

MarketService 2000TM

The most advanced database marketing and lead management system ever developed.



Executive Summary

A product of Wesner Associates

<http://www.marketservice2000.com>

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MarketService 2000™ Overview

Wesner Associates extends its software technology to the web, streamlining the way you work and making it easier to share access and analyze information for better results. MarketService 2000™ is easy to use and manage. It delivers new levels of productivity and intelligence, enabling users and organizations to get up and running quickly, stay working and achieve greater results.

Building a marketing program that will be successful in the long-term means building relationships with families you serve today and with the families you want to serve tomorrow. This translates to securing your place in the market today while laying the foundation for long term future growth. This is a goal we can all aspire to and database marketing is the key to attaining that goal.

MarketService 2000™ is an active system that automatically executes a state of the art marketing plan. It keeps you in touch with each prospect in your database by printing letters on a predetermined schedule. It manages the activities of counselors by printing call reports and reminders for counselor follow-up activity. It also generates reports that keep management informed of the activity of each counselor. It has reporting functions that analyze important criteria in the overall database that help management make well informed decisions regarding the sales and marketing program.

There are good database programs on the market today that print letters and offer reminder functions, but they are passive in nature, meaning they require someone to initiate the marketing or clerical function. They are "salesperson driven," and they do not provide a marketing plan. MarketService 2000™ is "sales plan driven." It does not stop when the salesperson does. It will manage and execute all activities according to the structured marketing plan.

To better understand how MarketService 2000™ works, it is helpful to understand the underlying marketing and sales philosophy which dictated the design of the system.

Marketing and sales efforts can be simplified into the following steps:

1. Identify a prospect.
2. Introduce prospects to your products and services.
3. Cultivate the prospect through marketing activities.
4. Educate the prospect so they can make a well-informed decision and finalize the arrangements when the prospect is ready to buy.
5. Continue to maintain a relationship with the client/family to generate and obtain additional referrals and sales.

The Harvard Business Review conducted a study that informs us that regardless of how aggressively you (or your competition) approach the market; only five percent of the families in your market are receptive to the idea of receiving information from you at any given time. Database marketing can continuously identify that five percent and nurture the other ninety-five percent in a manner that is cost effective, non-threatening, and professional, until they are ready to make a buying decision. One of the most basic elements of successful marketing is that you must be in front of the family when they are ready to buy, not when you are ready to sell. MarketService 2000™ has been designed to help you accomplish this with incredible ease.

Another study conducted by New England Digest tells us that 87% of people that ask for information will purchase. However, only 37% will purchase within 30 days of initial contact. The rest will take up to two years to make a buying decision. MarketService 2000™ will keep you in contact with this significant sector of your market effortlessly.

When a prospect says no to your request to set an appointment or close the sale, one of two things has to happen for the prospect to reverse their answer and say yes. The prospect must experience a life-changing event such as a death or illness that makes an impact, or they may reconsider their decision to purchase based on meaningful new information. MarketService 2000™ will nurture those leads by offering a continuous time release of new information in a non-threatening manner.

Marketing research conducted by the Dartnell Corporation has determined that 80% of all sales are made after the fifth sales contact. Yet:

- 48% of all salespeople give up after the initial sales call.
- 25% more give up after the second call
- 12% more give up after the third call
- 5% more give up after the fourth call

That leaves only 10% of all salespeople that continue past this point. 90% of all salespeople quit before they reach this point. The bottom line is the persistent 10% of all salespeople are making 80% of all sales.

These statistics give us definitive evidence that the business of pre-need selling is not a one-call business. Considering the cost of the products and services we provide, it is easy to see how the selling cycle is getting longer. The professional salesperson must stay in contact with the prospect over an extended period of time. MarketService 2000™ has provided for this stage of the sales process with a passive marketing sequence.

MarketService 2000™ is the single, most valuable tool available to help you increase your market share and secure future long-term growth.

Web Based Advantages

Constant Improvement with No Costly Upgrades: MarketService 2000™ is improved and updated on a daily basis. Most recently we have added the National Do Not Call scrub service.

Easier to maintain. One out of five companies does not back up their data correctly or at all. Wesner Associates, Inc. is a company with more than 25 years of computer experience that has redundant backup and disaster strategy plans in place so your data is safe and sound.

Easier to train, turn key implementation. With no software to install, training is a phone call away. Initial training calls for approximately one hour in length is enough training to get someone started and on their way to increased sales.

Ability to email reports- We have an enterprise report server exclusively to send data reports to managers, users, or anyone that uses MarketService 2000™.

National Do-Not-Call Compliance

With companies being subject to fines of up to \$11,000 per violation and two million families registered, businesses are scrambling for ways to guarantee the integrity of their databases. MarketService2000™ is the answer. Now your company can easily put its Do-Not-Call List on autopilot so your sales force can call and stay in touch with potential clients without fear of costly violations.

