

CUSTOMER SUCCESS STORY: THOMSON WEST

World-Class Practices Drive Response Marketing at Thomson West

Thomson West, the foremost provider of integrated information solutions to the American legal market, has embarked on a far-reaching initiative to strengthen customer relationships and value. These wider goals are reflected in the actions and accomplishments of the company's Response Marketing Group. This direct-to-customer marketing team has introduced an array of world-class marketing practices, demonstrating the impact and opportunity associated with shifting to a customer-focused strategy.

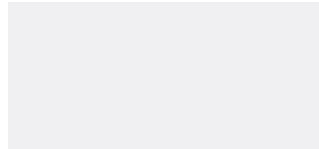
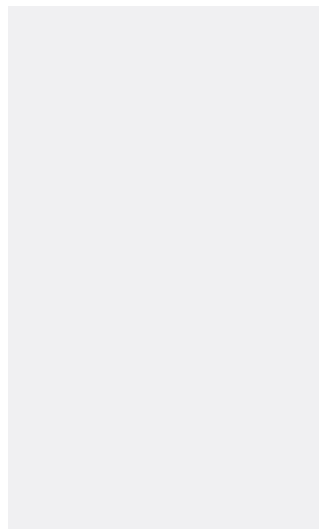
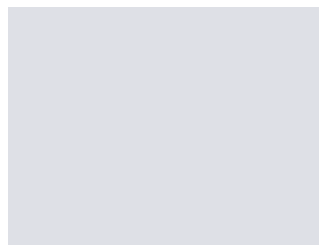
Response Marketing, which provides direct marketing services within Thomson West's strategic marketing organization, began its own transformation as part of the company's recent Customer Relationship Management initiative.

"We saw this as a powerful opportunity to rethink our organization and we seized it," says Jane VanTassel, leader of the Response Marketing Group at Thomson West. "The results of our marketing effectiveness efforts have been tremendous. We have reestablished and repositioned ourselves as a driving force for customer value."

Thomson West realized that its success in shifting from a product-focused structure to a segment- and customer-focused structure would hinge on the implementation of new, supporting technology. However, experience with CRM initiatives in recent years has demonstrated the importance of thinking beyond the technology itself to embrace organizational and process change in tandem. So, as the implementation of new sales force automation and marketing automation systems proceeded, Response Marketing was engaged in its own parallel efforts.

"Doing more of the wrong things faster was not the goal," explains Tom Jared, who led Customer Management and championed the Marketing Effectiveness initiative. "We need to know our customers in the way they want us to know them. Our investments in advanced marketing capabilities and skill-sets represent a vital step in that direction."

Working with Quaero Corp., a recognized strategy consulting firm that specializes in marketing effectiveness, Response Marketing was able to build a new foundation of plans, practices, processes, methods and skills that will soon bring the group to a world-class level. Indeed, the group has embraced a disciplined and dynamic approach to marketing – one that ensures that core capabilities are continuously developed, key processes are monitored and refined, and business outcomes are actively measured and managed.



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And, while Response Marketing has been largely dedicated to supporting the sale of specific product sets in the past, the new capabilities position the group to support sales across products, practices and channels throughout the company. The group's key strength lies in its direct interactions with customers – generating 50% of Thomson West's direct-to-customer marketing campaigns – and its expertise in sales support. Such positioning will enable the group to measure marketing campaigns as well as the quality and impact of sales leads.

