

Canada Post Action Plan

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# Are you ready?

Final chapter of our series on the rise of data management

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# Variable colour obstacles and opportunities



#### BY IOHN I FONARD

"The sweetest sound to anyone's ear is the sound of one's own name." suggesting that the fundamental act of calling other people by their name puts a person or an organization on the path to establishing a sincere relationship. The concept of Direct Marketing and Direct

Mail in particular is meant to embody this idea by communicating to people with *their* perspective in mind – creating a comfortable scenario that matters to the recipient.

Many of us understand the concept but struggle with the actual implementation aspects of creating relevant communication and therefore can shy away from the task in favour of simpler and maybe less risky methods of communicating. Direct mail in particular has been criticized for its complexity in production and "postology" and even time to market. But, to put it in simple terms, that time and effort is the investment in the relationship. Like any relationship effort and care needs to be part of the equation for both parties to enjoy the benefits. And while marketers still seek out quick-fixes that require less lead-time and less budget they may be less likely to develop true relationships where understanding and value travel in both directions. Let's explore some of the reasons, challenges and opportunities that exist in creating relevant variable colour and strong relationships.

#### CPC regulations

Long ago in Canada, promotional mail (non-first class) was called 3rd Class Mail and "Identical Printed Matter." In its initial stages what we know today as Admail was supposed to be identical. The postal system mandated that if a piece was identical, save for the recipient's name and address, it could go at the discounted rate.

During the late 90s two things changed for the better. First, the term for promotional mail was updated to "Admail" and second, and more importantly, the definition was updated allowing marketers to take advantage of data and variability. This definition can still be found today on CPC's website. Google: "When to say YES – That's Addressed Admail™." It was a decision that opened the door to fully variable content so long as the intent is the same (i.e. selling insurance is the intent, but selling house insurance to homeowners, rental insurance to renters, auto insurance to drivers).

#### **Challenges**

Today the data we have access to in order to create meaningful communication is monumental, even overwhelming. This may be a challenge marketers face in this age of information – misaligned or nonmatching data creates uncertainties about the data.

Jennifer Campbell, General Manager, Direct Marketing Strategy with Canada Post has

had numerous conversations with marketers over the years and believes that a couple of fundamental challenges face direct marketers today, especially at large organizations, around finding if they have the data and then getting at it. While these organizations are excited about the idea and what value they could bring to the relationships with customers, data is often in silos and can be difficult to access or tie together.

Possibly there is a bigger challenge, one of the fundamental disconnect between the data, production and creative camps. Maurizio Zomparelli of CAA South Central identified some of the barriers he's seen being related to getting marketing, production and data teams in the room when the brief is being created. The traditional process of marketing creating a brief then handing it off to creative then to IT and Production to execute won't yield the best results when the three disciplines are so intertwined in this digital age.

Over the last couple of decades the advancements in variable imaging technologies have been amazing. We were involved with what I believe to be one of the most advanced variable imaging programs (at the time) in the late 1990s with some 30,000 + variables being produced in grey-scale. The processing time required for that many images as well as the proofing efforts were counted in days not hours, for every run! The imagery was powerful then, what can be done today is simply breathtaking in comparison. The technology presents two challenges. The first is the timelines it takes to create these complex programs or even one-off projects and the second is the perception around colour. And of course the cost factor used to be a big hurdle for marketers.



The feedback I often receive when discussing digital variable is 'it doesn't look like offset, it looks digital'. And only clients themselves can come to grips with any trade-offs they may perceive that have to be made to provide variable relevant content.

I believe there is a mind set among many marketers that is a quest for the future, which might sometimes be at the expense of current opportunity. The race to be online may be an example. Some projections suggest that in 5 years as much as 40% of transactional mail may be electronic. While that number is huge, the corollary is that the majority (60%) in 2019 will still be via paper, so taking advantage of creating compelling communication that creates stronger relationships with customers (in this competitive landscape) is paramount both in transactional and promotional.

#### **Opportunities**

Overcoming the barriers is the most exciting part of this industry right now because it means there are many opportunities to grow as a marketer, bring more value to clients by helping them bring better communication to their customers and for those of us that are savvy, it provides a great business opportunity.

Explore a different approach to developing projects and programs that are more collaborative as opposed to linear. Zamporelli points out that he's seen the best cases for success when the internal teams involve the three aspects of a variable colour piece (data, design and production) to fit together well and even play off of each other. Engaging the vendors) quickly after

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# The good news for DM in the Canada Post Action Plan

#### BY STEVE FALK

here is good news for the DM advertising and charitable fundraising community among the mixed messages stemming from proposed changes in mail delivery. In early December, Canada Post released its Five Point Action Plan and the one dollar stamp was the breaking story. The media was quick to pronounce the end of the postal service and debate the effects of a stamp price jumping from \$0.63 to \$1.00 and the challenges that the elderly and physically challenged might have at community mail boxes (CMB's) as home delivery was phased out over five years.

#### Is mail really dead?

Canada Post still delivers about 10 billion pieces of mail each year to 15 million homes and businesses. Predictions see this dropping to 7 billion pieces in the next six years. Mail is not going away but it's well understood that its role in the multi-channel communications spectrum is shifting and the delivery logistics for an envelope are equally effective for the growing parcel business.

It is understandable that there has been some trouble interpreting the effect of this Plan on business users of Canada's Postal system. The Plan is actually good news for many readers of Direct Marketing. The rate increases for most DM-type mail did not increase more than the couple of pennies we usually expect each year. This, in effect, recognizes the importance and effectiveness of DM Admail to the mix of mail at Canada Post. DM Admail primarily uses very effective mail sorts and machineable processes to smooth delivery and increase address accuracy. It also has been a relatively stable part of the overall mail volume when there are ongoing steep drops in volume with letters and invoices and statements.

Unaddressed Admail, the flyers and coupons that come each day, play an increasingly important part of the mail mix and the price for a non-contract rate has actually dropped by a few tenths of a cent. The largest users of this service, the national brands, negotiate contracts annually so the actual rates paid by these users is not public and therefore it's difficult to say what the outcomes will be when they are newly negotiated. Maybe Canada Post can let us know?

Business Reply Mail, another highly automated part of the mail stream, plays

an important role in returning offers, subscription renewals, payments and delivering millions of dollars of gifts back to charities. The rate increases for BRM were also only a few cents, more good news.

And don't forget about the strong presence that Canada Post has in parcel delivery. With the growth of e-commerce, there has been a steady increase in demand for small parcel delivery. Canada Post covers the country and its parcel delivery service is many times larger than the nearest competitor so it sits in a good position to lever this growth area.

Pension plan funding for the staff of Canada Post is a dark cloud hanging over the good news. For years, despite making profits, the Crown Corporation under-funded pension plans. These have been a ticking time bomb and now with an aging workforce and less requirement for letter carriers, there will be negotiations with unpredictable results between Canada Post and the Unions. I'd hope that both sides understand while they sort this out how a disruption to service encourages business transactions, charity donations and e-commerce companies to explore alternative channels for delivery. We'd rather the good news continue.

STEVE FALK is president of Prime Data, an innovative and growing variable data printing company based in Aurora, Ontario. Prime Data supports direct mail campaigns offering data work, variable printing, mailing, fulfillment and digital marketing services. primedata.ca

#### Canada Post Fivepoint Action Plan

This month, Canada Post unveiled five initiatives that together will form the foundation of a new postal system. These changes will begin taking effect in the new year. This comprehensive plan can be achieved without any changes to the Canadian Postal Service Charter. The integrated plan's five main initiatives are:

#### 1. Community mailboxes

Over the next five years, the one third of Canadian households that receive their mail at their door will be converted to community mailbox delivery. The initial neighbourhoods slated for conversion in the second half of 2014 will be announced once plans are finalized. The transition is expected to take 5 years to complete on a national scale.

2. New approach to pricing Lettermail to take effect March 31, 2014
Canada Post will introduce a new tiered pricing structure for
Lettermail mailed within Canada. Under these changes, the
majority of Canadians, because they buy stamps in booklets or
coils, will pay \$0.85 per stamp. The minority of consumers who
purchase stamps one at a time, which represents an estimated 2
per cent of stamp purchases, will pay \$1 per stamp. These stamp
price changes will take effect March 31, 2014.

#### 3. Expanding convenience through postal franchises

Canada Post will strengthen its retail network by opening more franchise postal outlets in stores across Canada. The company will partner with local retail businesses that are conveniently located in the communities they serve and offer added benefits, such as better parking and longer hours.

#### $4.\ {\it Streamlining operations}$

Changes to internal operations will make for a more efficient flow of parcels and mail through the network and to the customers. These changes are driven by technology (such as faster computerized sorting equipment), consolidation (such as processing mail and parcels in a central location) and providing more delivery employees with fuel-efficient vehicles, so the same employee can deliver both mail and parcels.

#### $Addressing\,the\,cost\,of\,labour$

Canada Post is changing its business model and, as a result, will require fewer employees to serve the future needs of Canadians. With its current labour costs, Canada Post has a much higher cost structure than its competitors in the private sector have. This is simply not sustainable. The company will continue to bring the cost of labour in line with its competitors through attrition and collective bargaining over time.

# NAMMU says pricing will undermine postal future

The National Association of Major Mail Users (NAMMU) says the steep commercial increases announced by Canada Post will greatly accelerate the erosion of Transaction Mail.

NAMMU President, Kathleen Rowe, said "Transaction Mail is over 50 per cent of the revenue of Canada Post, and business is 90 per cent of that. Pricing themselves out of the business market will rapidly de-stabilize revenues the Corporation needs to support other initiatives."

Rowe noted that the NAMMU business constituency has a healthy respect for the difficult choices Canada Post needs to make but strongly believes that slowing the pace of erosion will help Canada Post achieve its longer term goals.

"Our members are challenging these rate increases for their size, the lack of the six-month formal notification period, and for completely ignoring an across the board recommendation about reasonable pricing, heard and seen at the NAMMU Town Hall meeting, and in the NAMMU MAIL 2.0 Report," said Rowe.

In conclusion, Rowe said "NAMMU will respond formally to the gazetting of the proposed general public rates, and will mount a business campaign with our members to defer and lessen these commercial increases."  $\checkmark$ 

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#### BY GEOFF LINTON

irect mail has been the workhorse in the direct marketing industry for a number of years. Whether acquisition campaigns through list rental or a mail campaign to a company's house file, direct mail delivers reliable results. Mail comes in a variety of formats and according to the DMA it generates a ROI of \$12 in revenue for every \$1 invested. Direct mail also is scalable and has a wide reach to an addressable universe. Like I said, it's reliable but that doesn't mean it can't be enhanced.

#### The multi-screen consumer

In the B2C market, consumer media habits and readership are changing. Mail is still the tactile communications vehicle that is delivered once per day. Studies prove that recipients open and read their mail but typically at their leisure and not as immediately as other mediums.

Electronic messages come at all times and are difficult to ignore. Email is the most ubiquitous vehicle. According to US data, consumers are now consuming 2x more internet content than in 2010. Internet minutes on smartphones increased 389% and even the amount of time on a PC increased 20%!

Different types of content are consumed on different devices. A recent comScore report indicates that consumers use smartphones in the early morning, computers during the day and then tablets at night.

The new digital channels allow consumers get to offers and other information directly to their smartphones, tablets and computers. But marketers need to make sure they don't bombard opt-ins with emails or SMS messages. The message content and urgency needs to considered. While eNewsletters are best read on a computer or tablet, special deals may be better as a simple eAlert. Time sensitive or important reminders are best sent via SMS.

