitted by the customer care rep, the "in-field" entries dynamically enter an automated online marketing dashboard in real time that electronically notifies and aligns the appropriate corporate assets to mobilize a formal lead development process.

Simultaneously, the lead also enters the CRM system and a notification is sent to the sales manager. The sales manager can then parse the lead in real time to the appropriate sales rep who specializes in that industry or that type of business.

If a potential lead chooses not to call the 888 number, they also have the option to submit an online customer inquiry form located on the best-of-class website developed by FabCom, a Phoenix-based full service,



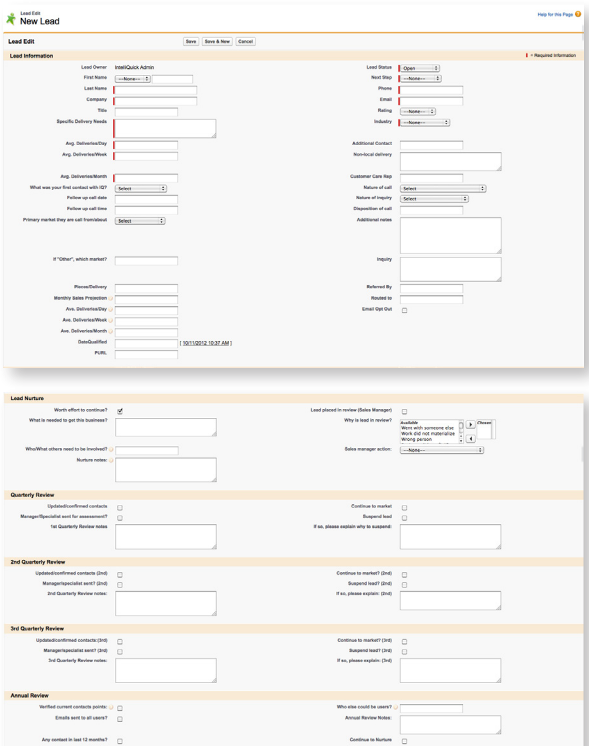
integrated marketing and advertising online agency specializing in growing businesses for over 25 years. This lead aggregation point also obtains all of the information necessary to populate the required fields on a lead's profile dynamically in the CRM.

Once the online form is submitted, it also enters an online marketing dashboard report, while simultaneously entering the sales management system.

Leads from both online and offline marketing, advertising and sales activities are auto generated into the sales CRM, auto triggering the marketing and sales processes in real-time without any human dependency, complete with sales and marketing dashboard metrics.

LEAD & ACCOUNT PROFILE CUSTOMIZATIONS

The lead profile page in the sales CRM system has been intimately customized for the client to include fields that help the sales representatives and sales manager prioritize leads through automated lead rating, lead escalation and team selling to drive conversion. For example, fields were added specific to the logistics industry including, but not limited to,



qualifying questions such as: average deliveries/day, average deliveries/week, average deliveries/month, special requirements, secondary account contacts, etc. These custom fields carry over to the account profile page once the lead is converted to an account. These custom fields help the sales representative and sales manager analyze accounts for new business opportunities within each account (expansion into other verticals, expansion into other cities, increased volumes, etc.) and are designed to be internal sales process compliance drivers and sales process benchmarks, all with embedded and integrated marketing, advertising and sales activity metrics.

While developing the sales process SOP, we developed a sales representative and manager quarterly and annual review process. This includes a review of the history of each lead to determine whether the sales representative needs to obtain more information via a phone call or on site visit, if the lead should continue to receive advertising and marketing communications, if the sales manager or another industry specialist needs to escalate the prospect to a team sale, or if the lead should be suspended from future marketing and sales efforts. Each lead's profile in the integrated CRM system has custom fields to document details from each quarterly and annual review that in turn redirect the sales process. The communication details from sales representative and customer care representative are all recorded dynamically on the lead's profile to enable continual refinement of the sales and marketing messages in real time based on event or conditional triggers. These sales and marketing messages are also dynamically generated based on a combination of hyper real-time granular messaging drivers extracted from previous sales and/or marketing activity and the prospect's interactions with previous advertising campaigns.

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HIGH IMPACT CUSTOM TEMPLATES & TRIGGER COMMUNICATIONS

Each sales representative has been empowered with a multitude of sales communications, such as email templates and letter templates specific to each of the brand's industry sectors and for each stage in the sales process coordinated to the customer's behavior or prospect life cycle. The process has been simplified to create best sales practices. After a sales representative calls a lead, he/she may wish to send a follow up email using a template that thanks them for their time and allows them to input additional information specific to what they discussed during the phone conversation. Or, perhaps the sales representative called and wasn't able to touch base with the lead. The sales representative is now trained to choose an email template, from a drop-down menu, that informs the lead they've tried to touch base, left a voicemail and hopes to talk in the next couple of days. Another email template might be used to confirm an on-site visit, schedule a pre-proposal meeting, etc.

