Martec International and Its Use of Maximizer

Introduction and Background

Martec International was established 33 years ago as a consulting company dedicated to the retail industry. It was formed in the UK and progressively won clients covering 35 countries in all regions of the world. Roughly 25 years or so ago, Brian Hume, the Managing Director of Martec, found Maximizer on a shelf in a CompUSA store in Dayton, Ohio. In those days it was a single PC copy, no networking and its major feature compared to the competition of the time was that it could hold any number of contacts against a company record, without having to duplicate the company data on every contact. This was a big deal back then!

Martec adopted Maximizer and has stayed with the product through every upgrade in the last 25 years and now uses the latest cloud version. Early on in their journey, Martec met Collier Pickard, then (and still) a key Maximizer partner in the UK and have been supported by us ever since. Along the way Martec moved into instructor-led training teaching retail skills, subsequently became an early adopter of e-learning and latterly also moved into the consumer goods sector.

A year ago, due to approaching retirements, Martec decided to downsize the company and focus on its training business. In recent months the company has been restructuring its processes to focus entirely on the various flavours of e-learning and web-based training and has been increasing its reliance on Maximizer in order to run a completely digital business with maximum efficiency.

This case study will explain how Maximizer supports the company's marketing, sales, and client service activities.

The Client Base and Database

Early on in Martec's development, the cost of advertising was prohibitive, so the company needed to develop marketing and sales programs at an affordable cost. Direct mail was the answer. The very first database was built in dBase III and was coded in house. The initial database consisted of 120 people, all key contacts of the founder. Gradually the database grew and roughly 25 years ago dBase III was dropped in favour of Maximizer. By then the database had grown to about 3,000 people. At the time of writing it is now 45,000 people and takes some serious maintenance, but more about that later.

Originally, extensive use of paper-based mailing was made entirely because volume email wasn't available when Martec first started. Along the way, they learned that the secret to getting good response rates was twofold:

- Make sure the content is interesting, relevant and will help clients address their needs.
- However big the database, only mail the people that will most likely be interested in the specifics of the mailing.

To achieve this, Martec created a unique coding system for the companies and contacts in their database and refined this over the last 25 years. A key feature in Maximizer is the ability to create your own fields, known as user defined fields (UDFs) and this capability is used extensively to code the data in ways which allows them to make mailing selections that are very precisely targeted. Even now, with 45,000 people in the database, the average mailing (or campaign of mailings) is 3,000 to

5,000 individuals. One indicator of how well they target mailings is the unsubscribe rate, which averages 0.3%.

Today Martec's target client segments are:
- Retailers
- Wholesalers
- Consumer goods manufacturers
- Technology companies that sell products and services to retailers and consumer goods companies.

The bulk of their database covers the UK, Mainland Europe, and North America, but Martec also has clients in Asia Pacific, Africa, the Middle East and South America. Consequently, the database must handle multi-currency for recording company annual sales, the value of sales opportunities and so on.

Marketing

Martec's marketing revolves around three prongs:
- Two web sites
- Extensive email marketing
- Social media marketing focused on LinkedIn and YouTube.

The two websites are - www.martec-international.com, which describes their wider offer and www.retaildevelopmentacademy, which is an e-learning portal where individual learners can buy a class, pay by credit card and get instant access to the training. Several clients take corporate licences and run-on training on their in-house systems.

Over the years Martec moved from a series of individual mailings to organised campaigns and the campaign functionality in Maximizer has been a great help with this. They currently use a 6 part structure in campaigns and learned that the best prospects open an average of 4 of the 6 emails, quite a lot open 3 and then 2 and 1. The analysis available in Maximizer, especially in the campaigns module has been very useful in helping analyse the impact of their mailings.

Collier Pickard introduced us to Maxmail, a mailing house that integrates to the Maximizer software. The benefit to Martec is that when people unsubscribe, Maxmail updates Maximizer automatically. Collier Pickard also emails a file of bounces from Maxmail resulting from Martec's mailing activities. These reports are imported into Maximizer automatically. Unsubscribers are not deleted from their Maximizer as they still want to know they are at the company, but they are flagged so they are not selected for future emails. Equally bounces aren't deleted either until they have been individually checked, as they have found that roughly half the contacts that bounced are still in those companies and bounced for reasons like their mailbox being full, being on holiday or have changed their email address.