#### Aligning with marketing's role & goals

The primary goals of marketing are to build relationships, deliver value and monetize. Leading direct marketers intimately know their addressable markets and key segments. Because mail is an upfront cost (i.e., \$1,000 CPM), direct mailers need to be disciplined and forecast how deep in the file that they should mail to in order to generate the necessary response and profit. Email marketing is highly cost efficient (\$10 CPM) so forecasting is often a minor consideration. But too much email fatigues

#### Impact on retention

Many marketers sometimes overlook the retention impact of direct campaigns. Case studies show that relevant communications have a positive effect on customer retention. In one example, a Telco client used triggered relational email messaging and achieved a +2% lift in customer retention versus control. From our experience clients who target better and deploy eNewsletters have higher engagement rates and lower inactivity rates. Mail can also have a major retention impact. One of our original clients, a mutual fund company, mailed a large format "Wealth Check" offer to a cross-section of customer segments. At the time of the mailing the stock market was not performing well so the campaign did not generate a lift in new sales. However, the mailing had a significant impact on retention. Mailing the customers a relevant piece reinforced the relationship and trust with the company and the \$200,000 mailing saved \$800,000.

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COVER STORY // T

#### Marketers should leverage email's strengths

Email is direct and immediate. Eighty percent of response comes in the first 48 hours versus weeks for mail. Email is ideal for time sensitive offers or crisis communications that need to executed. One of our CPG clients had a major recall and we were able to quickly deploy an email alert to customers (and we knew exactly how many people opened and clicked which was important to the brand).

Email campaigns only take days to design and execute (versus weeks or months for direct mail). Consider adding an email to a mail campaign if the initial mail response is low. The rule of thumb is that the follow-up reminder through email will lift response by about 50% of the original campaign. And, email is a cost efficient lift (and often gets a 40:1 ROI).

The cost efficiency of email makes it an ideal augmentation to traditional campaigns. Email is a great way to launch a new product and generate some quick traffic to the website and/or landing page. Some of our leading clients use email to test offers and copy that they hope to use in mail. Results are quick and winners become evident very quickly!

#### But the real magic happens when we bring mail and email together

Mail and email are complementary vehicles. It's just a matter of using DM common sense. Below are 6 ways that mail and email can work together.

#### 1. Use offline to drive online:

One of our clients uncovered that email opt-ins generate 30% more margin per year versus the customers they communicate through mail. Their executives gave us the green light to grow their

email permission base by 500k. How did we get these email optins? We mailed the top deciles an offer to subscribe. Knowing the LTV of an email customer enabled us to fine-tune an email subscription offer.

#### 2. Use mail postcards to re-engage email inactives:

Industry veteran Arthur Hughes says that an email address is worth \$5.00 to a B2C marketer. From our experience it can be worth 5x that. Given the substantial value of an email address, marketers should use mail to re-engage email inactives (Note: inactives haven't opened or click an email from you in 6 months).

#### 3. Integrate email with mail (two touch):

The ideal is to have email and mail work in tandem to augment each other. The pre-email can be used as a teaser with the core information sent via traditional mail. Or flip it around and have

the email sent after the initial mail piece (the email "chaser"). In both cases, the email works to lift response. Several years ago a retail fashion client did a two touch (mail & email) test versus mail only control. Coupon conversion was highest with the two touch treatment and the average spend treatment was 10% higher (incremental \$7 in revenue)

#### 4. Run dual format programs:

There are some programs that you can run in both mail and email formats. If you have email permission send them email; if not, mail them. Best Customer Programs are a natural fit for this program style and have excellent ROI. From a cost efficiency perspective you should email the best customers you have permission for and then mail the rest. The blended cost saves you money.

Years ago when I worked at Air Miles, Shell executed a highly successful store renovation program (they called it their "Retail Leadership Strategy"). The program targeted shoppers who lived in a certain radius from a Shell location that was closed temporarily for renovations. Shell mailed postcards to the shoppers and incented them to go to 2 other Shell locations. The results indicated that the mailing generated huge retention plus many customers also lifted their spend! Shell gained share of wallet through a relevant and personalized offer through two mail touches. Marketers should have pre-planned email and mail approaches to store openings or competitive blocks.

#### 5. Nurture stream:

Email is a natural vehicle to automate welcome

streams. Email is real-time and follow-up messages can be cost efficiently executed using triggers. But for high-end products a direct mail package is a prestigious and more impactful touch. Fairmont Hotels executes a top-notch relational mail program for its President's Club. Emails are used for monthly touches but major messages are done in mail format. It's a classy and in perfectly blends with their brand.

#### 6. Mail non-responders in email:

In the situation where a marketer has a critical campaign, you may want to consider doing a mail follow-up to email non-openers. Email is measurable and marketers can determine what individuals should get a mailer.

In today's world, consumers value the right information in the right format. The message format depends on their preferences and your marketing budget. Email is an ideal vehicle to touch low value customers. Email is great for simple messages but complicated services may be better served by a multiformat mail piece to fully explain the product and offer. Either vehicle works in most cases. The reality is that companies typically have email permission for only 30-50% of their customer base. So, in the meantime mail and email will co-exist for a while to come. Start working on building up your permission base and give yourself more digital options for your direct campaigns.

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**DATA ANALYTICS** 





### Taking it up a notch

Smarter marketing yields bigger return on investment

BY GERALDINE TENTER

an your organization predict the financial returns on its marketing spend? Typically, marketing decisions are made based on experience, knowledge and maybe even a hunch.

But the more technology progresses, the more crucial it is for companies to use fact-based approaches in forecasting campaign success. Rarely can this be done without investing more dollars in a campaign. Even more rarely do such approaches evolve and adapt to specific external environments – that is until now.

Marketing is on a cusp of transformation. As we move into the digital era, we see the department becoming more technology-centric in it's pursuit to target, connect and engage consumers. In fact, according to a recent Gartner report, CMOs will even surpass CIOs to be the biggest buyers of technology by 2017. To compete in this new environment, organizations require smarter marketing strategies.

The key to using technology for marketing's greatest advantage is data analytics. In this context, analytics helps organizations move from

reactive to predictive decision-making processes. New Intelligent Enterprise recently stated that organizations which utilize analytics are 2.2 times more likely to outperform industry peers. It can help detect performance patterns, formulate and test new hypotheses, make new associations, predict future outcomes and prescribe the best course of action. The truth is, analytics is not just about collecting data. It's about turning information into insight and insight into business outcomes.

#### Predicting the marketing outcome

Consider IBM Canada for example. Events are the tools of many a marketer's toolbox, providing opportunities for face-to-face interaction.

Armed with predictive analytics, we found only 60 per cent of these events garnered positive financial outcomes. Consequently, the marketing department formulated a plan that drove one-third fewer events with a third less spend and an increased yield of 36 per cent.

Using science and analytics, we collected data derived from historic and regional details. Ultimately, this information presented each campaign

with the "right" number of executable events, the appropriate geographic locations of these activities, and the expected financial impact. Each campaign has its own separate and unique model, built to anticipate, control, and react to specific external factors. This gave us control to compose different scenarios while changing variables such as event size, type, location and number of attendees. In addition, data analytics allows our teams to predict whether or not an event will drive positive investment yield.

Certainly, building tools is easy – the challenge becomes adopting them.
Based on IBM's experience, three learnings emerged that help improve processes and successfully adopt a smarter approach to marketing:

- 1. Formalize the approach: New decision-making processes takes cooperation across all levels of a company. Processes need to be redefined and model developments need to include evidence of marketing results, good or bad. We found that defining where and how specific tools fit within the plan, outlining team member responsibilities, identifying goals and monitoring output helped us successfully structure our approaches.
- 2. Create an iterative (not static) approach: It is important to recognize that approaches must be flexible. Just as technology continues to transform and improve, so too should model development. Models are iterative in how they are planned, developed and refreshed. We applied this principle to our marketing plans. In the past, it may have been acceptable for us to include a definitive "end" to our campaigns to confirm when the planning process was complete. But today, we learn and grow based on the data we collect. A plan never really ends; rather, it changes and is required to be continuously evaluated and refined. The more new data is collected, the more old methods become obsolete and need to be replaced, turning the planning process into a holistic cycle.

3. Focus on skills, culture & leadership: In some cases, creating new approaches using an abundance of data can spawn internal roadblocks. In lieu of this, marketers must be prepared to create a strong case for change in order to acquire executive and organization approval.

A key consideration here is to build employee skills that help drive the business. The more they learn how to use technology, the better we are at understanding its information. Training not only progresses data comprehension, but also it greatly improves how staff turns this data into meaningful work.

Changing plans and skills produces a new environment for teams to interact in. It is this transformation that builds a new culture for organizations to strive towards. With our experience, culture played a critical role within the decision-making process. Internal ideologies needed to shift so that teams were more accepting of new procedures and interestingly, it was management that helped them get there. Accepting a new culture ultimately affects when and how people adopt new tools, the way they approach the planning process and the way they acquire and develop skills.

Until new processes become second nature, management needs to continuously encourage employees. Leadership helped steer decisions and assisted teams to communicate if data was used to its greatest potential.

Without question, the value of marketing lies in its power to improve corporate outcomes. In today's business climate, organizations are facing more pressure to accomplish work faster and more efficiently. But adopting new tools and technology means we need to be ready to make internal changes. Collecting data is just one step towards smarter marketing; creating a structured strategy to uncover insights that drive action and results, is quite another.

**GERALDINE TENTEN** is director of marketing and communications for IBM in Canada.



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# Bringing back-end operations to front of mind

#### BY KAREN D'ANDREA

Ithough the front-end sales experience such as social and digital communications, in-store kiosks and direct mail are important, it's equally integral for retailers to focus on back-end capabilities. Therefore, many retailers are looking at omnichannel fulfillment, which creates new opportunities and challenges for retailers and distribution partners.

Consumers today expect more from their retailers. No longer are they restricted to in-store merchandise and in-store hours. E-commerce and the endless aisle provide choice, flexibility and convenience, which in-turn has raised consumer standards of what they expect to see from retailers. If a consumer can't find a product they are looking for instantly, they will look elsewhere, putting increased pressure on retailers to perform. If a retailer can't deliver in the timeframe required, the consumer will shop around until they do find the product with the delivery that meets their needs.

This new dynamic has shifted how retailers manage their inventory and deliver their merchandise. The days of centralized shipping, where logistics were planned in advance and handled through specialized fulfillment centres are changing. Today's experience looks very different; stores need to take a customized approach by managing both more and smaller shipments at more locations to meet customer schedules and preferences.

Stores are no longer simply a sales channel; they are a key part of the shipping and logistics network. Successful retailers are offering advanced fulfillment options, such as in-store pick up, store-to-store delivery and direct-to-consumer shipping. However these additions are costly. The disparate delivery processes require added time and adequately trained sales staff when it comes to logistics management within each store location to successfully launch this type of delivery program. Despite these challenges, there are ways to ensure successful and effective omnichannel fulfillment, and it starts with a robust inventory management system. Once a sale is secured, execution is key, which is why so many retailers and distribution partners are looking at new ways to approach shipping and parcel management.

#### 7 essential components

Retailers are increasingly choosing to simplify shipping operations with a single-automated multi-carrier shipping management system that enables store-to-store and store-to-customer shipping. This helps retailers achieve cost savings that could have a significant impact on overall revenue.

