

## *Target Marketing & Customer Relationship Management (CRM)*

### **1. Overview**

Targeted Marketing, can significantly contribute to the growth of your business. Large firms spend millions of dollars and employ highly specialized staff to perform complex market analysis activities. However, success here is not a matter of spending a lot of money or even employing sophisticated staff. It is, instead, providing staff with the tools necessary to collect and utilize customer information from your existing customer interactions.

It is no secret that the easiest sale a company can make is a repeat one to an existing customer, and the most effective marketing campaign will target customers based on their past purchasing habits and thus known interests.

More companies are realizing that their most precious asset is their customer base. A CRM solution that encompasses customer service and history sales details benefits marketing efforts by collecting current information on customers, capitalizing on opportunities to communicate key messages (during customer interactions), and providing highly targeted lists for campaigns.

One of the major characteristics of this approach is to focus on each customer's interests and interactions with the organization to deliver targeted, personal messages. This requires the company to be constantly gathering information about their customers in an effort to better serve them and, most importantly, to retain them as loyal customers. This information must be shared within the organization to encourage employees at all levels to focus on creating maximized customer value and loyalty.

As sales data and customer service information are integral aspects of running a successful marketing campaign, this section of the document has been separated into two sections for ease of reference: targeted marketing and utilizing customer service.

### **2. Targeted Marketing**

It is a common misconception that having a long list of suspect prospects will equal a large number of sales opportunities. The success rate for such prospecting blitzes is typically quite poor. This is because neither the marketing or sales team has done anything to determine the quality of this list (whether the list contains real prospects who might actually buy something).

The key is to reduce the list of prospective customers to those more likely to be converted into real customers. By supplying your sales team with a targeted list you will allow them to be more productive, by converting a higher number of targets into true sales opportunities.

This information may already be at your finger tips. Do you have information on customers past purchases? If so this is the best way to identify what will interest them again. Use this information to craft a message that reflects your business and your customer.

**© 2004-2006 Intuit Developer Network Advisory Council (IDNAC). All rights reserved.  
This article is strictly for informational/educational purposes and is not intended to be an endorsement.**

Intuit and the Intuit logo are used with permission.  
Visit us on the web at [www.idnac.org](http://www.idnac.org)

There are five simple steps you can take to help create a more targeted prospect list.

- (a) Defining targets
- (b) Defining targeted positions
- (c) Crafting emotionally driven messages
- (d) Checking list and message, and
- (e) Ensuring your message has been received.

**(a) Define your targets.**

This can be done in two main ways.

Again, do you have information on customers past purchases? If so this is the best way to identify what will interest them again. I.e. a customer who has purchased a large pair of jeans before may have an interest in a large polo shirt, but will be less interested in a medium sized mini skirt.

A second broader way is to identify the target industries. For most products there are a natural set of industries likely to need that product.

**(b) Define your targeted positions.**

There is a natural buyer within a company for most products; these can be either the position that is most likely to make the purchase decision or perhaps have a major influence on the decision maker.

Try and identify a maximum of three and remove any people from the list that do not match.

If you already have past purchase list (down to the contact) then this step becomes less important as you will already have the details of a purchases influencer.

**(c) Craft an emotional message.**

Regardless of how you intend to make first contact, the message has to be easily identified by the prospect. Try and put yourself in the shoes of the typical suspect on your list. Based on your understanding of their industry, determine the type of problem that 'keeps them awake at night' and how your product can help solve this.

**(d) Check your list and message.**

Do a real life check on both your list and message. This can be done by picking random names off the list to call and checking that they are the appropriate target audience and / or your message is effective. If not, then restart the process at step 1.

**(e) Ensure your message has been received.**

Lay the ground work by ensuring your message has been seen by the suspects at least twice. This can be done by any combination of email, letter, trade show or seminars.

Using a targeted marketing approach makes you take the trouble to research and qualify prospects. This will in turn make your direct mail campaign more effective!

