

The inside story on marketing automation

How Professional Advantage manages client relationships



Professional Advantage works with companies who seek to improve the performance of their business through the application of technology. Over the years it has assisted more than 1,000 clients to increase revenue and profits, control and reduce costs, improve efficiencies and achieve better value from information. The company employs more than 250 people in offices across Australia, the UK and the US.

Marketing basics: a view of the customer

The foundation of Professional Advantage's business is its relationship with clients. This requires more than simply knowing who the main contacts are within an organisation. It demands an understanding of the client's business, their needs and the ability to apply technology to help achieve business goals.

Since the early 2000s Professional Advantage has been achieving this with the help of Microsoft's Customer Relationship Management (CRM) system. The software contains customer and prospect data and is the bedrock of all activity. Each client record contains information regarding the equipment and solutions used by the client, maintenance contracts, every service call ever placed, every conversation with a Professional Advantage Business Development Manager, every direct mail piece issued and every Professional Advantage event that the client has attended.

One of the heaviest users of CRM is Professional Advantage's Support team. Lisa Williamson, Support Manager, explains, "We're in the system all day. The first time a customer calls in with a question, it is logged into CRM where it is given a unique case number. All subsequent conversations, emails and so on associated with that case are tracked through that number until the issue is resolved." This removes reliance on any single person and ensures no staff absences affect the company's ability to provide swift issue resolution.

A QlikView dashboard highlights up-to-the-minute data such as how many cases have been logged or are awaiting resolution, allowing Williamson to identify potential bottlenecks and redistribute workloads for optimal turn-around times. Data is also made available to the client via a secure portal, enabling them to keep tabs on how their support issues are being managed.

Reports and analytics highlight changes in call patterns which may indicate an issue or a need for additional training. "It gives us the opportunity to proactively check if business processes have changed and allows us to have more detailed and meaningful conversations with customers," Williamson says.



At a glance

Company

Professional Advantage

Industry

Information Technology, Professional Services

Number of employees

250+

Problem

A desire to continually improve the reach, efficiency, effectiveness and relevance of marketing to prospects and customers.

Solution

- Microsoft Dynamics CRM
- ClickDimensions
- QlikView
- SQL Reporting Services

Benefits

- CRM data enables professional service, personalised support and continuity of knowledge across a large, international client base.
- Full website and email tracking with data captured automatically and recorded against contacts in the CRM system.
- Automation makes it faster, cheaper and easier to maintain relevant, ongoing communication with clients and prospects.

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Microsoft Dynamics CRM is also extensively used by Professional Advantage's account management team. They use the system to keep track of all correspondence, conversations and to identify what has been delivered to each client. The data guides them when identifying future requirements, product life cycles and upgrades, and areas where extra value could be added. It's also used to manage the company's biggest asset – the annual maintenance contracts.

Michael Foertsch, Professional Advantage Customer Service Manager notes, "Account Managers use the data to manage their sales opportunities and it helps me to manage the pipeline. We keep a complete life history of the client within CRM so we know why and when they started working with us. This allows any account manager to pick up an account and know what has been done in the past."

Taking marketing to the next step

Within a short time Microsoft Dynamics CRM had become a well-entrenched tool for Professional Advantage. No one could imagine the business without it and the company is continually looking for new ways of using the data to improve customer and prospect relationships, reduce the cost of sales and increase profitability.

The answer to this search arrived in 2011 when the marketing team was introduced to ClickDimensions, an automation solution that sits on top of Microsoft Dynamics CRM to support email, web and social marketing initiatives. The software offers a way of easily issuing and managing electronic direct mail pieces, digital communications and invitations. It contains exceptional web tracking functionality, allowing marketers to monitor the behaviour arising from their communications. One of the most appealing aspects of the software however, is the fact that the cloud-based solution required on average just 15 minutes to install.

"Our customers rightly expect that we know their business and by keeping a centralised system that tracks this information we can deliver a connected customer experience through any area of our business."

Given the speed of deployment, Professional Advantage's marketing department decided to conduct a software trial. Marketing Manager Craig Panigiris says, "One benefit of cloud based solutions is that there is no extensive implementation. With ClickDimensions it was simply a matter of connecting the software up to our Microsoft CRM database and allowing data to flow into it. It mitigates a lot of the risk of deployment."

The first test was simple. ClickDimensions code was added to some of Professional Advantage's highest trafficked website pages, allowing the software to track visitor behaviour. Immediately reports began to provide information such as which pages were most frequently visited, how long visitors spent on each page and where they travelled to next. "Some of the data was very revealing," Panigiris says. "It allowed us to really get a feel for what visitors were looking for."

The tests so impressed the marketing department that ClickDimensions has since been rolled out across all areas of Professional Advantage's Australian operation. In the US office a ClickDimensions trial was recently concluded and the software is about to be adopted as a permanent marketing tool. It's a similar story in the UK office.

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Turning prospects into leads

Today Professional Advantage uses ClickDimensions to manage events, marketing emails, social marketing initiatives, newsletters and subscriptions. Reports show coordinators how successful their campaigns are – including information such as how many people opened an email or how many clicked on a link.

Web tracking shows what visitors are searching for and alerts staff to any sudden rise of interest in a topic. "It allows us to be proactive in terms of producing content to drive greater engagement with prospects," Panigiris notes.

The system is also used to build profiles of prospects visiting the company's website, regardless of whether the person is known to the company. ClickDimensions tracks where and when they visit, what they are looking for and how long they spend there. If or when the prospect eventually provides their name and contact data, past behaviours are matched to the name and added to the CRM system. As the profile builds ClickDimensions automatically applies a lead score that allows marketing staff to identify how engaged the prospect is likely to be.

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The software has also become integral to event management. Panigiris says, "We've automated the entire registration process, from collecting data about who was invited and who has registered, to sending confirmation emails and recording the registration as a campaign response in our CRM." It's saving the company time and the automation is ensuring greater accuracy in the data.

Within the next 12 months Panigiris is keen to take on additional functionality including automated client surveys and a drip nurturing program. He is enthusiastic about the software and believes the potential to improve marketing results will only increase over time.

"ClickDimensions is a dynamic company. Their products are always evolving but because theirs is a cloud based solution, we don't have to worry about trying to install software to a server. Any upgrade is managed on their side, within their system."

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For Professional Advantage, the combination of Microsoft Dynamics CRM and ClickDimensions has provided the missing piece of the marketing/sales puzzle. ClickDimensions bridges the gap between initial expression of interest and a hot-to-trot prospect. It allows marketing to actively manage relationships, educating and guiding leads through the early stages so that sales staff can focus their efforts on the prospects of greatest potential benefit. In doing so it is improving relationships, reducing costs, increasing profitability and helping marketing to deliver ever-greater value to the business.

For more information

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