As retailers are looking to implement omni-channel fulfillment, there are seven points that should be considered:

- 1. Ease: The shipping system used at individual locations should be simple and easy to utilize. As in-store shipping is not generally run by experienced logistics professionals, the ease of use is critical to success.
- 2. Proper Training: Training goes beyond technology. Sales associates need to embrace the endless aisle and online components of the retail store, and understand that virtual

- customers are equally important as in-store customers. Sales associates should have a clear understanding on the importance of shipping and online customer experience.
- 3. Selection: Retailers need to provide customers with pick-up and delivery options that meet their schedules. This will help retailers attract new clientele while satisfying current, loyal shoppers.
- 4. Cost Management: It's important for retailers to keep shipping costs as low as possible. A system that provides access to multiple carriers can help ensure that is the case.
- 5. Visibility: Retailers today may be utilizing stand-alone platforms which can limit enterprise management. In order for retailers to manage workflow and negotiate favourable pricing, it's important for them to have visibility into the full range of shipping activities and options enterprise-wide.
- 6. Scalability: An ideal shipping platform should support individual stores as well as a centralized warehouse. It's important for

- retailers to choose a system that has the option to expand, as many retailers are choosing to pilot on-site fulfillment in a few locations with intention of rolling out across the country if seen as successful.
- 7. Integration: As shipping is only one component of omni-channel fulfillment, integration into other systems, including inventory management, order processing or routing optimization is required for full visibility and end to end process management.

Retailers need to implement an omnichannel fulfillment approach in order to stay competitive and successful. It's important for retailers to remember that getting the order is only the first part. In order to keep customers happy and coming back to your store, the backend fulfillment process needs to be at the front of mind.

KAREN D'ANDREA is the Director, Shipping and Logistics Solutions and Services at Pitney Bowes. She can be reached at karen.dandrea@pb.com



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# Are you ready?

# In a data-enabled marketing world, instituting marketing data management and governance is now an essential function for marketing executives.

The following is the final of a three part series on the rise of Data Management as a core marketing function. The series delves into why Marketers should adopt a more formalized approach to managing their data; methods to implement their solution and finally the key success metrics and best practice learnings. As this topic is a new and emerging area for Marketers, we encourage you to join in the discussion, add detail to the context, and most importantly begin the dialogue within your marketing teams as to how you are going to take on a more engaged role in this critical data-enabled marketing world.. BY PAUL TYNDALL, ALEXIS ZAMKOW AND JAN KESTLE



### **PART 3:** Stories from the trenches and proving its worth

The development of Data Governance principles can start from various places within an organization as well as being influenced by both market and business needs. Through interviews with experts in the trenches, we have uncovered three unique situations that influenced the development of Data Governance in the marketing function of organizations.

#### Starting within IT and building Data Governance enterprise wide

For Canadian Tire, leveraging data to understand their customers and communities is a core competitive advantage, and for technology and analytics to play a stronger role, they recognized the need for stronger governance. "Our efforts around data stewardship really started from within IT but they recognized their success depended on business involvement" shared Ed Unrau, Manager Customer Information. Success in

creating broad adoption required these efforts to expand to all business units in CTC. Over the years various functions within CTC have adopted stronger Data Governance roles to address specific business needs including Credit Risk, Customer Analytics and now Marketing.

Sharing a centralized view of the customer, no matter where the data originates, is a challenge that CTC has been mindful of addressing through Governance principles. "It's a broad area, so breaking it down and focus on business benefit is key", shared Ed. "Key aspects of Data Governance include data definition, quality, integration, security and compliance. Improving Analytics Governance helps to reduce duplication of effort, inconsistent or incorrect results. We have also introduced Enterprise level Customer Contact Governance to improve our relevancy to customers, optimize the value of our contacts across the Enterprise, and above all, to ensure we respect customer's privacy and preferences". Through adoption of these principles across lines of business, CTC is now seeing the business benefits. Customers also see the benefits of CTC's customer integration and data efforts through marketing solutions that deliver easy, relevant and more entertaining interactions that drive customer loyalty and immediate customer value.

#### Data Governance as a Product Requirement expands to others

At Canada Post, a pressing need for strong Data Governance arose through the strategic imperative to deliver value to marketers through the development of data products and services. "We built a business framework to leverage large quantities of internal data,

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external partnerships and transformed data elements to create unique and customized products for marketers" shared Alexis Zamkow, GM Data Governance. Developing a complex view of addressing across business, consumer and physical location dimensions, enriched with behaviour and profile data required a sophisticated Governance mode. For each of our list, licensing and targeting solutions we factored in the unique aspects of the operational data as well as building out use cases and access rules that respect the requirements of third party partners and recognize their contribution to the solutions. "We made sure that every data element included in our data asset had a stringent documentation history, usage rights, access terms and refresh schedules" shared Alexis. The teams are continually updating the asset with new variables, so having a very clear and defined process for new data elements is critical for our team.

When we started the governance initiative, gaining support from legal and privacy teams was a critical success requirement in the early days, and these stakeholders continue to participate actively with all new product and service launches as well as participating in policy development and oversight. Over time, as the use of the data asset grew beyond products and services for customers into supporting internal marketing efforts, thus the Governance function has expanded to include a wider audience and marketing is a key user. As data is a central driver to both Canada Post's logistics capabilities, and now customer and address intelligence, there is a true passion and commitment for Data Governance at both the executive and management levels within the organization.

#### Marketing lead Data Governance influenced by a major event

For a Major US Apparel retailer data was a critical function for marketing and was collected at both Point of Sales and through their loyalty program. Their motivation to take on active Data Governance was influenced by a data breach in which their servers were hacked and all customer data, including credit card numbers, was stolen. The incident received major coverage in the press, which had a direct impact on marketing. "In response to this breach, there was a view from privacy and security that data collection should be reduced, which would have dramatically impacted the marketing team" shared the VP of Marketing. To address this issue, marketing establishing a Data Governance function to support the needs of all parties, and thus allowed them to continue to collect the critical information needed to drive their programs. "We're regulated now," shared the VP of Marketing, "but we're highly cautious of our data and security and privacy. It's the number one priority in this

department – we're hyper cautious and we definitely could be doing so much more but we're happy right now that we have anything at all "

Going forward, this retailer is going down the path of using technology to solve the security issue and while still allowing flexibility to capture data and drive marketing: "We need technology to appease everybody. If there's a way to accomplish my objectives by getting more info into the database and analyzing the behavior but that also passes through the privacy and security team, that's a win for me". As part of the marketing team's formalized Data Governance function, they are fully engaged with the privacy and security teams on new data collection points and new data element included in the customer files.

#### Proving the benefits of Governance- you can start small

No matter how Data Governance starts the ultimate benefits align around the core principles of business success. When Governance principles are applied across the enterprise, there should be measurable impacts to operational savings, enhanced customer and market insights, reduced privacy/legal risks and improved marketing, sales and product functions.

Specifically for marketing there are both strategic and tactical benefits. In a recent study in the US sponsored by the DMA and Winterberry, when marketers were asked how they strategically benefited from a Governance function they stated in order of priority: Having the ability to use data to drive value; minimizing the threat of data leakage; minimizing the threat of a security breach; improving the quality of data driven insights; and a more secure customer experience.

As you consider building your business case, don't be afraid to think small at first, leverage market dynamics to support your efforts, and develop tangible examples of benefits at a tactical departmental level – reduced rework of files, improved speed to access records, reduced duplication of contacts etc. Small changes, when aggregated together can present measurable financial benefits, and improved employee satisfaction as well

As increased use of data in marketing is here to stay, your efforts should present real-time impacts. With Big Data comes big responsibility, but also big benefits. The time to start is now!

PAUL TYNDALL, RBC Royal Bank, Client Knowledge & Insights, ALEXIS ZAMKOW, General Manager, Data and Targeting Services, Canada Post and JAN KESTLE, President, Environics Analytics are members of the Canadian Marketing Association's Customer Insights & Analytics Council.

#### Results from a Data Governance Survey

**BY JAN KESTLI** 

With the increasing focus on Big Data and business intelligence, marketers know their companies must implement clear and cogent policies governing how they collect, maintain and use customer data. But having formal processes in place—such as data governance committees and employee access monitors—often depends on the size and sector of the organization, according to a recent survey by Environics Analytics of their clients.

Smaller organizations are less likely to have formal data governance structures. Too often, these are limited policies, and data owners fall back on government regulations developed for other purposes. One Toronto-based university lacks a data governance council, but it does operate a privacy office to ensure that its collection of credit card data remains in compliance with PCI (Payment Card Industry Data Security Standard). A commercial real estate developer requires its employees to sign a code of conduct to ensure that they adhere to government regulations concerning customer data—rules involving data access that are enforced by an operations department.

Larger organizations tend to adopt more structured data governance procedures and policies to manage their terabytes of data. A travel organization's data governance committee meets quarterly to deal with privacy, regulatory, data quality and marketing issues while their Data Steward controls the access to various customer databases. A telecommunications company operates several internal groups that focus on regulatory affairs, security and internal audits in order to comply with strict legislation and regulations. In addition, the company has a Corporate Security office that maintains rigorous policies determining which employees can access customer data.

Since data governance is an emerging field, the survey revealed a wide divergence in practices. A multinational insurance company has no internal department or group established to oversee the accuracy or flow of the data it collects. An entertainment company has a department to handle privacy and security requirements, but does not have a formal data governance council, committee or data steward; the company adheres to provincial information privacy regulations—essentially complying with the legally required minimum standards.

Nearly all the surveyed companies indicated that they face challenges in data governance—and expressed similar concerns, among them:

- ✓ managing fragmented data from older legacy systems and multiple offices
- √ assessing the constantly changing risks to customer data
- $\checkmark$  securing the endorsement of senior management to handle data governance
- ✓ trying to control data threats outside the immediate organization

Despite these challenges, nearly all the survey respondents recognize the growing importance of the data governance issue—and the survey revealed that they're committed to doing better. At one retail chain, executives are trying to increase awareness about data privacy in all departments, but it has been an uphill battle. "We need more education across the enterprise and continuous support from senior management," a marketer with the company explains. While his company has a data governance committee, he says "the challenge has been to demonstrate the cost benefits of a formal data governance discipline. No one wants to take ownership for data accountability and quality."  $\checkmark$ 

JAN KESTLE is the founding president of Environics Analytics.

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# Debbie Drewett

#### In a class by herself

BY BILLY SHARMA

ebbie Drewett is a very private person.
You won't even find a picture of her on her
LinkedIn page or a link to a Facebook page.
She is big believer in ensuring a proper balance
between work and family life.

But she is more than that, she is very talented, extremely knowledgeable and smart. Debbie is goal-oriented with extensive experience in fund development and well recognized for her ability to achieve results through leadership, teamwork and exceptional donor care.

I had the privilege of first meeting Debbie in 2007 when she and I were members of CMA's fundraising committee and I watched how much passion she had for helping CMA grow. She got involved in helping produce the CMA Fundraiser's Handbook, not just once but twice.

The thing that she enjoys most about her job as Director of Development at Geneva Centre for Autism and at all the jobs she has had till now, is the chance to help others.

As she said when we met, "I am fortunate to work in a profession whose goal is to help others. What could be more important or rewarding in life than helping to save lives?

"I am really passionate about healthcare and I truly believe that improving the health of individuals is one of the most powerful ways to improve society. Raising money for health charities is my specialty."