The emails include links to various pages on their websites. Martec correlates the Maximizer campaign statistics with Google Analytics to try and assess the level of traffic the emails generate to their sites. A high proportion of Martec's site visits come from people who searched for Martec or the Retail Development Academy and this gives them a measure of how previous email campaigns have built brand awareness, name recognition and at least some understanding of what they offer.

They also get statistics on how many people clicked on specific links in their email letters, so can contrast the short term or immediate results with the long-term gains from brand building.

Opportunities

Martec uses the Opportunities module in Maximizer to track all enquiries or leads through the life cycle of a sale. They may take a phone call, receive a form from the web site, have a direct response from an email that has been sent out, get a referral or a call from a past client and so on. These are then set up as opportunities and then tracked through the various stages of enquiry, dialogue, submission of a proposal, follow up discussions (and sometimes revision of a proposal) to a win, a loss or an abandoned enquiry. Martec defined their own stages and a variety of UDFs to track and analyse the variables needed, both to progress a sale and to analyse trends and other key information. This structure allows them to calculate conversion rates throughout the stages of the sales cycle and support future forecasting.

As one example, one of their dashboards shows that their mailings generated a relatively low level of direct responses. This begged the question of whether the database was earning its keep. This in turn, led them to review the approach to campaigns and link the Maximizer campaign statistics to Google Analytics so they could get a much better idea of how the mailings were delivering.

Due to the way that UDFs have been implemented in Opportunities, they can now generate a time phased sales forecast for the year ahead, based on either confirmed orders or probabilistic estimates of likely sales by month.

Martec sells their classes and those authored by selected third parties, to whom they pay royalties every quarter. The base data is all in Maximizer, so Collier Pickard was commissioned to write a custom report calculating the royalty payments due to simplify Martec's payment process. This also allows them to provide an audit trail to partners if they request it.

Contact Scores

A recent innovation has been to develop contact scores. These are similar to lead scores in other marketing products. Some time ago, Maximizer introduced formula UDFs. So now Martec has a calculated score assessing the "value" of a contact in their database. This contact is assigned two points every time they receive a campaign mailing. This will be done even though they may not have opened the email, because they will probably have seen it sat in their inbox before they deleted it. Some will have read the email in their viewing pane, though this cannot be measured. If they open the email (as tracked by an image pixel in the email template), the contact is assigned 10 points. These updates are done automatically using the global edit function after each campaign email is sent out. Other activities cause their score to be increased. For example, if they receive a sales proposal they get more points, if Martec gets an order, they get more points and then other points are awarded if they engage with them in customer service activities after they become a customer.

Thanks to this reporting, Martec can now segment the database by customer points value. Though this part of this implementation is relatively new, they have learned some things already. They have a small percentage of contacts that open every email they send them. There is a very respectable percentage that opens 50% or more, but about 40% of their database doesn't open any. Now that they have the data another analysis showed that about 25% of the database never got selected for a

mailing in the last 18 months. About half of this was omissions on Martec's part, which can now be addressed. In the other half, the re-focusing of the company meant that they no longer sold products or services relevant to those people, so they could stop maintaining their records.

Before this Martec prioritised their database maintenance by last contact date. This is a UDF that shows when they last checked that the person was in that job. So Martec checked the oldest first. Now contacts are ranked by score, highest at the top and check those with the most points first, if their last contact dates are 9 months or older.

In future they will use the segmentation ability to target potential customers more precisely and perhaps couple this with different promotional offers.

Customer Service

Most of what Martec now sells is e-learning. Many people prefer instructor-led training to e-learning and see electronic training as second best. They have done a lot of work to make their e-learning more engaging and "stickier". One way we do this is "Ask the Expert". Their classes include an Ask the Expert link. If a learner does not understand some aspect of a class or wants to know how to apply something to their day job, they can click the link and fill out an email template describing their issue. It is emailed automatically to Martec's help desk. The help desk manager records the email in the Customer Service section of Maximizer and forwards it to the relevant subject matter expert to answer Martec guarantees a maximum turnaround time on these questions. The enquiry is recorded once it has been received and when answered, it is put into the system and Martec analyse how well they meet their performance promise. They also give the person an extra 5 points in their contact score for engaging with them. The more they engage, the more likely they are to buy another class in future. They also provide corporate clients with reports from the system on how many questions their learners asked and how quickly they were answered. This is one small part of encouraging corporate clients to renew their licences each year.

