

## Identify a problem

How to proactively manage the marketing and communication process with prospects and customers in a small business resulting in increased sales.

## Short summary

A challenge faced by most small companies is how to capture, process and use prospect and customer data to drive sales and profitability. Small businesses often do not have the staff to respond in a timely manner to sales enquiries and to run promotional campaigns.

Within weeks of introducing a Customer Relationship Management system, the sales and service support processes were transformed resulting in increased sales, profitability, and customer service.

## Description

Exponential Training & Assessment needed to streamline the customer service process from marketing to enquiry and sale through to post purchase support and service.

The solution was to re-design its entire customer and internal communication system. The selected off-the-shelf solution was a subscription, cloud-based Customer Relationship Management and Marketing automation product called KEAP.

To maximise the benefit of innovating the company's communications process, the 'customer journey' was mapped from start to finish. The subsequent process maps enabled the automation of sales enquiries direct from the company's website into a sales and customer funnel and a customer database. Using data tags, fields and codes, KEAP is able to automatically respond to prospects and customers with personalised messages and letters. KEAP maximises efficiency enabling people to focus on more important tasks (e.g. building relationships with customers). The reporting functions enables management to monitor sales conversion rates and to create new customised marketing campaigns.

## Impact

The introduction of digital marketing and a move away from traditional paper-based marketing in 2016 required Exponential Training to re-design its marketing and promotions strategy. Once set up with automated campaigns and response sequences, the company was able to provide a 24-hour response to sales enquires and to manage the communication process.

## Lessons learned / Conclusion

Taking time to research and select the right digital solution can result in the successful innovation of a process and company's systems. The key is taking time to clearly define the needs BEFORE looking for a solution. As with any major change initiative, it also pays to take time to plan and manage the implementation of change – technology-based improvement projects often fail not because of the technology but because of people feeling displaced and unsure how to use the technology.

## References:

**KEAP - <https://keap.com>**

“Keap organizes your client information & daily work in one place, freeing you up from repetitive tasks”.