



Implementing a Customer Outreach Program

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During our daily business we are often presented with challenges. This can be driven by a change in the market place, a change in the services we offer or simply driven by your own desire to take your company in a new direction.

We found ourselves in a similar position in the year 2000 when O'Neil Software was undergoing a great deal of change. The introduction of a new product was well underway and a familiar face, Jim Teske, decided to move on to new ventures. Change can be a daunting experience, but it also opens up new opportunities and in October 2000, a key decision was made: we needed to understand our customers better, get closer to them and ensure that our products & services met their future needs.

We decided that we needed a Customer Outreach Program, although we did not call it that at the time. It started simply because it was clear that we needed to reach out and open our doors so we could determine what we needed to change over the coming years.

If you find yourself in a similar position remember the first big lesson we learned. A plan needed to be created and put into motion, but the key to success was going to be consistency, continuity and measurement. This was not going to be a one-week, one-month or even a one-year project.

The Customer Outreach Program that we had in mind was also going to be about changing the culture within our company. We needed to adapt and become a service company FIRST and a product company second. The enormity of this can only be understood when put into context. At that time, O'Neil Software was sharing resources with its sister company, O'Neil *Product Development*.

Many projects were put in place and continue to be adopted but initially we focused on improving communications. There were three key areas we addressed with that goal in mind and I shall use them as an example of what we did to improve communications.

The first item of business was to redirect the Sales team (now called the Business Development team) to have a stronger emphasis on working for customers, not just being focused on new sales. Their first initiative was to attend an intensive course in cross training. The intention was to ensure that whomever a customer spoke to, that team member was able to deal or redirect

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questions promptly - whether the question was software related, or about the records management industry in general.

Ask Yourself: If a customer contacts your office, do they always get a knowledgeable individual to talk with? If your team member cannot answer the question, can they redirect the call to someone who can?

Another change was the implementation of a totally new look and feel to our website. We wanted this to become a central resource for all our customers. We saw the web as the link to O'Neil 24-hours a day, 7 days a week, regardless of country or time zone. We wanted it to be an 'added value' tool exclusively for O'Neil customers. It was supported with the introduction of an electronic newsletter, something that was not quite so common back then.

Ask Yourself: Do you leverage the internet as best as you can? When was the last time you updated your website? Does your website actually benefit you and your customers? Do you use newsletters to communicate frequently with your customers and, most importantly, do they read it?



Finally we initiated a customer survey through an independent company, to understand how our customers felt about their relationship with O'Neil: from sales through to support and administration; and especially how we could better communicate.

Be aware that, when reaching out, you are likely to take a fair share of criticism along with the many positive comments. You cannot ask questions without sometimes getting answers that you do not want to hear, but it is those answers that are often the most important and telling. The survey results were also the first part of the measurement portion of our Customer Outreach Program. If you cannot measure results, how will you know if you are successful?

Ask Yourself: Do you know what your customers think of you? How do they feel about the sales process? What about after sales? What new services are they interested in? Can you measure your successes and failures?

So how did these three programs fair and how were they extended?

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The survey results immediately changed many of our communications methods, with the abolition of a quarterly printed journal and the emphasis placed on timely email news (see graph). Additionally we adopted the term “Strategic Partners” for our customers. I can remember three consultants teasing me at the first PRISM Conference as to what the term “Strategic Partner” meant but, I don’t hear that anymore – everyone gets it.

We also introduced a not-for-profit conference *led by our Strategic Partners for our Strategic Partners*. It is really important when you charge a fee for anything that is designed to create a two-way dialogue that this should not be seen as a profit center. On a smaller scale no fee should be charged as everyone is giving their time and energies and everyone contributes to this equally.

We also published the complete set of unadulterated survey results via the website and handed them out at our first Strategic Partner Conference. It was important to be very open with the results, both good and bad. We did this so we could openly discuss the results with everyone and understand them better

Ask Yourself: Are you ready to hear truthfully what people think of you? Are you ready to share those results with your customers to have an open dialogue? Recently I saw a notice from ArchivesOne who undertake such a study every year and compare it to the previous year and, yes, they share the results.

Holding our first conference was one of the best things we ever did. This brought together 75 Strategic Partners from different countries, backgrounds, markets and business sizes. During the 3 days it was held, we worked hard to understand the direction O’Neil needed to take and also managed to include some networking and fun. The key benefit was the sharing of ideas in an open manner, to create a vision for development. The vision later became known as our “Web, Wireless & Reporting Services Strategy” that drove us for the next 3 years but it was born at that first conference.



The success of the conference made us focus on being in front of as many customers as possible each year. In 2006, O’Neil team members will have attended 14 industry related conferences around the globe, all with the intention of meeting customers.

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With all the pieces in place, the goal was to achieve success by staying focused and determined to see through the changes. Today the results speak for themselves:

The Business Development Team handle as many calls “What should I do?” calls as they do sales calls. Through relationships with other vendor partners and consultants we try to support our customers as they grow. Know conversations don’t just involve a dollar figure.

Based on web statistics from October 2006, the website at oneilsoft.com now receives an average of *250 visitors per day*, reading documents and downloading files, spending an average of 9 minutes per visit. It has over 350 pages of information available and is updated *every month*.

The eNewsletter started off with a modest subscription of 126 people, over 70 editions ago. It now goes to over 4000 subscribers every month and in October, 2006 attained a *relative read rate of over 84.7%*.



The “Web, Wireless & Reporting Services Strategy” caused O’Neil to entirely re-think our development, but resulted in the winning of the “2005 Symbol® Technologies Enterprise Solutions Award for the North American Region.” *This would not have been possible without the direct participation of our Strategic Partners.*

So are we finished yet? I strongly believe that we’ve only just begun. We have learned a lot over the years, made some mistakes, done many things right and the verdict is still out on others... but we are listening and continually asking questions.

In March 2007, we will start again by hosting our 3^d Strategic Partner Conference with 150 attendees. Only 2 sessions involve O’Neil team members speaking, as all the rest are presented by our Strategic Partners who will learn off each other. We are able to sit back listen and learn some important lessons and insight ourselves. From this conference, I have no doubt that our future development strategy will be born.

So as I prepare for our next set of challenges and you ponder whether you should introduce your own Customer Outreach Program try the following steps:

Step 1: Decide what the goal for your program is. Is it to increase add-on sales or to improve and cement existing relationships? Without knowing the goal you will not be able to determine if you

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achieved the results you desire. And desire is a good word as you have to have the passion and really want to do this (see step 4).

Step 2: Make your program a series of smaller, manageable projects and introduce them incrementally. This way you can adapt, modify and improve each individual project based on feedback. Things to consider include:

- Newsletters (email or print) – Inform and entertain your customers
- Website – Make it work for you rather than being a static page
- Open Days – Bring customers to you and share information and ideas
- Association Meetings – Get involved with local associations, such as ARMA
- Press Releases/Articles – Get involved with local newspapers & magazines
- Charities – Sponsor events or contribute to local causes

Step 3: Be consistent. The message you send, by whatever means you send it, has to be focused on achieving the goal. Mixed messages will be counter productive.

Step 4: Stay focused and continue the program. We can all point to many companies that have spent money on websites, newsletters and other projects only to let them languish. This is usually due to them not having a clear goal. You have to know why you are doing these projects and stick with them through the long haul.

Your customers are one of your best, in many cases, untapped resources. Get them involved in your business and make them your Strategic Partners.

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