**© 2004-2006 Intuit Developer Network Advisory Council (IDNAC). All rights reserved.  
This article is strictly for informational/educational purposes and is not intended to be an endorsement.**

Intuit and the Intuit logo are used with permission.  
Visit us on the web at [www.idnac.org](http://www.idnac.org)

Marketing is *not* a precise science, so the results of any actions cannot be predicted. Targeted marketing will require some experimenting to find just the right approach that works for *your* business. And if you are experimenting, it's important that you keep records of what you do and what the results were. Thus it is extremely important to be able to easily reference the results of past campaigns.

### 3. Customer Service

Customer Service Reps are often in the best position to interact with your customers. In contrast to sales calls, customer service staff is approached by the customer with queries requiring answers, not vice versa.

The gathering and use of this data is best accomplished when customer service and marketing staff share a common customer database. In many cases, marketing may want to direct customer service to gather certain types of data during a specified period of time in support of a planned marketing campaign. Because customer service can gather this information during the course of an interaction that would have occurred anyway, they can do so far less expensively than an internal or contractor's team could by making outbound calls.

This unique position can be utilized in a number of ways in your marketing efforts.

#### Support Campaign Messaging

Because customer service departments have such frequent contact with customers, they can play a key role in supporting marketing initiatives across multiple channels. In some cases, customers may call customer service with a question about a current promotion because that's the phone number they have handy. In other cases, it may be appropriate for customer service agents to inquire about an active offer at the end of an interaction that was initiated for some other reason. An example might be closing calls with a statement like, "I'm glad I could help you with that. Did you receive the coupon we just sent out for a 20 percent discount on our new product?" Information about such an offer also may be added to customer service's online self-service pages or e-mail response templates.

#### Capture Richer Data for Targeted Campaigns to Existing Customers

In addition to maintaining accurate and up-to-date contact data, customer service departments also are uniquely positioned to capture additional information about customers during their interactions. This information can include anything from software version a customer uses to the number of employees in a business. Marketing then can use this information to execute highly targeted campaigns that meet customer needs based on these specific attributes.

#### Use Events to Drive Leads

Customer service interactions don't just help your company build its customer database. They also provide an opportunity to find out if a customer has become a prospect for a particular product, service or special offer. For example, some companies set a certain threshold for support activity. Any customer who passes that threshold automatically is sent an offer for additional training or an upgraded support package.

**© 2004-2006 Intuit Developer Network Advisory Council (IDNAC). All rights reserved.  
This article is strictly for informational/educational purposes and is not intended to be an endorsement.**

Intuit and the Intuit logo are used with permission.  
Visit us on the web at [www.idnac.org](http://www.idnac.org)

## **Drive Opt-ins for Newsletters and Loyalty Programs**

One of the best ways to get a customer to opt-in to ongoing communication is to ask for permission after you've just either helped a customer solve a problem or provided some other sort of excellent service. Customer service agents who slip in a permission question at the end of an extended and successful interaction have a very high acceptance rate. Enrolment in these marketing programs can be significantly increased if customer service agents are empowered to ask the right question and make the appropriate entry in a shared database.

These are just a few of the ways we've seen marketing work more closely with customer service to augment the business impact of their campaigns. Obviously, there are more benefits, but the requirements for success are consistent in all cases. The marketing department needs to understand how customer service can help it get better information about customers, and capitalize on opportunities to communicate key messages during their frequent customer interactions.

To ensure this kind of support, marketing must provide customer service with updated information about active offers and campaigns. This includes some active offer notification right on customer service CRM application. This way, agents always will know what the active offers are, which customers are qualified for those offers, and what they should do to promote the offers to qualified prospects.

**© 2004-2006 Intuit Developer Network Advisory Council (IDNAC). All rights reserved.  
This article is strictly for informational/educational purposes and is not intended to be an endorsement.**

Intuit and the Intuit logo are used with permission.  
Visit us on the web at [www.idnac.org](http://www.idnac.org)