A seasoned professional she worked as the VP Marketing for the Lung Association, as the National Director, Marketing & Communications at Canadian Breast Cancer Foundation, as Senior Account Director at Russ Reid Company and at Stephen Thomas. So she understands the business of fundraising from both the advertising agency side and the client side.

One of her most memorable moments in fundraising was when she was working on the agency side. As she said, "I will never forget Dec 26th 2004. I was back in Montreal visiting my family for Christmas when the tsunami hit. I was working for an ad agency then and our major client was an international relief organization. Every second counted as we mobilized our agency team across North America. We had bilingual emergency response print

ads to develop and place; TV spots to produce with on the ground footage; radio spots to create and direct mail packages to drop. The faster we could move, the more money we could raise and the more life—saving support that would be available. It was fast and furious. It was also the first time in my career that I felt such urgency and a direct connection to the difference we were making every step of the way.

"I am always driven by outcomes. While others might not be able to see the forest for the trees, I see



the forest, the trees and the small village beyond.
I never lose sight of the big picture.

"The key is to find the right fundraising mix to optimize revenue diversification and build brand equity. In my last position I was able to reverse a 10 year downward trend in direct mail revenue through donor file analysis, audience segmentation refinement and personalized ask strategies."

And I totally agree with her on a lot of very important points that have made her so successful.

Too modest to take credit she readily admitted, "I have been very fortunate to work with so many talented individuals throughout my career. There are two individuals in particular that really stand out.

"I worked for Barry Baker at Easter Seals. Barry was a retired priest with a passion for direct mail fundraising and telethons. Barry was the mastermind behind the iconic children's artwork for the Easter Seal package.

"It all started with twin girls and a box of colouring pencils. The package won many awards over the years and was the 'control' that couldn't be beaten. This was my first taste of direct mail fundraising and I was hooked.

"It was there that I met Steve Thomas.

"Steve has amazing creative instincts and razor sharp strategic planning skills. It was a perfect pairing. I have worked with Steve on a number of different occasions over the years and then joined his firm as a Senior Account Executive for a few years. I never stop learning from Steve and to this day still admire his many talents and dedication to our profession."



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This is how Steve Thomas describes this iconic Easter Seals package in his book: 30 Letters That Changed the World.

This package was our most famous. The package was a fantastic success garnering a 2.2 per-cent response across the province. The previous high had been 1.7 percent. We entered it in the Canadian Direct Marketing Association RSVP awards for November 1990 and were thrilled to win the Vic Perry Award, presented to the Canadian direct marketing campaign considered to be the best of the year. A high-end version of the package was entered the following year and won Fund Raising Gold.

Debbie went on to tell me, "There are no magic bullets when it comes to successful fundraising. The key is to create meaningful and authentic relationships with donors and key stakeholders through personalized and integrated multichannel communications...everything from direct mail to telemarketing, email to social media. People give in different ways through different mediums and to different offers so it is really important to provide choice. We also need to invest in high-value donors (monthly, leadership and legacy donors) to ensure greater lifetime value."

She also feels very privileged to have worked with some important celebrities over the years. As she said, "I did a film shoot with Stevie Wonder for CNIB and I sat beside him on his piano bench while he played a song. It was magic."

"Betty White, though, was the best. She can memorize her lines in seconds and is one of the kindest people I have ever met. Celebrities have played a big role in helping charities tell their stories in a credible, compelling and emotive wav."

The other thing she confessed to me was, "I love George Smith's book Asking Properly: The Art of Creative Fundraising...it really made me change the way I approached direct response fundraising. I spend much more time now on the key response drivers such as the 'list' and 'offer' and much less. time fussing over creative. Today when I write a creative brief I start with the offer and answer the question 'What is in it for me (WIFM)?'

So, this was the one area where I disagreed with her—when she mentioned that she spends less time fussing over creative and I told her that I disagreed. After all she had just highlighted the iconic Easter Seals package and wasn't its success due to it being so different creatively?

She smiled and said, "I knew you would take issue with that." So we left

Her roots however are much simpler. She said, "I graduated from the University of Guelph with a Major in Consumer Studies. I grew up in a small community (population 5,000) just outside of Montreal so I thought the town of Guelph was huge.

"I moved to Toronto after  $I\,graduated\,and\,I\,now\,know$ what it is really like to live in a really big city! I love what Toronto has to offer .... the arts, multicultural environment and even the heach!

"I did some contract work for a market research company right after university. Our main client was Fruit of the Loom underwear. We must have done over 50 focus group interviews with women on what they look for when buying underwear for their husbands. There were some pretty funny answers. I learned a lot about underwear and how to conduct a great focus group session!!"

Married with two children, Debbie told me, "My husband and I just celebrated our 25th wedding anniversary and we have two teenage sons. All the 'boys' in our house play hockey so I spend a lot of time in arenas across the city. Penelope Burke once said that the only time we Canadians get really excited is when we lace up some hockey skates. I believe it!

"I am a hockey Mom. I spend a lot of time in arenas and on occasion can be a bit vocal when it comes to cheering on my son's team!

"I love to swim. There is nothing like the Muskoka Lakes but here in the city I joined a club with a saltwater pool overlooking the ravine. It is so beautiful. I also do Pilates and Zumba classes whenever I can."

Finally she also confessed, "If there is anything else anyone should know about

me it is this: I have never drunk a coke beverage...really... or seen any of the Star Wars movies. Odd, I know."

Not really, I would add. She is just in a class by herself.✓

**BILLY SHARMA** is president and creative director of Designers Inc. He can be reached via email at: designersinc@sympatico.ca or by telephone



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### Grumblings & Rants from a Data Guy (Part 4)

Volume 4: Don't Get Left Behind

hat is the true state of digital messaging in North America? Honestly, it's a mixed bag from both a Business Process and Customer Experience perspective. There are the "best-in-class" marketers and then there's the rest....and the gap is widening. The "rest" just executes campaigns and deploys stuff. Leaders, on the other hand, carefully plan their multi-year messaging roadmap and orchestrate their teams to work smarter. Leaders are highly disciplined and are constantly evolving. The laggards don't have a written plan, are under-resourced and often scrambling.

Some leaders have been doing it for years and it's time that the rest of marketers evolve. Use data to guide your strategic planning and help find the big potential opportunities. Drawing a roadmap and following the 6 pillars to success will get you results.

#### It's time for executives to herd the cats

Cats are nice pets\*. They don't over-indulge like dogs. Cats are relatively independent and they come and go as they like. Leave out some water and food and cats are good. But they have a mind of their own and do their own thing. Too many marketing departments are full of "cats". They purr about creative and wander around looking busy. But executives have to remember that if you get too many cats it gets messy and unmanageable. I may be stretching the analogy but it's time to herd the cats into one room. It's time to talk to your team about your company challenges and the road ahead and get everyone on the same page.

One of the best examples of rallying the troops was in 2004 (yes 2004) when Bill Stengel, Procter & Gamble's Global CMO, started to transform the way P&G did marketing. As his first step, he chastised the advertising industry at a major industry conference and told them that core problems of media cost inflation and declining efficiencies was hurting marketing clients. Stengel assessed the media industry was providing "C-" services. His message was to find another model and prove its effectiveness through better measurement (e.g., better industry standards and more robust testing methods). According to the Wall Street Journal, P&G subsequently shifted 8% of their budget out of TV and into alternative media. He then talked to his team about a simple marketing model called "3 critical elements." The model below that shows that holistic brand marketing should intersect with permission marketing. This overlap enables a company to build a community of direct relationships. The final linchpin is measurement.

#### The strategy of leaders

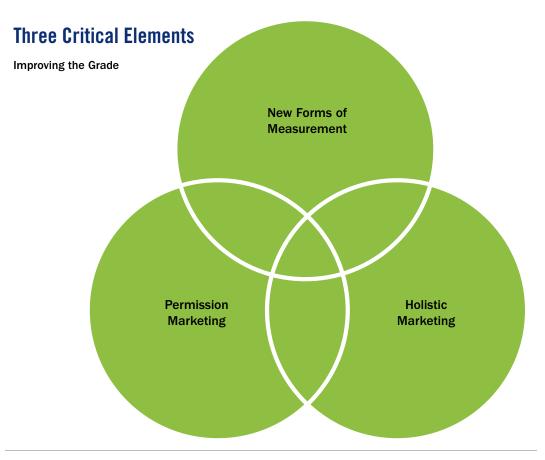
The big strategic opportunity for today's marketer is "customer centricity" and "data-driven marketing".

Marketers have the database and content management systems to do efficient messaging across multiple channels. . Each vehicle has a different role and it's up to the marketer to determine how best to configure their digital ecosystem for a great and meaningful customer experience. Response and engagement are nice but retention and relationship building have a bigger impact on your customers' lifetime value.

The digital leaders know the value of permission marketing and how to monetize it. They have a contact and content strategy and therefore are disciplined in deploying relevant and personalized campaigns/content. Their mission is to build a healthy and engaged community that is aligned with their marketing promise. Leaders deliver relevant content across unique digital properties that they control. They measure on multiple levels and dimensions, not just clickstream metrics. Remember, metrics are nice, results are good, but outcomes are what really move the needle (and impress the C-Suite).

Building permission marketing programs isn't done overnight. You need a business case, a plan and

long-term roadmap. A major sport brand commented that it took 1 year of sell-in to execs and another 2 years of planning to get to the launch phase. Most B2C and B2B marketers can get going within 3-6 months but it is an ongoing building process that takes leadership and planning.



THIS MARKETING model was outlined back in 2004and since then P&G has made major strides on developing their Sustainable Competitive Advantage (SCA). P&G's \$1 Billion shift from their TV budget to online helped generate more than 65 million records via their marketing program from 2004-2007. In Canada, P&G is currently one the biggest spenders in banner advertising and operates a growing email program.

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A roadmap framework is a great way for the team to see how your vision will unfold over several years. The foundation starts with data and you need to know your target audience well before ramping. Start simple and add more capabilities stages/phases as you grow. Use a capabilities scorecard to outline the key skills that your team requires. Here's a good starting point: Forrester Research has an "Email Marketing Scorecard" that can be adapted for marketing strategies.

It's not all roses though - even the current leaders have capabilities gaps. Marketers should annually address the key gaps and refine their programs. Success comes as an iterative process.

#### What are the key pillars?

Below are a few tips to help build your roadmap. Keep these key areas top-of-mind when you're planning out your annual data-driven strategies.

#### 1. Gather explicit permission

Gathering permission is the first step in building a relationship and building your community. It sets expectations and builds trust. Leaders have a clear permission process, acquire explicit permission from subscribers, and use advanced Preference Centers to understand the content that is most relevant to subscribers

#### 2. Leverage smart data first

Condition your data and use what you have. Don't chase data that you don't have a strategy for. Focus on data points you can leverage to drive revenue or save costs. There are typically 2-3 "golden fields" that are important for businesses to collect. Big data can wait.

#### 3. Integrate

Draw an "integration blueprint" that shows the hardware, software and systems you have and/or need. Highlight where the data is stored and how it gets transferred between CRM, data warehouses or your deployment system. Create a data strategy.

#### 4. Measure: what gets measured gets managed

Leaders use a cross-section of strategic and tactical measures. They closely monitor the health and engagement of their lists and proactively manage segments. Measurement is not only about simple campaign metrics but should be about major results and transformational outcomes.

#### 5. Go for the low hanging fruit (LHF)

Top marketers look for the "low hanging fruit" and make sure these programs run on a regular basis. Ideally, LHF programs (welcome stream, abandoned shopping cart, etc.) are automated which greatly increases the ROI.

