

targeted communication to increase membership

K/P Corporation

your needs our purpose

Computer software company

A worldwide leader in computer software, services and technology generates a significant portion of its revenues through a global partner channel. The community's members sell, service, support or build solutions incorporating the company's technology. Partners can select different levels of membership, and are encouraged to earn designations, which require completion of specific training elements.

One competency area is the small business designation. Joining this subset community within the larger partner channel allows members to access small business-specific resources and benefits, such as targeted marketing materials. To earn this designation, partners must have appropriate personnel complete a sales and marketing assessment and pass one of three technical exams.

Recognizing that there are more than 41 million small businesses worldwide to which it can market its products and services, the software company – a longtime client of K/P Corporation – was eager to grow this segment of its partner channel. The client turned to K/P to develop a multi-channel, “multi-touch” campaign to enhance recruitment of partners to its small business community.

■ CHALLENGES

While the steps necessary for earning the small business designation were outlined on the company's partner channel website, many members were either failing to take action beyond their initial opt-in to the training program, or were “stalling out” at some point during the process – particularly, at the critical step where personnel are required to complete and pass a technical exam – and ultimately, were not achieving the competency designation.

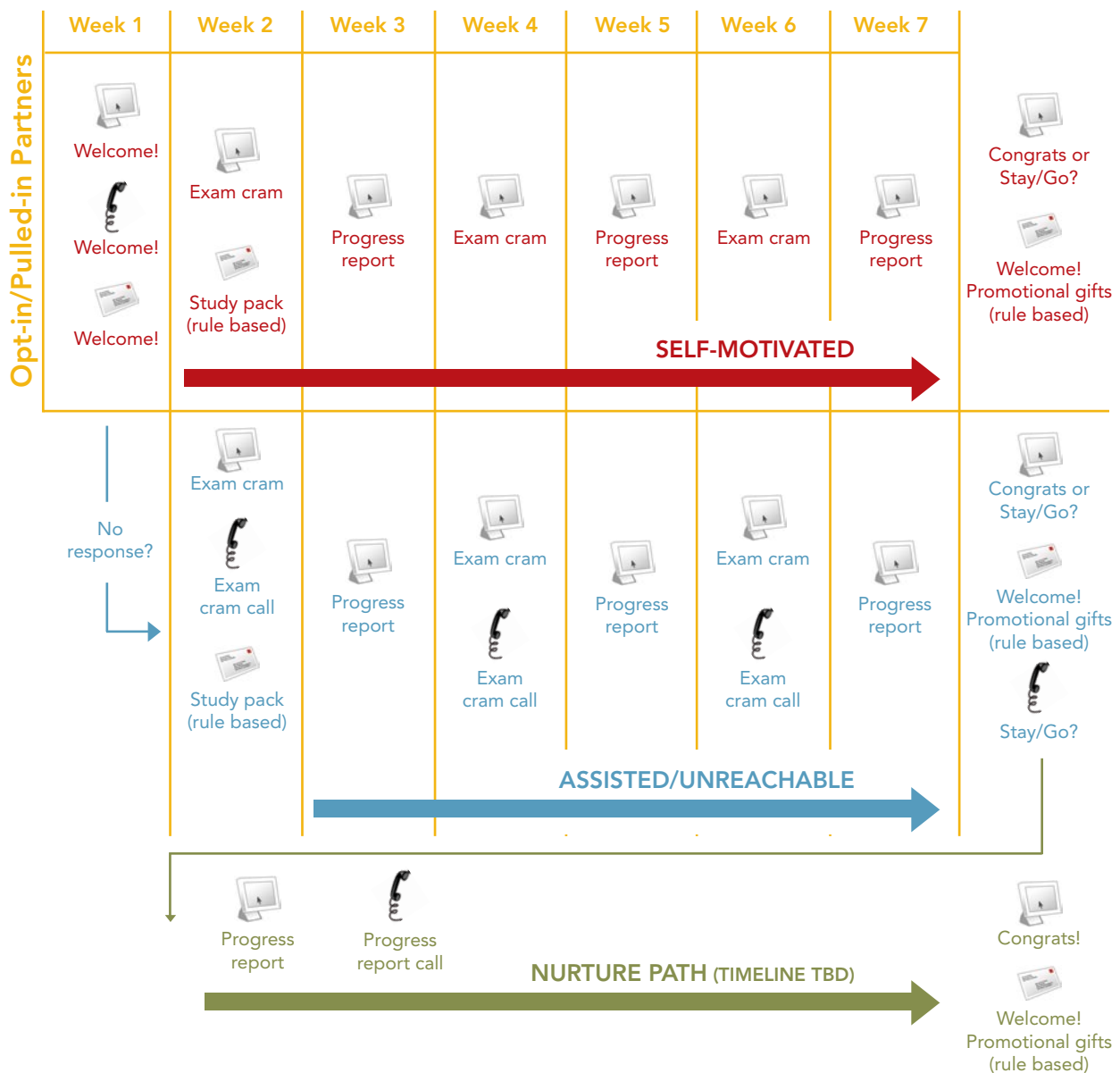
■ K/P SOLUTION

K/P worked closely with the client to develop a recruitment process for the small business community that would be more formalized and guided. The end result of this collaboration was a seven-week communication strategy to enroll partners in the small business program. For additional support, K/P partnered with an outside resource to handle telesales functions.