Information Managed By the System

Information about the families in your market is the largest and most important area of information you will want to collect in this system. Accumulating this information over time will enable you to use the system to market to families based on what you know about them, building on your relationship with them and making your efforts much more effective. This is the essence of database marketing. There are several screens of information for each prospect/family in the system.

Contact Information: Name, address, phone information and email information, along with fields to categorize their status as a prospect, where the lead originated, and the counselor to whom they are assigned.

Marketing Plan Information: Details about the family's history in terms of events from the marketing plan along with details about event(s) scheduled to occur next.

Purchase Arrangement Information: A detailed record of any arrangements they have made with your firm.

Notes: There is a screen for each family where you can "free-hand" as many notes as you wish.

Company Defined Information: Specific data the company has determined necessary from each prospect that is not already defined in the system.

Customizing the Information

We designed MarketService 2000™ to offer you the most comprehensive database marketing and lead management system in the industry. While the fields, forms, and functions provide the framework to meet this objective, the true measure of accomplishment lies in the system's ability to meet your needs and provide information that is real to you.

Marketing Plan

- The number of contacts that can be active and properly managed is far greater than any application requiring constant manual feedback.
- All families are handled in accordance with the plan, ensuring a representation of your firm that is consistent, professional, and effective.

- If a Sales Counselor takes a vacation or leaves the organization, contact with his/her families can continue uninterrupted

Understanding Events

At the core of the system is a marketing plan that drives and directs all contact with the families in your market. The plan is made up of many events, which include over a hundred plus marketing letters to the families and reports for follow-up calls. Once a prospect is activated, the system processes sequences of specific letters and call reports based on the criteria set in the plan. *With literally the click of a button, the system finds all records with an event due, generates the events, and updates each of the records with the appropriate next event and next event date. It is this “engine” that provides several of the system’s benefits:*

- Nothing “falls through the cracks” because the system keeps all contacts moving forward with or without feedback.
- If feedback is necessary in order to advance the process and it is not received in a timely manner, the system automatically generates a management report.
- Administrative requirements of the Sales Counselors are reduced to an absolute minimum, giving them more time to spend with families.

The marketing plan is made up of many “events.” There are basically three types of events:

1. Letters to the families.
2. Call Reports for Sales Counselors, indicating a follow up call to the family is due.
3. Management Reports for Management, indicating a lack of feedback from the sales counselor regarding the follow-up call.

The Plan provided with the system consists of approximately 100 different events. Each event has a set of specifications associated with it. The three primary event specifications are:

1. What document, if any, will be printed when the event comes due (a specific letter, a Call Report, or a Management Report)?
2. Which event will automatically be set in the family’s record to follow?
3. In how many days the following event will become due.

Sample Scenario

To follow-up on a family who stops in the office to request information, the Sales Counselor requests an Event 1 (Thank You for Stopping by Letter) to be sent to the family. The System Operator or Sales Counselor enters Event 1 in the family’s record and when he/she selects the Process Events feature, the system will:

1. Print Event #1 Letter and corresponding envelope.
2. Add the event to the family’s event history.

3. Update the family's record to make the next event due an Event 30, an Initial Call Report.
4. Schedule the Call Report or Letter to be due according to the plan.

During Process Events the system conducts this same process for all records with an event due regardless of the number of records or different events in the process.

Marketing Plan Flexibility

The marketing plan provided with MarketService 2000™ has had been developed by Wesner Associates; it has been tried and proven with many clients over many years. However, one set of letters/events cannot be all things to all organizations. It is natural that you will want to modify the plan and some events in it in order to match your organization's particular needs and style. The system has been designed to give you full control of *your* Marketing Plan. Events can be added, removed, or modified in order to tailor your Marketing Plan as you wish. Below is a list of some of the things you can do with the options available:

- Add new events and new letters
- Modify letters
- Change the order of events as they will automatically occur
- Change the timing of events as they will automatically occur
- Set the event to allow alteration of timing on a case by case basis

Database Profiles & Sales Reports

With the rapid advancements in computer technology in recent years we've all developed the ability to produce enormous amounts of "data" with little effort. For owners and managers the key to taking advantage of this wonderful capability is to *reduce* the volume of data we generate to include only information that is most useful and meaningful.

There are several important factors to consider in the management of a database marketing strategy:

1. The *content* of the database. Several categories determine the make-up of a prospect. It is important to know how many records you have in each of these categories. Simple grand total record counts are very ambiguous and can be misleading.
2. The *level of activity* in terms of mail correspondence and Sales Counselors' efforts, trends in that activity *and the results of that activity*.
3. *Summarizing your sales*. Where are they coming from? What marketing efforts work best? What are families buying?

MarketService 2000™ provides a great deal of information about content and activity through the Database Profiles module. The form allows you to choose between Profiles that are designed to provide information that is both "useful and meaningful." Displaying a graph and summary table

for any of these Profiles is as simple as selecting the Profile from the drop-down box at the top of the form and then clicking the Display button.