Each of these high impact email templates auto populate the lead's information from the lead profile, as well as the sales representative's personal information in the signature. This sales and marketing activity is also aggregated in real time with previous sales, marketing and advertising campaigns to trigger the right message, at the right time, in exactly the right place (including cross media and cross channel advertising and progressive messaging).

Perhaps the rep feels they're far enough along in the sales process and would like to show the lead that they've taken the extra time to mail a letter. A series of letters, sized to be printed on the client's letterhead, that fits behavioral triggers in the sales process has been created and uploaded into the automated sales portal and are at the sales representative's disposal 24/7.

In addition, industry-specific proposal templates based on the work of the top-performing sales representative in the company have also been developed and loaded in the dynamic marketing and advertising engine for use by the entire sales team. Proposal templates for each of the six industry segments addressing both primary and secondary targets and industry-specific services have been prepared, with multiple versions of each for large, medium and small accounts. Each sales optimization tactic can be customized for specific pricing and agreements determined by the sales representative and management from the field in real time.

In addition to dynamic email templates, letter templates and proposal templates, we also focused on 360 degree sales optimization and lead nurturing by training. Each

rep is trained with the required new customer installation processes to ensure the proper sales work is completed and attached to the account's profile once the lead has been converted to an account.

Some of the new account processes and sales training include the following:

> New customer introduction process

> New customer acquisition SOP

> New customer operational/on-boarding process

> Customer sign off process

> Recurring order process

> Contract stop process

> Customer rates and pricing process

LEAD NURTURE ADVERTISING THAT RESONATES

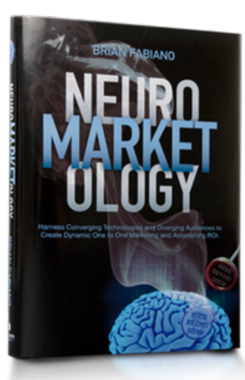
Leads for this client are nurtured with a variety of automated and dynamic advertising and marketing campaigns to increase the likelihood of converting each advertising lead to an account. The advertising campaigns are triggered throughout the entire year on a consistent basis to provide continual reminders of the brand positioning and affiliated services. The lead profile page documents the history of all campaigns, including an administrative dashboard that tracks the total marketing and advertising costs per lead.

ACCOUNT NURTURE AND RETENTION

Accounts in the sales optimization campaign are nurtured with real-time dynamic drip marketing and advertising campaigns to encourage increased use of this logistics company's services (more orders placed, expansion into other cities and into growing awareness of affiliated vertical markets, etc.). Campaigns can be triggered on an event, conditional and bi-annual promotion basis. The account profile page documents the history of that account and determines the level of messaging, imagery and hyper segmented CTAs. All campaigns sent to each account are recorded and documented by an online real time dashboard to trend results for future actions. This real-time business intelligence is then triggered as an automated prompt to company administrators and individual sales people, directly delivered to their inbox.

SALES TRAINING & OPTIMIZATION

The key to making integrated real-time marketing and advertising a success is getting the leaders and lagers in the company to accept the daily processes required to establish utilization of the program and subsequent sales optimizations. In order to accomplish compliance, we've established a series of training sessions that each sales representative is required to attend once hired by the company. The training sessions provide each employee with a history of the brand, where the brand stands today, detail on the brand's different industry segments, the goals and objectives of the company, as well as a complete tutorial on the sales process system, tools and ways to leverage the company's assets. FabCom, a full service integrated marketing agency, developed the strategy, sales and marketing content, implementation and training to ensure success.



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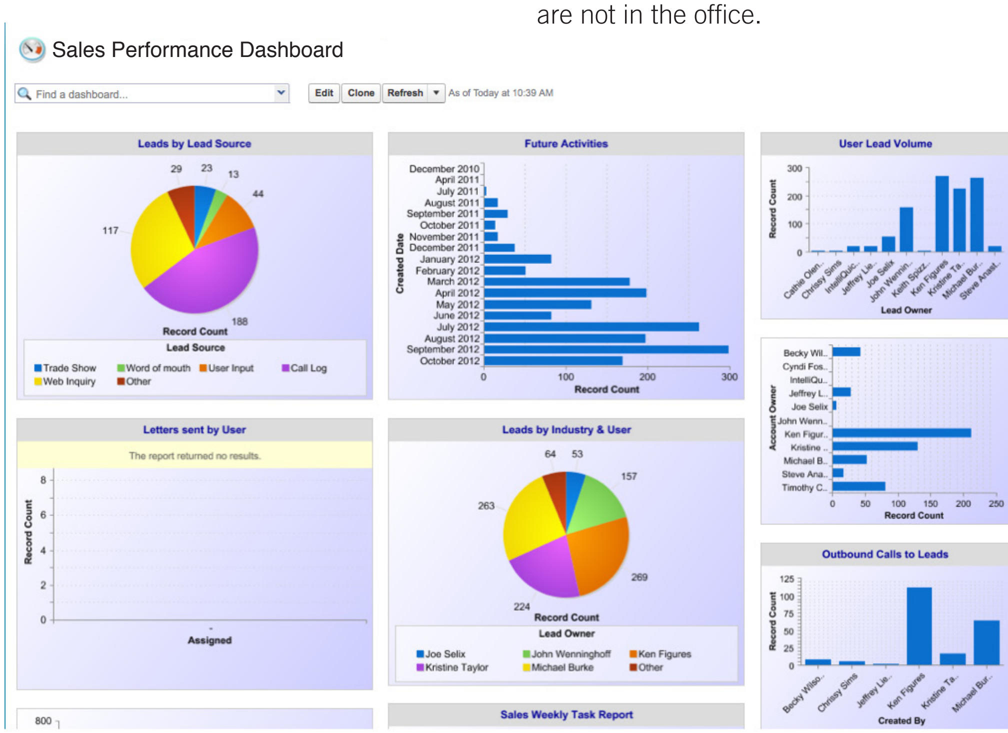
An introduction on the basic terminology is provided and everyday marketing and sales processes are demonstrated in depth. The location within the applications and use-case scenarios for the content of the various email/letter/proposal templates are reviewed, as well as all new sales and marketing optimization tools and processes. The company performance dashboard is discussed so each employee knows what areas in which they are being measured.