In the fall of 2007, an e-mail was sent to partner channel members, encouraging them to become part of the small business community by the start of 2008. A link in the e-mail took partners directly to an opt-in page hosted by K/P. The formal recruitment process began as soon as a partner chose to opt in. They were asked to provide contact information and their partner ID on the enrollment site, and were told to expect a follow-up phone call from a small business program coach. A toll-free number also was provided for those who wanted to speak to someone immediately about the program.

After opting in, the partner was “touched” each week with other targeted communication – personalized e-mail and direct mail elements developed and distributed by K/P, and telesales support provided by their third-party partner. The seven-week effort and its components are outlined in Figure 1:

Three contact paths, multiple touches:



To ensure streamlined integration, the project required several points of “data handshaking” between the third-party telesales provider and K/P systems. The communication strategy applied various business requirements using a “waterfall” approach, which identified at what stage a partner was during the enrollment/training process. Partner details essential for determining the appropriate timing and nature of each touch point were tracked, such as date of solicitation and source of record.

Privacy

Throughout the enrollment and training period, participating partners were asked if they wished to opt out of the process. An opt-out link was provided at the end of each e-mail, along with a URL that led to the client’s privacy statement. Having a straightforward opt-out process was important to the company’s privacy board, which quickly approved the contact strategy developed by K/P.

K/P’s telesales partner managed all SBSC partner contact, including the case management portal. After initial enrollment, partners who had questions about the training were encouraged to call the toll-free number to reach a small business program coach, or to click an “e-mail us” link which took them to a web portal, where they could submit their contact information and question or comment.

Incentives

Starting with the first e-mail of the campaign, participating partners were provided with incentives – such as small promotional items branded with the program’s logo and sent via direct mail – to engage in the process and complete their training in a relatively short time frame.

To address the problem of partners not completing their full course of training, e-mail and direct mail correspondence designed by K/P clearly outlined the steps necessary for reaching each milestone in the process. The reason many partners stalled at the technical exam was because it was the most complicated step, and involved preparation and an off-line examination. To guide partners through this essential but challenging part of the process, K/P sent a resource CD to participants, and provided details in e-mail and direct mail correspondence for exactly how to sign up for and where they could take the exam. Members also were invited to participate in group study sessions prior to the test.

Engagement program

In addition to improving the recruiting process, the software company wanted to keep members engaged in the small business community once they achieved their competency, and be proactive about growing their skills. K/P worked with the company to develop an engagement program featuring incentive offers and a grand prize contest. One primary goal of the effort: having small business community members share their deployment success stories with the company.

In January 2008, members were contacted by personalized direct mail. They received a package – featuring recyclable materials – that included details about the promotion along with a View Master, branded with the community logo and showcasing images related to the contest’s grand prize. The mailer clearly outlined the steps for entering the contest and included a URL for registration.

There were three steps to entering the contest for the grand prize. First, participants had to accept the contest’s terms and conditions and complete an online survey. Then, they had to accomplish one of three tasks during the entry period. A select number of participants were rewarded with small prizes for completing one of these three tasks, which included establishing a new account with an authorized distributor, participating in a product demo, or completing an online registration form for certification training. The company encourages small business community members to attain additional certifications that enhance their current competency and put them on the path toward achieving other designations in the main partner program.

The final step to contest entry was to submit a deployment success story via an online submission form. Two additional personalized direct mail pieces with contest details were sent to small business community members in February and March; each promotional mailer, including the January hang tag mailer, featured information about an authorized distributor along with that company’s logo.

■ RESULTS

- By March 2008, just over six months from the start of the recruitment program, membership in the software company's small business community had increased by 27 percent. The company also was well on track toward meeting its recruitment objectives for the fiscal year; it needed to increase membership by just 7 percent by June 30, 2008, to achieve its goal.
- The small business program communication strategy was supported internally by many different business groups within the software company, which recognized that recruitment of more partners with small business designations would benefit their own objectives and drive revenue for the entire company. As a result, the campaign essentially has been self-funded from the start, with different units contributing a portion of their marketing budget toward its support.
- The client has received positive feedback from partner channel members for applying "green thinking" to the direct mail portion of the engagement program related to its small business recruitment campaign. Components were made of recyclable and Forest Stewardship Council (FSC) – certified materials.

■ SUMMARY

By working with K/P Corporation to create a multi-channel, multi-touch communication strategy that would keep its partners engaged throughout the process of earning their small business competency designation, the software company has significantly enhanced enrollment in its small business program.

In the long-term, increasing the number of partners with small business competency within the greater partner channel likely will enhance the software company's revenues – especially, those of its partners and individual business units. Recognizing the value of enhancing membership in this important competency area, many different business units within the organization provided financial support for the campaign.