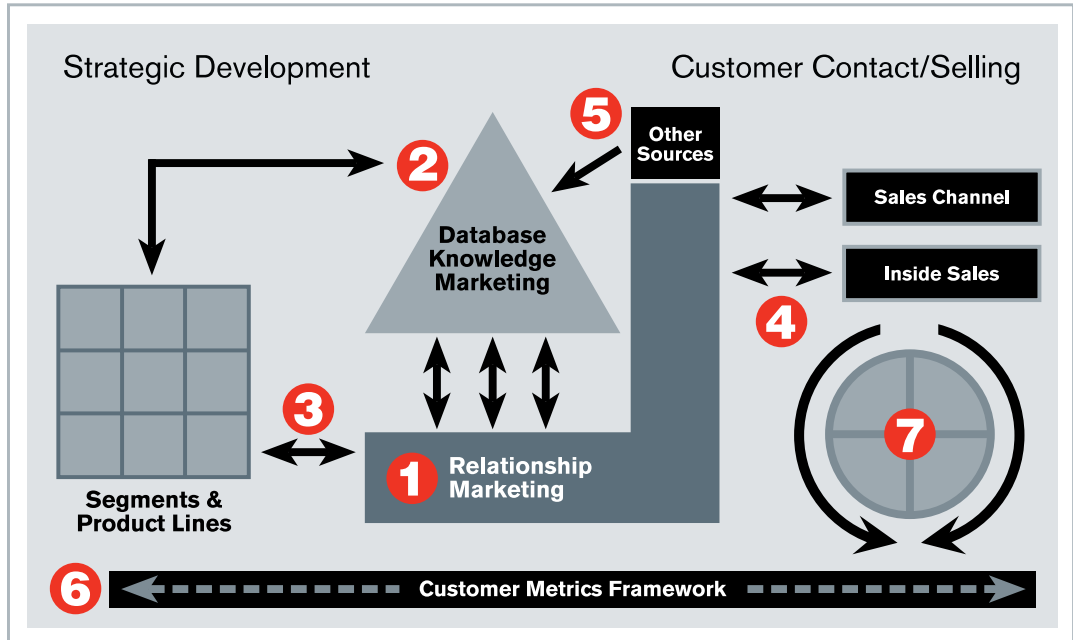
“Response Marketing is in the vanguard of Thomson West's efforts to create more powerful and valuable relationships with its customers,” says Ken Demma, managing director of Quaero's marketing effectiveness practice. “They directly touch customers and the expertise they have built represents important value for all sales channels. The group is now positioned to have a critical impact across the business in the coming years.”

The group achieved these objectives by investing in a comprehensive and coordinated array of activities including a Marketing Effectiveness Blueprint, a Knowledge Agenda, an Organizational Transformation program, a Best Practices Assessment & Roadmap, and Marketing Automation Systems. Through its far-sighted investments in world-class marketing, Response Marketing is now poised to play an extremely valuable role in Thomson West in the coming years.

The Marketing Effectiveness Blueprint

The Response Marketing Group's transformation began with a Marketing Effectiveness Blueprint. The blueprint, which was developed in association with Quaero, recognized the tactical actions, supporting processes and organizational capabilities necessary for the group to deliver new levels of value to the enterprise and fully capitalize on the enabling technology that was being implemented.

In its integrated, best practices-based plan, Quaero identified the key activities required to reach the group's customer-centric objectives, complete with process and organizational considerations, and individual project milestones. The Marketing Effectiveness Blueprint (see graphic) addressed such key factors as relationship mapping, customer segmentation, sales support, data management practices and infrastructure, performance monitoring and measurement, and approaches to drive learning and improvement.



“The Marketing Effectiveness Blueprint provided a high-level perspective,” says VanTassel. “It enabled us to prioritize key challenges and opportunities so we could focus on them.”

