

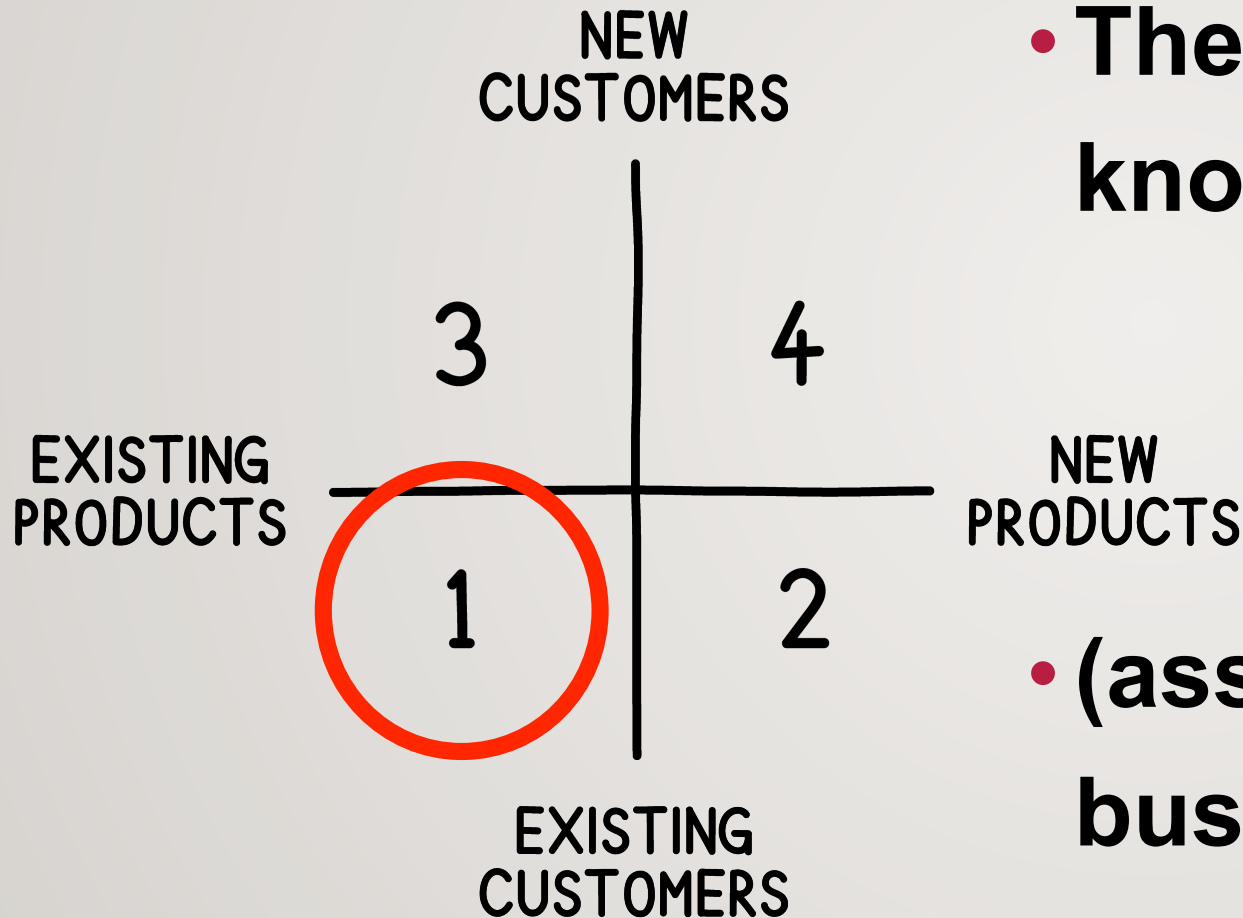
# Generating Leads from Existing Customers



# TODAY

- **Customer profiling**
- **A rough RFM analysis**
- **Decisions about metrics/KPIs**
- **Campaign!**
- **Transferring it to a new prospect campaign**

# WHY CURRENT CUSTOMERS?



- They know you,  
know your products

- (assumes you have been in  
business for a few years)

# CURRENT CUSTOMER BASE



- **Case Study: 10,000+ Customers Going Back over 8 years**
- **Ranked by annual revenue**
- **Regular email broadcasts**
- **Regular check ins**

# CHANGE THE DATABASE

- It's an accounting/finance database
- Total Revenue, First Invoice, # of Invoices, Last Invoice, Current Activity