Profile Descriptions

Following are brief descriptions of the Profiles provided on the Profiles page; some measure content while others measure activity. Each one is preceded by the question it is designed to answer.

How many of the records in the database are truly prospects for our products and services?

Contact Type: Each record has a Contact Type, categorizing the prospect's status as a prospect for particular products and services. This profile provides a summary count of each category.

How were the names in the database originated?

Lead Origin: Each record has a Lead Origin, indicating where the contact's name originated. This Profile provides a summary count of each Lead Origin.

Of all the records I have, how many have been "worked," how many are still active, and how many have not been worked yet?

Plan Positions: Summarizes how many contacts are in each sequence of the marketing plan, including records that have not been started in the plan yet and records that have been "worked" and deactivated.

Of all the records that are active right now, how many are in each sequence of the marketing plan – in other words, what is my marketing pipeline?

Every active record has a pending event that belongs to a particular sequence in the Marketing Plan. This profile, which by default is limited to active records, summarizes how many contacts are in each sequence.

How many calls are being made by each of the Sales Counselors?

Every time a Sales Counselor makes a call from a call report, the feedback to the system includes an update of the plans next event. Dates of these updates are stored in the system. This profile summarizes the counts of these updates per Sales Counselor.

Aside from the obvious results of calls that become sales, what are the results of all other calls the Sales Counselors are making?

A cross-section of the two profiles above, this profile summarizes all records that have been updated in terms of where they are in the marketing plan after the call, namely which sequence are they in.

Of all the records currently active in the database, how many have a letter in the mail?

How many are due for a Sales Counselor's call? And how many are overdue for a Sales Counselor's call?

There are basically three types of events: letters to families, call reports for Sales Counselors, and management reports for management indicating no response to a call report in the time allotted. This profile summarizes which event types are open for all active records.

Do I have an equitable distribution of leads among the Sales Counselors?

Counselor Distribution: Summarizes the count of records assigned per Sales Counselor; also includes count of records not assigned.

Of all the families in my database who I market to, how many have asked to be removed from the mailing list, not to be called, or not to be contacted at all?

Contact Restrictions: Each record has a Contact Restriction field indicating any requests to discontinue mail, calls, or both. This profile provides a summary count of the restrictions of all records. Records with no restrictions have a designation "Unrestricted" which also appears in the summary.

Benefits of MarketService 2000™ are:

- Increases sales and market share
- Attracts professional sales personnel
- Provides a proven sales plan
- Insures that no one falls through the cracks
- Puts management in control of the program
- Establishes structure for long term growth
- Accelerates your competitive advantage
- Increases customer satisfaction
- Reduces employee turnover
- Monitors counselor activity
- Guarantees follow-up
- Reduces sales cost
- Eliminates cold calling
- **Maintains do-not-call lists**

MarketService 2000™ Requirements

Internet access and a web browser are required to run MarketService 2000™. MarketService 2000™ supports Internet Explorer 6, Netscape, and Firefox browsers. Your connection speed to the Internet will have some effect on the speed of MarketService 2000™. The web pages have no graphics so the pages render quickly even with dial up Internet access. MarketService 2000™ is designed to run in screen area settings 800x600 or greater.

Pricing

Start Up Fee – Initial fee of \$299 per subscription is required for the creation of the Customer database and *two user accounts* with passwords. Start-up fee includes initial training, sixty days of free support and 1 time data import.

Monthly Service Fee – MarketService 2000™ monthly service fee is \$85 per subscription.

Terms of Agreement - **there are a month to month agreement, terminated by either party with thirty (30) days written notice.**

Additional Services

Support Policy – A scheduled appointment time is required for free initial training session. After initial training, we encourage all users to read the reference manual where many frequently asked questions are answered. Support during the initial 60 day period is intended to answer specific questions about operation of the software or assistance with issues beyond the user's control. It is not intended to replace the reference manual as a source of general information nor is it intended to provide initial computer training for new computer operators. Requests for special projects such as importing and scrubbing of mailing lists, data transfer, additional training, etc. are additional.

Additional Login Accounts – Each subscription is entitled to two system operator logins. Additional logins can be added to existing accounts for the monthly fee of \$19 per user.

Reference Manuals – The Reference Manual can be printed off the Main Page of MarketService 2000 as well as the Marketing and Sales manual at no charge. Manuals can be purchased from Wesner Associates, Inc. for \$59 plus shipping for each set. Each set includes Marketing and Sales Manual, MarketService 2000™ Reference Manual and all the letters.

Custom Email Reports - We can design and compile special reports based on the information in a customer's database. The cost for custom reports will be quoted on an individual basis. Customized reports can be delivered via Email to the customer on a regularly scheduled basis.

Data Importation and Deduping – We can import Contact information from mail lists or databases into MarketService 2000™ database. The cost of data import projects or deduping mailing lists will be quoted on an individual basis.

Do-Not-Call Scrub Service is available at \$55 per scrub.