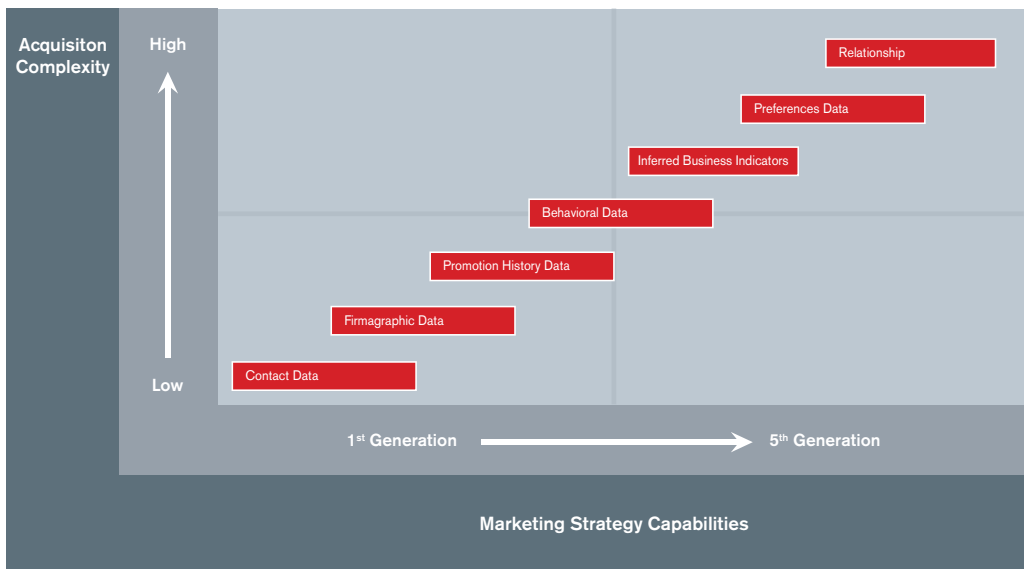
The Knowledge Agenda

One of the key outcomes to emerge from the blueprint was a consensus that the quality and integrity of customer data would be critical to the success of Thomson West in the coming years. This “Knowledge Agenda” sought to address problems associated with inconsistent, inaccurate and incomplete data about customers. Quaero’s role revolved around identifying key information necessary to understand the customer (see graphic).

Additionally, Quaero performed a multi-dimensional data quality assessment for the project and provided recommendations on resolving data quality issues. This was enriched with insights into the best practices of world-class organizations.

Participants in the company’s strategic marketing and sales organizations recognized that it would be important to develop a uniform understanding of the customer, what information was important to capture, and ways to ensure data quality.





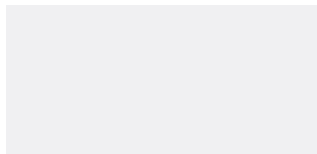
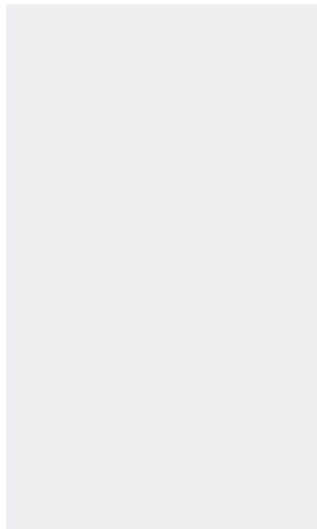
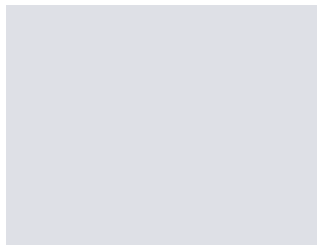
With that in mind, it was agreed that the company should form a data stewardship committee with senior representatives from sales, marketing and customer service. Under the leadership of Keith Ricke, Thomson West's senior director of Marketing Intelligence, this steering committee has begun to address these challenges in an ongoing, company-wide fashion. The members of the committee are now focused on developing a comprehensive, consistent, multi-dimensional view of the customer. Additionally, they are putting in place data quality initiatives that will enable them to supply accurate data in support of the customer profile.

Focus was critical to success. "Having more data was not the objective," says Ken Demma. "It's about having the right data – the optimal customer view – and having it in a form that it can be used for business benefit. Our goal was getting focused on the critical components of the customer view and ensuring the right data is identified, acquired and actively used."

Thomson West's strategic marketing organization stands to realize particular value through this rigorous new focus on the underlying customer data. "The next level of marketing productivity will be driven by intelligence," says Chip Cater, senior vice president of marketing at Thomson West. "Deeper and richer information about campaigns, segments and customers represents greater precision in marketing. Such information will help us create greater value in the eyes of the customer and throughout Thomson West."



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Organizational Transformation