	Total amount charged	Last charged date	Last charged amount	Total orders	YTD Orders (2019)	YTD Amount (2019)	First order date	Last order date
20	40022.5	01/29/20	0	250	444	10512.07	06/03/10	01/29/20
19	44044.4	12/19/19	200	155	65	4346.04	05/12/10	08/20/19
19	42931.9	01/30/20	0	22	26	35306.15	12/20/18	01/30/20
19	40000	12/19/16	0	2			12/16/16	12/19/16
17	38111.18	06/30/15	5608	7			04/04/14	07/15/14
19	33112.12	01/19/17	2000	8			01/16/15	05/11/15
20	29747.66	01/07/20	1500	15	11	4250	03/10/11	01/06/20
18	25995.18	07/24/18	747	88			11/28/11	07/24/18
12	25370.6	02/16/10	10222	9			09/29/09	01/13/10
19	24423.42	04/16/19	4762	17	4	4761.55	12/17/10	02/15/19
19	23591.89	10/31/19	0	51	7	879.82	12/05/12	10/31/19
18	23434	08/29/17	1050	4			06/18/15	07/26/17
19	22299.66	12/30/19	224	116	26	1424.63	04/29/11	11/07/19
19	22242.52	06/24/19	288	57	4	288.25	01/31/12	03/06/19
19	21907	06/18/19	270	103	19	540	08/28/09	06/18/19
18	21398.82	05/11/15	6399	1			03/01/15	03/01/15
20	21250	01/12/18	21250	2	1		12/20/17	01/09/18
13	20248.2	03/20/12	1773	7			10/01/09	02/03/12

# CHANGE THE DATABASE

- Append info for marketing insights
- SIC codes, Employee Size, Contact info, Location info

	Total amount charged	Last charged date	Last charged amount	Total orders	YTD Orders (2019)	YTD Amount (2019)	First order date	Last order date
20	40022.3	01/29/20	0	230	444	10512.07	06/03/10	01/29/20
19	44044.4	12/19/19	200	155	65	4346.04	05/12/10	08/20/19
19	42931.9	01/30/20	0	22	26	35306.15	12/20/18	01/30/20
19	40000	12/19/16	0	2			12/16/16	12/19/16
17	38111.18	06/30/15	5608	7			04/04/14	07/15/14
19	33112.12	01/19/17	2000	8			01/16/15	05/11/15
20	29747.66	01/07/20	1500	15	11	4250	03/10/11	01/06/20
18	25995.18	07/24/18	747	88			11/28/11	07/24/18
12	25370.6	02/16/10	10222	9			09/29/09	01/13/10
19	24423.42	04/16/19	4762	17	4	4761.55	12/17/10	02/15/19
19	23591.89	10/31/19	0	51	7	879.82	12/05/12	10/31/19
18	23434	08/29/17	1050	4			06/18/15	07/26/17
19	22299.66	12/30/19	224	116	26	1424.63	04/29/11	11/07/19
19	22242.52	06/24/19	288	57	4	288.25	01/31/12	03/06/19
19	21907	06/18/19	270	103	19	540	08/28/09	06/18/19
18	21398.82	05/11/15	6399	1			03/01/15	03/01/15
20	21250	01/12/18	21250	2	1		12/20/17	01/09/18
13	20248.2	03/20/12	1773	7			10/01/09	02/03/12

# WORK THE DATA - RFM

2-1-2.5	0-1-U	2-2+-20
0-1-2.5	2-100-20	0-2+-2.5
0-2+-U	2-1-U	2-2.+ -2.5

- RFM grid for scoring:  
**Recency**  
**Frequency**  
**Monetary**
- Scoring brings up "What?  
Why?" questions

# WORK THE DATA - RFM

Recency	Frequency	Monetary	GRID
		2-1-2.5 Count	8
		2-1-U Count	172
		2-100-2.5 Count	1
		2-100-20 Count	8
		2-2+-2.5 Count	42
		2-2+-20 Count	12
		2-2+-U Count	90
		O-1-2.5 Count	36
		O-1-20 Count	3
		O-1-U Count	619
		O-2+-2.5 Count	65
		O-2+-20 Count	8
		O-2+-U Count	371
Grand Count			1435

- **Recency: 2 yrs, Older**
- **Frequency: 100+, 2-99, 1**
- **Monetary: \$20K+, \$2.5K+, Under \$2.499K**
- **Start w/ concentrations**



# GO A LITTLE DEEPER

- **Just the 2 and \$20Ks**
- **SIC (maybe # emps?)**
- **Find Rhyming Co's**  
**In Billing**  
**In CRM prospects**
- **Ask questions internally**

GRID	SIC	EMP
2-2+-20	5198	50-99
2-2+-20	5191	100-249
2-2+-20	5191	20-49
O-2+-20	5072	20-49
O-2+-20	5063	100-249
O-2+-20	5063	20-49
O-2+-20	5033	20-49
2-2+-20	5033	100-249
O-2+-20	5032	20-49
2-2+-20	5031	20-49
2-2+-20	5031	50-99
O-2+-20	5015	20-49
O-1-20	5048	50-99
O-2+-20	5033	20-49
2-2+-20	5033	20-49
2-2+-20	5088	20-49
O-1-20	5088	20-49
O-1-20	5088	50-99
2-2+-20	5084	100-249
2-2+-20	5065	20-49
2-2+-20	5063	20-49
O-2+-20	5039	50-99
2-2+-20	5023	20-49

# CAMPAIGNS



- **Campaign #1 – Rhymers**
- **Asked “What’s special?”**
- **Started w/testimonial survey:**
  - “Before we worked together...**
  - “Now you find...**
  - “What’s surprised you...**

# CAMPAIGNS



- Took the findings to rhyming companies via account managers armed with new conversation points.
- KPI double # of “2-x-20’s”
- Re-training on discovery.