#### 6. Focus on increasing potential value of customers

Know the current value of segments and how you can change their behaviour to increase their Potential Value. Think "this customer type is worth \$ today, but if we just get them to buy one more product/month, they're worth \$\$\$ down the road". Build plans that will help grow your customers' value.

#### Conclusion

Remember that marketing an incremental game. Doing a few things well compounds your success. Initially it can all be a little overwhelming, so think big and start small. Set up your roadmap to provide short-term wins and long-term success. Finally, make sure that your team is on the same page and "herded" in the right direction. <

\*Disclosure: Geoff Linton is a pet lover who has a fiercely independent cat ("Wellington") and a fun loving Bernese Mountain dog ("Stella").

**GEOFF LINTON** is Vice President of Inbox Marketer with over 25 years of direct marketing experience. He's passionate about data. He's really, really passionate about data. So, we let him rant and grumble about all things data here. Read on to have myths explained, get tactical advice, and learn what really matters when it comes to data in the digital space. You can reach him at geoff@inboxmarketer.com, 519-824-6664 x225



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#### CONTINUED FROM PAGE 4

the ideas have been baked but well before execution in order to integrate and make the best use of technology for the specific application can yield huge benefits. Including the execution teams for off-line and on-line will also encourage a consistent brand look

The discussion can be the data to which a company may have access, which can include:

- ✓ Known data, NAB, previous purchases, service information, demographic and collected information
- Segmented data, age groups, product versions, what you might be currently using to segment your databases
- ✓ Analytical / Predictive data, what information might you be predicting via internal models about your customers

- ✓ Stats data, what information can be pulled from statistical information and sources such as Stats Canada, list brokers or Canada Posts' databases
- Geography, as always what information is available from a geographic perspective.

By looking at all these hard and soft data points you will be in a position to create more relevant communications. Consider it in basic terms of what current "versions" you may be producing now. Versions can be eliminated and taken to the next level.

The industry needs more daring participants. The agency for the program mentioned earlier was daring at the time because it used some of the data points above but also made some assumptions. Today we can be fixed on accuracy and in this realm it may not

be necessary. For example, consider an insurance communication – if we know there are husband and wife in a certain age category use imagery for that age category, if this is an assumption use it anyway. Some might suggest it could inaccurate. The designers are going to use a generic picture that could very well be inaccurate (like they have for decades) and that's okay. The idea is that the recipient doesn't know you're trying to create an environment designed for them, it's just an image, but if you get it right it will be that much more relevant. It's all about subtle imagery, not exact imagery.

Consider the use of geography and imagery in relation to home (or contents) insurance. Multi-unit dwellings vs. single units vs. hi-rise (which can be ascertained from in-house data, stats and CPC), what

imagery can we use to match the housing styles or look in given areas that make the recipient feel more like we're speaking to people like them. Make no mistake, this is not about making the recipient feel uncomfortable by including a picture of their home (creepy) but by including homes that look like their neighborhood.

Today there exists equipment to produce variable colour quite cost effectively for mailers in Canada and the US. From sheet fed digital presses to large-volume, continuous feed digital presses. And more importantly than ever there are software tools that can help customers draw out data and employ analytics to create the imagery necessary for relevant and compelling variable colour for mail and online communications. One mustn't forget the post imaging production processes as well after it's been imaged, is it simply a letter into an envelope is it a booklet, or self-mailer. All need to be considered.

Zomparelli sees the progress of digital colour

as having come a long way in the last few years but still believes there are strides that can be made in the execution to get the imagery closer to that of offset with things like prepress and even newer technologies such as matte toner.

All the professionals I spoke with for this article agreed there was a lack of talent when it comes to data driven marketing. Whether this is due to the technological understanding of datadriven communications or a mindset it provides an opportunity to the educators in the industry (university, college or even industry organizations CMA or DMA). These organization will have to figure out how to incorporate these concepts into learning - maybe the ideas around data-driven is one that can be applied to online and offline, thereby not sparking the debate between paper and digital – just get people thinking about relevant communication first.

I dare to suggest maybe our perception around timelines is not so much a problem with the consumer's requirement for immediate gratification (unless it's fulfillment or a response to something) but the industry's need to satisfy their thirst for speed to market. As an industry we need to slow down our cycle, share success stories, think about what we're trying to achieve, and encourage everyone to take a few minutes to understand the power of variable colour and appreciate the kind of relationship it is capable of building in this society of quick-hits, flashy headlines and immediate gratification - true, longterm relationships, value and margin. There are few real leaders in the market creating great value with variable colour, you can too. ✓

JOHN LEONARD is V. P. - Sales & Marketing of Cover-All Computer Services Corp. where he works with his sales team and clients to develop relevant and effective communication by using data and technology. Having once worked inside the agency culture, partnered with a variety of printers and currently involved with awareness and education he is an advocate of direct marketing and the benefits of using data in communication to drive better results and establish stronger relationships. John can be reached at jleonard@cover-all.ca,

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MANAGEMENT THE CUSTOMER EXPERIENCE MAGAZINE ISSUE 4

# Building a culture of caring: and other secrets to

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# **ASK AFFY**

Help! We have been tasked by our CEO to transform to a culture of customer centricity. We have started a project to fix process and policy but changing the mindset of our agents and leaders has been very challenging. Any advice?

Thanks for your help! Signed, Spare Some Change?

Dear SSC,
Cultural transformation is not a quick or easy undertaking. At SwitchGear we are constantly asked for help to drive this type of change in organizations. To that end, we compiled a series of easily digestible short leadership lessons to kick start thought leadership. Below is one excerpt labelled "The Power of Dissatisfaction" from our book called "Game Changing Ideas: 10 years of SwitchGear Insights" that I feel will help you take your first step toward sustainable change. Good luck in your endeavour!

#### The power of dissatisfaction

The #1 role for leaders is to create positive change and help people through those changes. While the role of the manager is to avoid risks – manage the here and now with minimal downside – the role of the leader is to take risks and helping people change is inherently filled with risks.

In highly successful operations we see, leading change has become a core skill for everyone.

There is a science to design and implement change – continuous process improvement, project management, communication campaigns – and these are necessary steps to achieve higher goals. Many leaders however don't know there is also a science and art to Change Leadership – helping people get past their natural resistance and embrace scary new ideas until they are successful.

#### The equation to get started

If we are going to help cause lasting change in ourselves or our teams, then you are a leader, a coach, a sales manager (or a parent), and you should understand the Beckhard-Harris Change Equation (BHCE). The BHCE framework is an important universal tool for personal change or moving a team forward.

#### Dissatisfaction with the status quo x vision x first steps > resistance

Humans are programmed to resist change in many situations... an employee is upset by the changing requirements of his job, a sales prospect can't make a decision which seems risky, or a child doesn't know how to change their bad behaviour.

But people WILL change if they FEEL dissatisfied enough with the status quo. People make changes all the time when they are motivated enough to do it.

But in the workplace, sometimes people are NOT dissatisfied – they are in cruise control, they keep their

head down, they follow the same safe routines as they have for years. Life may not be great, but it sure is okay. They may not want to change.

In this complex and high-speed world it is a critical leadership requirement to create and maintain a culture that is Positively Dissatisfied with the current state, as well as creating a new Vision for how to improve and move forward.

Let's look at some key ideas about the change equation:

As we said, all change starts with dissatisfaction ... an emotional discontent or frustration with the way things are today. Why would anyone tackle the difficulty of change if everything is good enough today? It's important that the Dissatisfaction with the current state must be strong enough to overcome our inherently human resistance to change and the effort needed to make change happen successfully. It is not hard to introduce the new coffee machine into the lunch room, but asking service agents to sell or getting managers to coach may require some leadership upfront as to WHY make

#### In answering, "why change", the secret lies in creating or harnessing emotions.

Take the tragic 2013 shooting in Newtown Connecticut as an example. It provoked a collective national reflection and created an opening for President Obama to tackle the big, politically risky change project called Gun Control. He attempted to harness the widespread Dissatisfaction to motivate a whole nation towards taking real steps forward before the emotion dissipated. The US gun culture, lobby was a powerful force against him but for a short period of time - while the emotion was most raw - there was a glimmer of hope, courage to push back, and new thinking and partnerships.

Here's why Dissatisfaction is essential to ANY change:

- 1. The Pain and Pleasure Principle:
  Anthony Robbins boiled down
  our human tendencies into two
  behaviours: we avoid pain and seek
  pleasure. Left to our unconscious
  and natural decision-making, we
  avoid uncomfortable situations and
  seek the path of least resistance.
- 2. Positive & Negative Dissatisfaction: Leaders need to generate inspirational Positive Dissatisfaction, while carefully

wielding Negative Dissatisfaction. Positive Dissatisfaction encourages risk-taking, innovation, collaboration, and can become sustainable. But Negative Dissatisfaction can also shake people from their stasis because when it is really bad we know that something new is needed. Note: Negative Dissatisfaction also has its warning label - used incorrectly or used too much will decrease employee morale, and can destroy an individual's confidence, energy and purpose. A company having a bad quarter, off 20%, can rally the troops while a company in a free-fall revenue scenario will likely lose its best people?

3. Breakdown before Breakthrough: You'll recall the Dickens story where the ghosts of Christmas P, P & F save Scrooge's soul from an unhappy ending. They helped him become VERY dissatisfied with his current ways and motivated to avoid the predictable outcome if he did not change. Think forward into the moment when a heart attack creates the motivation to quit smoking ... or a company is faced with bankruptcy before the union and management will collaborate ... or when a spouse leaves us before we will think hard about how we treat others. Suddenly the resistance to change feels smaller.

#### If Dissatisfaction is the first step required for any change, ok, what do we do next?

APPLY the Equation to a Problem You're Facing

"Dissatisfaction" is one of four essential elements of the Change Equation process but is a step often left out by leaders.

After reviewing the equation, identify a specific issue that you and your team are struggling with AND define where the Dissatisfaction is coming from. Is it customers? Employees? Executives? All of the above?

Once you've pinpointed where the discontent starts, begin thinking of how you can highlight both the Positive and Negative Dissatisfaction in the right balance around that issue. This will get the emotions started. Remember, you need this emotional motivator ... igniting action AND getting your team moving towards real change.

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# Real-time workforce = real competitive advantage

#### By Matt McConnell

n today's competitive, multi-channel contact center environment, customers are fast-paced and on the go – and they expect service providers to keep up. Now more than ever, customers want their questions answered quickly, accurately, and on the first try.

As your frontline employees, contact center agents have the unique opportunity to make a lasting impression on your customers, representing both your company and your brand. But one misstep and those same customers will hit the airwaves, sharing their dissatisfaction with the world.

In order to compete, contact centers must become responsive to demand, transforming their agents into a real-time workforce equipped to serve customers quickly and efficiently every time, or risk losing business to a more agile competitor.

#### Keys to a real-time workforce

As the contact center environment becomes more complex, savvy companies have embraced technology that allows them to react to changing conditions in real-time and maintain consistency across all channels.

This technology enables contact centers to better serve customers through a number of automated improvements such as:

#### Finding time for agent improvement activities

A call center agent's primary job is to interact with customers and serve their needs, but it isn't their only job. In order to effectively handle customer inquiries and provide consistency across all channels, agents need ongoing training and coaching, which requires time – a scarce resource in even the best run centers.

Intraday workforce management enables contact center professionals to aggregate natural downtimes in call volume to find more time for agents to complete the critical off-phone work they need to better handle customer needs.