Each sales representative leaves the training session with a sales optimization training binder as well as online references that contain everything they need to succeed from a "how-to" guide on common tasks to copies of all email/letter/proposal templates and marketing messaging in the sales optimization program. Sales training encourages feedback from each sales representative as they utilize the sales processes so any updates and/or additions can be continually added to the system as needed.

REAL-TIME SALES AND MARKETING PERFORMANCE DASHBOARD

The company is equipped with a custom company performance dashboard containing custom reports based on what has been determined to be important measurements of success for sales activity and marketing ROI. By reviewing the dashboard, management is able to analyze where leads are coming from and in what proportions, the balance of leads for each target industry segment, how the leads and accounts are allocated and close ratios amongst the sales team. Management can also examine in real time, 24/7 from any location, the activity produced by each sales representative based on completed activities (number of proposals/emails/letters sent that week, number of outbound calls completed, number of on-site visits administered, etc.) as well as planned activities such as future scheduled tasks. Also tracked is the log in activity for each sales representative, which is beneficial for management to determine the actual hours worked by each sales representative since most are not in the office.



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SALESFORCE INTEGRATION BENEFITS

By integrating the sales process into the marketing and operational processes, the company/leadership can now:

> Track and record all incoming advertising and marketing leads

> Parse advertising and marketing leads to the sales representative most likely to close the business

> Keep a real-time sales and marketing history of all activity related to leads

> Keep a running history of all sales and marketing activity related to accounts

> Nurture the advertising lead with continued, very specific and relevant marketing touches to influence acceptance of the brand

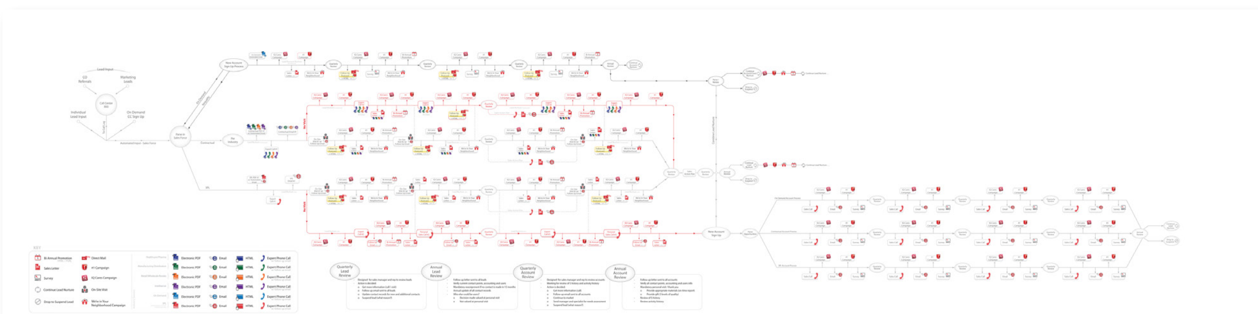
> Nurture the account with real-time automated drip marketing campaigns to reinforce the differentiation of the brand's offerings vs. its competitors

> Provide a "templated" sales process to all sales representatives based on what has worked for their top-performing sales representatives in the past

> Centrally monitor the sales, marketing and advertising activity and successes/failures of the sales representative who is geographically dispersed as well as the sales team as a whole with a sales, marketing and advertising integrated company performance dashboard

For more information on how you can close the gap that exists between your marketing, advertising and sales activity, call FabCom at 480-478-8500 or visit www.fabcomlive.com.

Sales and Marketing Integration Mapping



FABCOM IS A FULL-SERVICE STRATEGIC MARKETING, AND ADVERTISING AGENCY

Principal: Brian Fabiano
Number of Employees: 29
Local Area Billings: $30.7 Million*

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*Amortized for media billings as calculated in the Phoenix Business Journal Book of Lists.