# FUTURE CAMPAIGNS

2-1-2.5	0-1-U	2-2+-20
0-1-2.5	2-100-20	0-2+-2.5
0-2+-U	2-1-U	2-2+-2.5

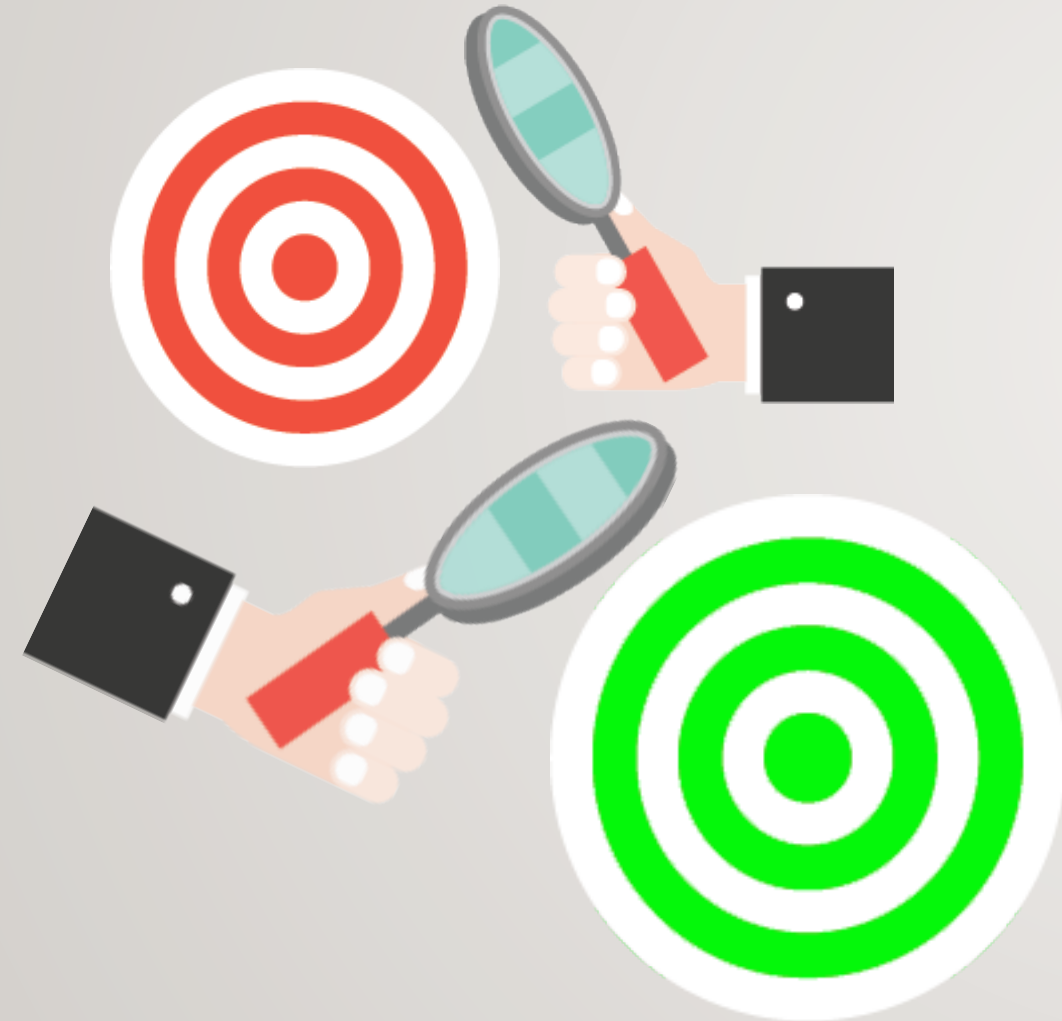
- Many ways to go, pick 2 was our advice.
- Moving the 2-1-U's to 2-2+-2.5's
- Re-engaging O-x-2.5's

# FUTURE CAMPAIGNS

2-1-2.5	0-1-U	2-2+-20
0-1-2.5	2-100-20	0-2+-2.5
0-2+-U	2-1-U	2-2.+ -2.5

- **Build audiences focused on the segment.**
- **Set up audience messaging and online assets to warm them up**

# “INTO THE WILD” CAMPAIGNS



- **Applying profiles to past prospect lists**
- **Creating new lists that match what you know and what you want**

# SUMMARY

- **Turn your dbase into a marketing dbase**
- **Use a rough RFM analysis for framing**
- **Before starting, decide on KPIs**
- **Get to work!**
- **Transfer new knowledge to cold lists**

# QUESTIONS?





# WHAT TO DO NEXT

- **Get your internal list together, start with some basic fields you already have like:  
Total Revenue, First Invoice, # of Invoices, Last Invoice, Current Activity**
- **Check it, sort it, come up with your first RFM**

# THANK YOU! LET US KNOW IF WE CAN HELP.

## Generating Leads from Existing Customers



INFO@LEADGENCOMPASS.COM

402-334-1824