

## CH Consulting Group Case Study: Customer Retention & Growth

### The Back Story

Company is a mid-sized BPO in business since 1970, and grew from a localized answering services company to a multi-channel national outsourced call center with call centers on both coasts.

Despite the company's multiple years of growth and success, 2012 was a very stagnant year with sales and marketing falling flat. In 2013 they lost money for the first time in the company's history. Additionally, the company had experienced extensive turnover in key business development and leadership roles in the previous 18 months.

The company's Executive Leadership team sought an industry expert to assist in their sales and marketing efforts with a goal of reigniting their staff and redirecting their efforts to ensure they met their 2014 business goals.

#### The Pain

- *Stagnant/Flat Revenue*
- *No Marketing Strategy or Budget*
- *Inability to Retain Business Development Leadership*

### CHCG's Role

The company contracted with CH Consulting Group to conduct an initial sales and marketing assessment to provide a plan and recommendations to get back on the growth track. After review and discussion of the results of the assessment, the company decided to follow through with a number of the recommendation including: restructuring the department, hiring a Vice President of Sales and Marketing and implementing a new sales plan and marketing plan, to name a few.

CHCG was brought in to fill the role of the new Vice President of Sales & Marketing for an interim period both to provide the leadership necessary to realign and redirect their staff. In this role, CHCG was also able to provide guidance and support for developing and executing additional recommendations from the SWOT analysis. CHCG was also contracted to assist with sourcing the ideal candidate to fill the new VP role long-term.

### The Outcome

#### ◆ **Staff & Department Re-Organization.**

Executed department structural enhancements and changes through the new VP role, staff reassignment/changes, as well as the development of a new Sales & Marketing Specialist position. Process included creating/implementing job descriptions, goals and compensation structure for all positions within the department. Resulted in improved company culture, employee morale and process efficiencies.

- ◆ **Targeted Sales and Marketing.**  
Redefined sales and marketing efforts through identification of target industry/verticals, associations for membership, tradeshows for attendance or exhibit. Establishes parameters for sales efforts to maximize efficiency and return on marketing investments.
- ◆ **Brand Management.**  
Initiated brand management tactics and executed website updates. Creates and strengthens the company's identity within the call center industry and those industries they serve.
- ◆ **Developed Comprehensive Marketing Plan.**  
Designed a marketing plan, including collateral updates and initiating a new email marketing campaign. Establishes consistency, marketing standards and ensures fiscal responsibility with regards to marketing spend.
- ◆ **Formalized Sales Plan and Budget.**  
Implemented formal sales plan and budget for 2014 including establishing parameters and policy regarding client size, scope of services, revised pricing and individual sales representative goals. Creates formal structure to manage and track sales progress to ensure goals are met. Increased productivity goals by more than 5 times the previous goals with increased marketing support.
- ◆ **Enhanced Communication.**  
Improved communication through the establishment of formal meeting structure, implementation process and inter-department communication processes. Increased teamwork within the department and company by opening open, pro-active communication processes to ensure that information is shared timely and appropriately to ensure maximum customer satisfaction with the sales and implementation process.
- ◆ **Sourced Perfect Candidate.**  
Identified ideal, industry-experienced candidate matching the culture the company wanted to create for the Vice President of Sales & Marketing position through full oversight of the recruiting and screening process. Conducted the hand-off with new VP ensuring a smooth transition of new processes and continued dedication to completing any remaining departmental changes and enforcement of the new departmental structure.
- ◆ **Operational Efficiencies Identified.**  
During the period of serving as Interim VP of Sales & Marketing and interacting with the other departments within the company, as operational issues/inefficiencies were uncovered additional suggestions and recommendations were provided to further enhance their business practices.
- ◆ **Increased Revenue.**  
2014 ended with a record breaking revenue year with a \$3 million increase over 2013.

### **Final Summary**

*Within 12 months the company had turned their sales and marketing slump not only into success – but into a year of record-breaking revenue and profitability! They now have a seasoned Vice President of Sales & Marketing and an effective marketing strategy in place. Revenue Matters.*