Specific tasks can be assigned and prioritized according to individual agent strengths and weaknesses, and when call volume spikes, agents are automatically prompted to return to answering calls so that service levels are not negatively affected.

#### Maintaining skills tables

As agents increase their competencies, skill and queue associations are automatically updated, ensuring that customers can always reach an agent who is equipped to handle their inquiries.

Time that would otherwise be spent manually updating queues or tracking whether or not agents complete performance-improvement activities is instead used for supervisors and managers to coach agents to make them better and more confident at their jobs – all of which drives the overall customer experience.

#### Shifting agents between channels to meet business demands

Agents need training and coaching to effectively handle customer inquiries, but in multi-channel environments, they must also move between e-mail, phone, chat and social according to volume so that customers quickly get the answers they need in whatever channel they prefer.

Typically, this workforce is managed separately or workforce managers manually shift agents between channels to maintain service levels, a process that is time consuming. This can leave customers on hold for long periods of time, contributing to frustration and an overall poor experience.

With real-time intraday workforce management, when one or more queues experiences a spike in volume, specific groups of agents with the required skills can be automatically reassigned to handle customers in that specific channel.

#### Receiving important notifications before it's too late

Often, by the time trends that negatively affect service level adherence and performance are identified in the contact center, it's too late. By automating alerts and notifications, managers and supervisors can monitor agent performance and identify trends – such as calls going on too long—in real-time and offer support to agents before service levels are impacted.

#### Staffing to demand

Even the most efficient contact centers experience un-forecasted fluctuations in call volume, leaving managers with the choice to either over- or under-staff. While overstaffing is better for service levels, it is also very expensive.

By automating intraday staffing, contact centers are able to quickly and intelligently respond to unexpected staffing needs to ensure that there are always enough skilled agents on the floor to meet customer demands. Through automated monitoring of the ACD and WFM, if service levels drop or net staffing is too high, managers can create business rules to trigger the voluntary overtime or time off process with consistency.

#### Real-time = Real advantage

Fully automated and optimized contact centers have the technology in place to find more time for agent training, update queue associations, and balance staffing across channels in real time. The result is that there are always enough of the right kinds of agents on the floor with the knowledge to help customers with their requests.

By implementing intraday workforce management tools, contact centers can make the right moves at the right time to provide a better overall customer experience. Companies with real-time workforces can minimize missed opportunities and gain a true competitive advantage.

How agile is your contact center?

Matt McConnell is CEO of Intradiem, formerly Knowlagent, the leader in intraday workforce management solutions for multi-channel contact centers. Intradiem helps customers both improve productivity and the customer experience while lowering costs. Intradiem's solutions automate manual processes such as intraday task management, intraday staffing, reskilling, channel balancing, and real-time alerts to enable companies to create an agile workforce and improve business performance by over 20 percent. More than 450,000 contact center, field service, retail, bank branch, and back office employees around the world use Intradiem's solution every day. For more information, call 888-566-9457 or visit www.intradiem.com.

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### Are you EASY to do business with?



By Eli Federman

Simplicity: the quality of being easy to understand or use. The state or quality of being plain or not fancy or complicated.

f all things were that simple, wouldn't life be just a bit easier to lead? Don't get me wrong - although I am often labelled the eternal optimist, even I can have a rough day. And often when I do it's because something unnecessarily complicated is making me crazy. I truly believe that there is no industry where complexity is getting in the way more than our own.

Think back to the last difficult experience you had as a customer – would things have worked out differently, had the person you were dealing with figured out how to simplify things? I would say yes. Too many companies are making things far too complicated when it comes to servicing their customers.

Check out this statistic: 40% of companies cite complexity as their greatest barrier to improving multi channel customer experience.

That's almost half! If this isn't the ultimate indication that as Customer Service Leaders we need to start making things simpler, I am not sure what is.

What are some ways companies today are making the customer experience more complex?

There are many ways to make a customer's experience more complicated and ultimately increase their effort in interacting with you including, complex technologies that are difficult to use, processes that don't work or slow resolution to a crawl and employees who appear untrained and/or unwilling to help.

Think of the last time you had a difficult experience as a consumer, did you experience the following?

- An employees who had to transfer you because he/she couldn't resolve your issue
- A complaint resolution process that just won't end
- Getting lost in a complicated IVR when all you want is to speak with a live person
- Using a website only to find it impossible to search for anything

If the answer is yes than you are no different from any other consumer. The key becomes who can fix them, and fast. I believe that those who do will absolutely have a substantial edge in their industry.

I suggest a three step approach to making yourself easier to business with:

- 1. Take a close look at your customer service organization. Ask yourself, why do customers do business with you and what is making things difficult? Talk to them to really understand. Conduct surveys and facilitate focus groups be prepared with insightful questions and be ready to learn. Speak with your internal customers too (your employees). Nobody knows more about what your customers really think of you.
- 2. Gather the great information you just sourced and review it with your team. Getting various and diverse points of view will help create a more complete assessment. Consider where you are having the most trouble with complexity. It is crucial that you consider all channels when making sense of what isn't

working. Being consistent across all channels makes for a great competitive advantage.

3. Design your plan. This is essentially your road map to simplicity and ultimately customer service excellence. It should focus on three overarching areas that define any business – people, process and technology. Underneath each decide on activities you will perform.

Who are some of the world's best companies at creating exceptional customer experiences?

Let's examine a couple, who are considered to be within the top 10 (in America) – Source MSN, 2013.

South West Airlines: A U.S. based carrier that many Canadians know little about, they set the tone as far as employee culture. I did some research on this company and it become crystal clear why they are the most talked about, liked and respected airline in the Unites States. They CARE exponentially about their most important asset – their employees!

Happy and Engaged Employees = Satisfied and Loyal Customers How is South West doing it?

- Check out their mission statement: "Dedication to the highest quality of customer service, delivered with a sense of warmth, friendliness, individual pride and company spirit." They make it clear: everything starts with SERVICE. They go a step further and talk about the kind of service they will deliver: warm, friendly, etc. This reflects their People first culture!
- You can navigate the IVR pretty easily and have the option to serve yourself, and you can speak to someone live and fast, at least from my test calls! Navigating their web site is simple and the flight booking experience in particular is seen as best in class.
- They are price competitive and one of the only airlines to not charge for checking bags. They are also known for the "South West Effect", meaning that wherever they fly they force the competition to drop their prices.

**Amazon:** Amazon is the ultimate choice when it comes to an easy,

fast and consistent on line shopping experience. To experience how easy they are to do business with, order something and be amazed.

Here's how Amazon is delivering a best in class shopping experience:

- You can find what you're looking for easily
- They proactively offer you items based on your most recent shopping activities
- They have a no hassle returns process – if you don't like it simply send it back
- An available and extremely helpful live customer service team, if you need them
- An incredibly easy to navigate website and check out process In Amazon's case, they showcase the art of using simple, easy to use processes combined with intelligent and intuitive technology. Their employees are pretty impressive too.

So what are the key themes from these two world class service organizations? SIMPLE:

**People:** Challenge, engage and take exceptional care of your employees

**Process:** Build smart, easy to use and necessary processes

**Technology:** Invest in scalable, user friendly and stable technology

Combined, the tone is set to deliver an exceptional customer experience.

Now let me qualify that creating an exceptional customer experience isn't easy. There is a ton of work that needs to be done once you clearly articulate your plan. But it starts with simple messaging and simple execution. Once you have those, and you are sincerely committed to seeing it through, with an unprecedented investment in your most valuable asset, your employees, it really is possible.

Just ask South West and Amazon.

Eli Federman is a passionate customer service professional with 20 years of management experience and a peep knowledge of call centres including all facets of inbound and outbound operations. Hi company, Customer Service Simplified, helps organizations simplify and distinguish their Customer Experience. To learn more visit www.simplifyingservice.com.

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# Flipping the Script Improve Customer Satisfaction by Reducing Costs

#### By Siobhan Miller, Director, Solutions Marketing, Verint

raditional wisdom puts forward that reducing the investment in customer care will erode the quality of customer interactions—and in turn—customer satisfaction and loyalty. Indeed, contact centers have long struggled to balance two seemingly divergent goals: reduce operational costs and improve customer satisfaction. But what if cost and satisfaction weren't, in fact, opposite ends of a scale, but co-dependent? What if improving customer satisfaction was a byproduct of cutting costs?

The biggest drivers of costs—repeat calls, long handle times, self-service failures—are all indicators of issues which require customers to exert unnecessary effort to seek resolution. As the incidences of these issues increase, so does dissatisfaction. By keeping handle times low, improving first call resolution and addressing self-service failures as they arise, operations executives can find themselves in the enviable position of optimizing contact center cost as they drive satisfaction.

The key is preparing your frontline and back office to best handle the issues your customers care about. But this requires a thorough understanding of call drivers—a way to listen to all recorded calls. Customers that have leveraged speech analytics on top of contact center recordings have seen some tremendous returns on their investments. Speech analytics enables users to quantify which issues are truly impacting costs, allowing teams to focus their coaching, training and scripting efforts on those calls. The customer-driven insights derived can also be used to build business cases for engaging internal business partners and resolving back-office or self-service issues that drive calls to the contact center in the first place. When everything works as designed, customers are more satisfied.

Here are examples of how organizations have flipped the cost-satisfaction script:

Reducing cost-to-serve: Costs within the contact center fall under two categories: those that the operations executive can control, and those that are driven by external factors. Reducing controllable costs centers around agent performance and training: are agents able to resolve issues on their own? Are they coached on the processes needed to address the most frequent questions that come into the contact center? Has the team automated the systems and processes used to support these efforts? In order to focus on preparing agents to address the reasons why customers call, you have to understand why customers are calling.

For example, a North American bank slashed four minutes off its Average Handle Time as it improved its Net Promoter Score (NPS). Using speech analytics, the team

uncovered that agents were fumbling on questions involving interest calculation. The tool provided insight into the questions that most often caused agents to stumble, and the organization then focused coaching and tip sheets around those questions. By addressing customer inquiries in a shorter amount of time, customers left the calls more satisfied

Decreasing call volume: Training agents for calls that come into the contact center can reduce handle time, but it would be better if the calls weren't made in the first place. To that end, speech analytics can provide quantifiable evidence that a product, service or process failure originating outside the contact center is driving costs within it.

A leading provider in mobile services figured this out quickly. The organization implemented speech analytics to help systematically identify the underlying issues driving calls into the contact center. It uncovered that many calls were the result of billing-related disputes and self-service failures—many customers were exceeding login attempts and getting locked out of their accounts. Armed with this information, the telecom was able to shave 6,000 calls a month from its contact center. Aside from the obvious cost reduction, there were 6,000 fewer reasons for customers to call each month. The changes implemented helped avoid future dissatisfaction.

Driving service recovery: With contact centers serving as one of the last stops on a customer's path out the door, operations teams are in the unique position of 'owning' feedback that holds clues to which issues are driving attrition and which customers are at risk of churn. Most importantly the agents fielding these

calls may serve as the last hope for recovering the customer before a final exit.

Speech analytics can focus agent coaching efforts on how to respond to attrition risks. It also aids executives in leveraging existing quality and coaching programs to track at-risk issues that contribute to attrition – such as poor service, non-performing products and fee dissatisfaction. This helps recover lost revenue and potentially lost customers.