At the end of each class module a person studies, they are asked to complete an end of class survey by clicking a link to Survey Monkey. If they complete the survey they are sent a nice certificate of achievement by email. If they complete the mastery test at the end of a suite of classes, they are mailed a nice printed certificate on a stiff card that looks like a University degree certificate. Since this was introduced the number of survey responses has mushroomed.

The survey results are very beneficial as they provide detailed input into Martec's future product roadmaps and great information for marketing purposes. For example, 400 students have given them an **average** score of 85% in response to the question "Will this class help you do your job better?".

Martec manages the workload for this initiative in the Maximizer Customer Service module. They have set up UDFs to track which modules were studied, whether the user completed the module surveys and the relevant dates, and whether they have been emailed or mailed the certificates that they have earned. Martec runs a two weekly process to select those due to get a certificate and email the electronic ones directly from Maximizer. Those that must be printed and posted are tracked in Maximizer as well. This process was becoming unworkable prior to implementing it in Maximizer, because of their success in getting learners to complete surveys. Now they have cut the hours required to provide this service significantly.

Another side benefit of this is that they can see which modules the learner has studied and are now building insight into developing new study paths and potential new products that they should build. Martec also sends periodic summaries of the survey results to their corporate clients for their own learners, highlighting information like the example above. This is another step in influencing their decisions to renew their licences.

The customer service module is also used to track when the licences expire for individual purchasers, which them prompts Martec to send nudge emails at one month and 6 months to make sure they have started and subsequently completed the class they purchased. At 11 months they are offered them a very low cost renewal so they can use the class as a look up or process refresh check at a very sensible price. Again, Martec uses Maximizer to manage this process.

Hotlist

The Hotlist component is Maximizer's task management function tracking tasks to be done on certain dates. As Martec steps through the various processes described above, they use the hotlist facility to make sure that the various events that need staff action get done when they should, as it is easy to overlook things when times are busy.

Dashboards

Maximizer includes a very good dashboard capability and Martec have built a series of dashboards to support their operational processes. These show things like:
- The quality of their core base data, the completeness of the coding and the age profile of the data. It gives an immediate assessment of how they are progressing on maintenance.
- An analysis of the source of opportunities or enquiries, e.g. email, web enquiries, referrals, etc. They break the total down by those that are won, lost or abandoned. This enables them to see which lead sources have the highest win or loss rate so they can prioritise resources effectively.
- The monthly trend in the number of leads plus an analysis of the currently active leads and what percentage is in each of their win confidence levels, rated from low to high. Also, the number of leads for each product offer. This allows them to identify changing trends in product usage. In the last year for example, there has been a noticeable surge in interest in RFID education in their market segments. This has led them to change development priorities on products.
- Martec has three dashboards that analyse different aspects of their customer service operations, so that they can stay on top of customer service delivery.

Summary

Brian Hume from Martec has reviewed their use of Maximizer in some detail with the objective of showing how closely woven it is into all their sales, marketing, product and service delivery processes. He went on to say – "*We wouldn't be able to run our business this way without a really productive CRM system, which is why we have been using Maximizer for so many years. Over this time, we have continually enhanced our use of the product, taking advantage of the upgrades as*

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the CRM experts

they became available. We have also been helped by the support from our partner, Collier Pickard, especially when we take on something new. Our latest example is Collier Pickard's Head of Support – Robbie Brand – who has made an important contribution to getting our contact scoring to work."

"Our use of the product significantly reduces the chore aspect of running a business and leaves our team with more time for the creative and stimulating aspects of their roles. Hence, we have no problem in getting our team to use the system to its fullest potential. This means that we can rely on the completeness and accuracy of information, which is another important consideration."

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