For a leading global payments provider, retaining customers – especially high value customers – has been a top priority. The company used speech analytics to help create a profile of customers likely to defect soon, and then used the technology to identify which customers were attrition risks. Those customers deemed likely to leave became the focus of a retention program that was able to successfully keep a large percentage and see an ROI on its analytics investment in a matter of weeks.

#### Take-away tips

Contact center executives are charged with containing costs, particularly in unsteady economic times. In the past, cost cutting often negatively impacted the customer experience because a lack of insight into the cost drivers led to best-guess budget cuts at best and random slashing of line items at worst. The advent of analytics solutions helps enable leaders to cut spending with surgical precision, optimizing their businesses as they drive customer satisfaction.

**Siobhan Miller** is the Director, Solutions Marketing at Verint

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# Building a people focused contact centre Part 2 of 3 - Retention

#### By Jeff Doran & Sangeeta Bhatnagar

This is the second of a 3 part series where we will look at building an engaged workforce culture from both a centre-wide and individual level. Part two focuses on strategies for retaining top talent.

t's great to have single digit turnover rates, but if 80% of your workforce is disengaged; you've got a big problem on your hands. In an Ipsos Ried poll, 22% of Canadian employees expressed decreased loyalty to their employers. And in companies where salaries have been frozen and staff has been cut, that number jumps to 31% and 36% respectively.

Loyalty is the key to retention. But simply retaining employees is not enough. So how do you create loyalty, when all your employees see is: continuous restructuring, cost cutting, down-sizing and doing more with less? You need to show your employees that you care and that you value their contributions to the company – every single day!

This starts at the executive leadership level. The president/CEO sets the tone for the rest of company to follow. Bryan Pearson, President of LoyaltyOne (providers of AIR MILES Reward Program) wrote a book called, "The Loyalty Leap". In his book, he talks about giving the employees the wheel to drive loyalty. He says, "Enterprise loyalty is about liberating your employees to be spontaneous customer advocates. Just like you need to set data free across an organization, it's time to free your associates to use their teaching, talent and common sense to move the company forward."

### Quick Points to consider when recognizing and rewarding

In line with showing that you care about your team(s), at a personal level, it is important to understand what makes each person tick. The following demonstrates 4 personality profiles you should be aware of:

D Dominant, decisive, doer, fast paced speech, task-oriented person. They respond to and love greater responsibility

- Inspiring, people orientated, great ideas, fast paced speech individual love to have FUN, and typically respond to the "BIG SHINY STAR" with lots of fanfare! Since they typically are the life of the party, they love the additional attention and public recognition.
- Steady, stable, introverted person, slower paced speech. They typically do not crave lots of fanfare. A genuine appreciation of their efforts is what garners the best response in this temperament. Even though recognition in the corporate sense is generally public in nature, it is wise to find the time to recognize and show appreciation for our staff with an S temperament.
- Cautious, compliant, slower paced speech, task oriented person. Responds to being valued for specific actions and tasks being done correctly.

#### Show them that you care

"Caring" is defined as: displaying kindness and concern for others. A "Thank You" note for a job well done, a verbal pat on the back for doing extra work, a Tim Horton's (or Starbucks if you prefer) gift card for handling a difficult customer, or letting someone leave early to deal with a personal situation. Some of these things may seem small and insignificant, but to employees who are struggling to balance their workload or are unsure of their place in the company, it can mean the world. But caring goes much deeper than that. It is an important human characteristic that allows people to connect on an emotional level and create stronger bonds with each other. It includes elements of trust, respect and compassion. When you have a leadership team that truly cares about their employee's personal and professional wellbeing, you have one of the best retention strategies imaginable. Care has to be heartfelt. It cannot be turned on and off with the push of a button. Take the time to get to know your employees

and understand their goals and challenges in life. The extra time spent on this will create huge dividends in employee loyalty and dedication down the road.

It is so important for all levels of management to be self-aware of their respective communication styles and how it is received by their staff of differing personalities.

Caring has to be heartfelt. Having empathy towards others is critical in understanding others points of view, thoughts and feelings. Dr.Daniel Goleman, author of best-selling book Emotional Intelligence, noted that there are three levels of empathy. The three levels are Cognitive, Emotional and Compassionate Empathy.

Great leaders with the highest performing Direct Reports are those that have Cognitive Empathy. This is "mind-to-mind, giving us a mental sense of how another person's thinking works. It is one of the three kinds of empathy, each with a premium in the workplace and in relationships anywhere in our lives."

We shall explore the other 2 levels empathy much deeper in our next article around Team and Staff Development.

#### Recognize, reward and value their contributions

Most all employees want to know that their organization appreciates the work they do and the effort they put forth. It's a validation that their work is meaningful and that they are contributing to the success of the organization. Through my work with a variety of contact centres, one thing is consistent – employees want to feel proud of where they work and what they do. This is reinforced through the leadership words and actions. When executive leadership recognizes front line employees, the impact is significant and long lasting.

Rewards and recognition are critical to maintaining an employee first culture and keeping people engaged. However, statistics tell us that employees don't always feel they are being rewarded for providing excellent customer service. This is a big "red flag" for managers. Rewards and recognition should be designed to encourage positive behaviours, drive

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performance goals and help employees feel valued for the work they do.

FedEx has something called the Bravo Zulu award (Bravo Zulu - a US Navy term meaning 'well done'). This is a monetary reward managers can give to any staff member for exemplary service. Managers reward employees for outstanding efforts and achievement on the spot. Rewards may include "quick cash" bonuses, theater tickets, dinner gift certificates, and other gifts of similar value.

It's important to make it visible. Customer compliment letters posted in a highly visible area in the contact center are a great way to announce the good work performed by individual members of the team.

Remember, rewards and recognition do not always have to be public or on a large scale. They must be genuine and specific to the individual. Each personality connects to and responds differently to the various types of recognition.

Believe it or not – Pizza parties and the "Big Shiny Star" will not be valued by all employees in the same manner.

#### Train and support them

Enlightened contact centers are aware of the affect targeted training and development has on customer satisfaction. They also know the effect it has on employee morale and retention. In fact, from our Best Practices Report, Training and Development scores as one of the highest employee satisfaction categories for Employer of Choice® certified contact centers.

It's important to understand that training and development programs are becoming more than just product knowledge and skills improvement sessions. They are becoming an integral component of the overall customer experience strategy for the contact center and organization.

Is your training relevant and ongoing? Do you have testing and tracking capabilities built into your program? Do you solicit feedback from your employees to determine if the training was impactful? Do you benchmark with other organizations to ensure the most current and effective training methods are being utilized? These are just a few of the question you need to ask yourself to ensure your training is hitting the mark.

From orientation through to succession planning, make sure you are training and developing your employees to be successful in not just their jobs, but in their careers and lives as well.

Understanding learning styles and personality blends will help in ensuring that the learner actually learns. The goal of a trainer/instructor/coach is to ensure that the learner receives the information as intended. It is critical to understand that there is great diversity in learning styles that accompany the various personality blends and communication styles.

For the following 2 personalities (D and I), a slow, monotone teaching style with lots of charts, graphs and figures will not produce favourable results to engage these learners. Typically, retention and engagement will be less than desirable

- **D** Dominant, driver, fast-paced personality: Responds to bottom line, to the point, faster paced with a purpose for the lesson or story. Typically, starting at a high-level and then getting into specifics at a fast pace works best for this personality type.
- I Inspiring, fun loving and fast-paced personality responds best to relevant stories, minimal details, delivered with lots of energy and enthusiasm.

For the following 2 personalities, speaking too quickly, too loudly, and too general (big picture)Learners also respond and receive information according to their own personality and communication styles will also lead to disengaged learners.

- **S** Stable, steady, slower-paced communicator responds best to instructors/trainers speaking in a friendly, slower-paced manner with lots of relevant stories and examples. They typically do not respond well to surprises and like to know what to expect throughout the lesson.
- C Cautious, analytical slowerpaced communicator responds best to instructors/trainers that have detailed agendas, charts/ graphs to support the lesson or the stories. They do not respond well to lots of activities as they typically find the FUN activities to be silly. These learners love the details, facts, figures, case studies all to be delivered factually.

There will always be a percentage of your workforce looking for another job. In fact, a certain amount of turnover is healthy. Most contact centers we work with are targeting a

10 – 15% annual voluntary turnover rate. This is a realistic range and allows the centre to help people progress into new positions at a manageable rate.

Band-aid solutions are no longer acceptable. Organizations need to start focusing less on short-term retention strategies and more on a developing better workplace cultures. Creating a strong workplace culture isn't merely a way to keep people employed at your company. It's a way of being.

Of course, you need to hire the right people, nurture, train, develop and support them. You need to understand what they want to achieve and to help them achieve it. But if you go deeper and connect with your employees on a personal level through your words and actions, then they will not only stay because they need to, but because they want to.

Retention is really about caring leadership and employee pride. If you can build your culture to exemplify these attributes, you're well on your way to attracting and retaining the talent you need to succeed.

#### GTACC is a community of givers

Thanks to the generosity of GTACC sponsors, attendees, speakers, volunteers, and the amazing Advisory Council, \$3,000 will be donated to each of GTACC's three charities.

GTACC supports several excellent charities, but one is literally changing the world. With the belief that "World Change starts with Educated Children", Room to Read has impacted millions of lives. Last year, GTACC gave \$1,750 dollars to three Room to Read programs, which equates to 1,750 local language books to fill empty shelves in the libraries. Imagine what \$3,000 can do!

Room to Read believes that "World Change Starts with Educated Children" and envisions a world in which all children can pursue a quality education that enables them to reach their full potential.

Room to Read seeks to transform the lives of millions of children in Africa and Asia by focusing on literacy and gender equality in education. Working in collaboration with local communities, partner organizations and governments, we develop literacy skills and a habit of reading among primary school children, and support girls to complete secondary school with the relevant life skills to succeed in school and beyond. Room to Read currently works in 10 countries: Bangladesh, Cambodia, India, Laos, Nepal, South Africa, Sri Lanka, Tanzania, Vietnam, and Zambia. Since it started in 2000, nearly 8 million children have been given better access to education through Room to Read.

#### How can corporations get involved?

Becoming a corporate partner to Room to Read demonstrates a company's values and social responsibility to investors, customers and employees. Room to Read has been fortunate to have had support and commitment from corporations ranging in size, sector and geographic footprint.

- » Types of corporate investments through Room to Read include:
- » Corporate philanthropy
- » Gifts in kind
- » Proceeds from sales, contests and campaigns
- » Program collaboration
- » Event sponsorship and public relations

To learn more about becoming a corporate partner, contact Toronto@roomtoread.org
Thank you for supporting Room to Read!

Sangeeta Bhatnagar, GTACC Chair and proud Room to Read supporter

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# sales fundamentals for contact centre managers

#### By Mike Aoki

"Success is neither magical nor mysterious. Success is the natural consequence of consistently applying the basic fundamentals."...leadership expert Jim Rohn

hat are the fundamentals when it comes to contact centre sales? Your Agents need to have enthusiasm, create a conversation, ask the right questions, listen for answers, use product knowledge to recommend the right solution, promote benefits and close the sale. However, are your Agents executing those fundamentals? Or, have they lost sight of the basics?

Use your quality assurance program to identify opportunities to coach your Agents on these foundational sales skills:

1. Do Agents have energy and enthusiasm in their voice?

Blair Singer, the best selling author of "Sales Dogs" put it best when he said, "Sales is an energy business, what you expend comes back." If your Agent sounds excited about your product, customers will pick up on it. If your Agent sounds disinterested, customers will notice that too. One of the biggest roles of a coach is to keep your team motivated. On a department wide level, you can use commissions, sales contests and promotional items to drive performance. On a one-on-one level, make each Agent feel important by listening to their needs, suggestions and concerns. If their enthusiasm and confidence are dropping, remind them of past successes and commit to helping them regain the fundamentals.

#### 2. Do Agents create a conversation with their prospect?

The salesperson/customer relationship has changed dramatically over the past 20 years. Before the Internet, a salesperson's value was their product knowledge. They were trained by the manufacturer or service provider. As a result, the customer had to depend upon the salesperson for product information. Now with the Internet, that balance has shifted. Customers often know more about the product than the salesperson due to web sites like Yelp, Amazon, etc. So with their product knowledge advantage lost, salespeople have to focus on adding value by becoming an advisor to clients. They need to create a conversation with a prospect and custom tailor a solution for them. If your Agents are failing to create a conversation - if they are simply order taking - you need to coach them on rapport building skills so they can get a conversation started.

#### 3. Do Agents ask the right questions?

Create a list of 3-5 questions Agents can use to uncover a prospect's needs. For veteran Agents, listen to their calls to determine if they are still using these fundamental questions. Veteran Agents can get complacent and stop using fundamental questions because they "know better" or "can tell what someone needs" without asking. If you hear that behaviour on the phone, re-emphasize the importance of asking the right questions through role-plays with those Agents.

#### 4. Do Agents truly listen or just make assumptions?

Here is another area where veteran Agents sometimes lose sight of the fundamentals. They will ask one or two questions and quickly jump to a conclusion rather than listening to the customer. Even if the Agent is correct, the customer needs to feel heard, respected and understood. How would you feel if someone cut you off while speaking and then pitched a product at you without listening to your needs? As a Coach, help your Agent regain the fundamentals of listening: let the customer speak without interrupting, paraphrase their key points and ask pertinent follow up questions to discover their needs.

#### 5. Do Agents have enough product knowledge to recommend the right solution?

First, are your Agents giving out the correct information? If they are not, you may need to run a product knowledge sales huddle or update your online Agent knowledge base. In addition, if your Agent puts customers on hold frequently to look up information or to ask their supervisor for help, consider giving that Agent additional product knowledge training.

#### 6. Do Agents discuss features or benefits?

Focusing on benefits is a fundamental sales skill. How does

your product help your customer improve their life? If your Agent merely re-states product features such as long battery life, coach them to focus on the corresponding benefit: "You can use our product all day long, without having to look for a power outlet."

#### 7. Do Agents attempt to close the sale?

Closing is a fundamental sales skill. However, it can also be intimidating. If you hear hesitation when your Agent asks for the sale, or upward inflection in their voice (which can be perceived as selfdoubt), role-play closing scenarios with them to improve their confidence. Also, provide them with closing techniques. For example, ask the client to make a minor decision such as, "Do you want it in red or white?" If the customer chooses a colour, that implies they are buying the item. You can also illustrate various closing techniques during a team huddle to help your entire team improve.

Listen to your Agents' calls and evaluate if they are following these seven fundamental sales skills. Then use one-on-one coaching sessions and team huddles to reinforce these foundational skills and boost your team's sales results.

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# Banking & finance: impenetrable walls or call center success

By Angela Kabir

anking and finance corporations so large that their existence seems impervious to mere mortals. Living, breathing entities, seemingly undeterred by the plethora of human activity pulsating within their hallowed halls like blood through the veins of these monolithic mammoths.

Not the traditional fare for a typical call center. This segment requires a professional sales and marketing company with knowledge and experience far outweighing the common call center. Few of these niche sales and marketing call centers exist in Canada. Experience and knowledge are hard to come by but when one such company is discovered by the financial industry banks line up for their services.

The reason is simple; refined customer service, advanced technology, and measured results. And banks like results

Banking and finance also like refined customer service and technology. So much so that when they find a service provider that they can trust with their most valued asset, their customers, a long-term relationship ensues.

So how do you establish such a unique call center? It starts at the top with senior management fully understanding the banking/financial environment and being hands-on through all phases of design, implementation, and analyses of campaigns involving corporations of this nature. Their experience and knowledge befitting the level of expertise require. And their approach must be different towards businesses such as sole proprietorships, partnerships, and corporations, as opposed to their approach toward consumers.

In the consumer realm they must understand the consumer's lifestyle, goals, and vision, from life goals of where the consumer wants to be at different stages in their life of five years, or ten years down the road. Understanding the consumer's vision of children's education, retirement plans, or their risk tolerance for investment. Call Center Senior management must also fully understand the business owner's vision for their business in terms of growth, cash flow or credit, and succession planning. As well as preparation and plans for unexpected events from dissolved partnerships to growth by corporate acquisition, including shareholder expectations.

Call center customer service representatives (CSR's), well trained in consumer, and business-to-business acumen must then seek out this market intelligence by understanding the needs of business and consumer customers. Discussing growth and determining what the customers require positioning the financial institutions as partners, to grow.

This approach if understood, discussed, and implemented create long-term relationships.

So, how does a call center train their agents to tackle such a crucial segment? Do they even try? Well, most don't, or can't.



The one's that do, however, establish themselves as sales and marketing support partners to powerful financial corporations eclipsing the mantle of a typical call center.

The CSR's are handpicked for these campaigns and laden with experience, both personal and professional.

You don't want to tackle established corporate finance with inexperienced sales reps; you need mature, educated, articulate personnel, comfortable in speaking and understanding finance on a more personal, consumer level, and yet well experienced in business-to-business conversations.

A data-driven call center is able to score each behavior and nurture clients based on the scoring, and then alter the scoring as the goals of the client changes.

A dynamic process that only an astute, experienced call center would have the understanding of, and the ability to continuously adjust and make these modifications.

The highest technology available is the minimum for a call center sales and marketing company, and is a necessity to do business with the banking/finance segment. Advanced technology is needed to design and collect market intelligence, for scoring and nurturing, tabulation and analysis of data.

A call center with a refreshingly different approach, with management capable of complex campaign design, implementation, and acquisition of actionable data is required.

Trained, experienced CSR's leverage the added advantage of technology to assist them in bringing lead to revenue.

Creative and innovative management understand this holistic approach and can design and implement these processes utilizing technology with trained CSR's capable of in-depth dialogue with consumer and business clients alike.

The key is to recognize that in the banking/finance realm it is no longer just about selling products or services; the world has changed. Financial institutions now need to gain a more personal understanding of each customer individually and forge a partnership with them.

Consumers and businesses are looking for a partner who is going to help them grow, and to be there when they need them.

This is where the unique call center fits in, with knowledgeable leadership who grasp a complete understanding and realization of these integral partnerships.

**Angela Kabir** is President / CEO of PR Exchange Group of Companies Inc.

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# Reigning in employee misuse of Internet and social media

#### **By Curtis Armstrong**

he internet and social media have changed our world. Communications which 20 years ago took days if not weeks to make their way throughout a workplace, now take mere seconds to reach tens, hundreds, and even millions of people around the world. Theoretically, this unprecedented access to information should mean we are better informed and more productive than we were in any previous generation. But are we?

As employers we know that not every aspect of this new technology is positive. Studies suggest access to the internet during business hours can reduce workplace productivity by up to 40 percent. Workplace bullying and harassment is also on the rise, due in part to the ability of colleagues to reach each other secretly via the internet rather than publically by the water-cooler. And, the anonymity of the internet has enabled many a malevolent blogger and tweeter – often an employee – to destroy products, brands, and entire companies.

Fortunately, much of this behaviour can be minimized when employees understand the parameters and consequences of internet misconduct. To this end, we can divide internet misconduct into two categories:

- 1. Misconduct while on the job; and
- 2. Misconduct that may take place outside of the workplace.

The first form of employee internet misconduct is the easier of the two to identify and discipline. Relatively simple technology allows employers to track time spent online, sites accessed, and content downloaded and/or uploaded. If misconduct is identified, it can and should be dealt with appropriately.

The second form of misconduct can be more problematic. Canadian courts and labour arbitrators have traditionally drawn a line between an employee's work and private life, declining to uphold discipline for "offduty" conduct where there is no clear connection to the workplace. In some cases that connection is obvious – for example, where the company is criticized publically. In other cases, the line is not as clear. Consider the case of the tragic death of high school student Amanda Todd.In the aftermath of her suicide following relentless bullying and harassment an employee of a retail store in Ontario, a man with no apparent connection to Ms. Todd, posted to Facebook the comment: "Thank God this b---- is dead". A Calgary woman tracking Facebook comments about Ms. Todd saw the posting, and when she viewed the poster's on-line profile saw the name of his employer. She reported the posting to the employer who immediately fired the man because the posting was contrary to the employer's values and the poster could be publicly identified as its employee.

Was the man's posting sufficiently connected to the workplace to justify his termination? We may never know, as the case has not been adjudicated. It is, however, a thought-provoking example of how on-line comments, even ones not directly related to the workplace, can have a workplace impact.

What then are the steps that can be taken to minimize the risk to business caused by employee misuse of technology and social media?

#### Step 1: Have an Internet Use and Social Media Policy

A clear, direct internet and social media policy is essential. This includes advising or reminding employees of the following:

- They should have no expectation of privacy as it relates to the use of company technology
- The employer has the right to monitor computer usage within and about the workplace
- The employer monitors social networking sites (if accurate)
- The limits to internet use during work time (total prohibition is rarely reasonable or practical)
- That online communications may be seen by anyone (including the employer, co-workers and members of the public)
- The prohibition on publishing negative comments, not only about the employer, other employees, or customers, but any comments that may negatively affect the employer's reputation
- The prohibition on disclosing confidential information about the company, employees or customers
- Applicable, companion policies, such as harassment, confidentiality, conflicts of interest and privacy, etc.
- The process for addressing complaints
- That violation of the policy may result in discipline, up to and including termination for cause

#### Step 2: Monitor Usage

An employee who believes internet misconduct cannot be seen has less of an incentive to behave, which is why monitoring internet and social media use inside and outside of the workplace is the second essential step.

Inside the workplace requires the implementation of technology that has been available for years, and is

not expensive. .

Outside the workplace provides the ability to monitor public social media communications around the world, identifying those which fit a profile the employer determines it wants/needs to track.

#### Step 3: Implement and enforce

In our experience, a well implemented policy has four key components:

Relevance: Management and employees should be educated on how and why the policy is relevant to and will apply to their day-to-day responsibilities.

Proportionality: The impact of the policy must be reasonable and rational; neither overreaching nor attempting to attain a 'gold standard'.

Consistency: The policy must be applied consistently and fairly so as not to lose credibility within the workplace.

Flexibility: The policy must be a living document, able to adapt to and reflect the organization's business realities as they may change from time to time.

#### Final thoughts

For better or for worse, the internet and social media have become a workplace reality. The objective for employers is to harness the benefits of this exciting technology, while at the same time protect the business from its dangers. This can be accomplished by having a clear and unambiguous internet and social media policy, monitoring internet and social media usage as it relates to the workplace, and enforcing the internet and social media policy consistently and fairly.

Curtis Armstrong is a lawyer with Sherrard Kuzz LLP, one of Canada's leading employment and labour law firms, representing management. Curtis can be reached at 416-603-0700 (Main), 416-420-0738 (24 Hour) or by visiting www.sherrardkuzz.com.

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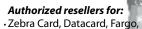
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