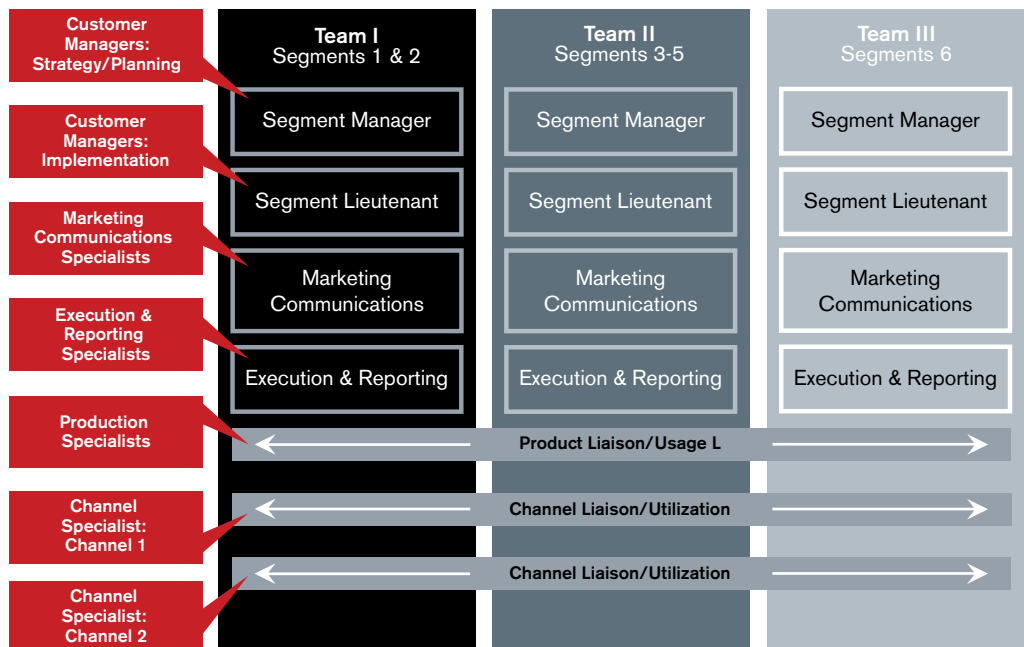
While the CRM technology and data quality initiatives provide a critical foundation for customer-centric business, the Response Marketing Group also knew it must transform its organization in order to realize its full potential as a world-class service provider. At the outset, the group's challenge was that it was unprepared for the change in activities, skills and tools required to achieve the customer-centric vision.

Response Marketing had traditionally been a product-focused marketing organization. Its heritage was in print product sales via direct channels. As a result, the group foresaw limited revenue growth opportunity from its existing customer base.

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In order to lay the foundation for creating wider value within Thomson West, the group committed to an organizational transformation effort. Success would lie in linking organizational strengths and competencies to customer segments in a highly leveraged and effective way (see graphic). The key hurdle would lie in transforming Response Marketing from being product-centric to customer-centric with minimal disruption to day-to-day marketing operations during the initiative.

"We need to do things 'right' from the customer perspective," explains Jared. "To meet this objective, we knew that Response Marketing must be strong in orchestration and execution, coordination and process. We knew we would have to redesign the organization in order to develop best practice capabilities and realize our goals."



Rising to the challenge, Quaero worked with the group to develop a future-state marketing organization – aligning the Thomson West vision of customer-centricity with a new marketing structure and the roles and skills necessary to deliver on that vision. Through the new structure, the group’s marketers have assumed new levels of specialization while being encouraged to actively collaborate and cross-train. Quaero also provided a framework and suggested approach for development and deployment of the new organization, thereby maximizing the speed of the group’s transformation process with minimized disruption.

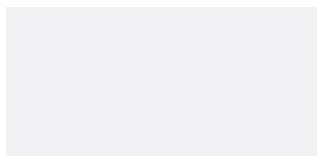
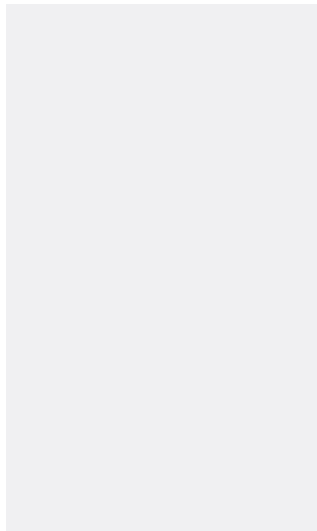
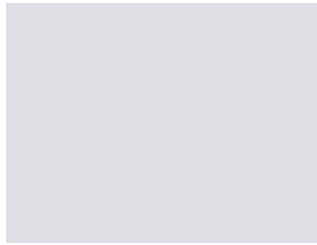
The transformation of Response Marketing now positions the group for wider impact and influence within Thomson West. As VanTassel explains, “We understand how to communicate with customers directly, how to leverage different channels, how to read the results, how to make a very compelling message and bring those key benefits to life. It no longer matters if we are selling books or online solutions. What we are selling is the answer to a need.”

Best Practices Assessment & Roadmap

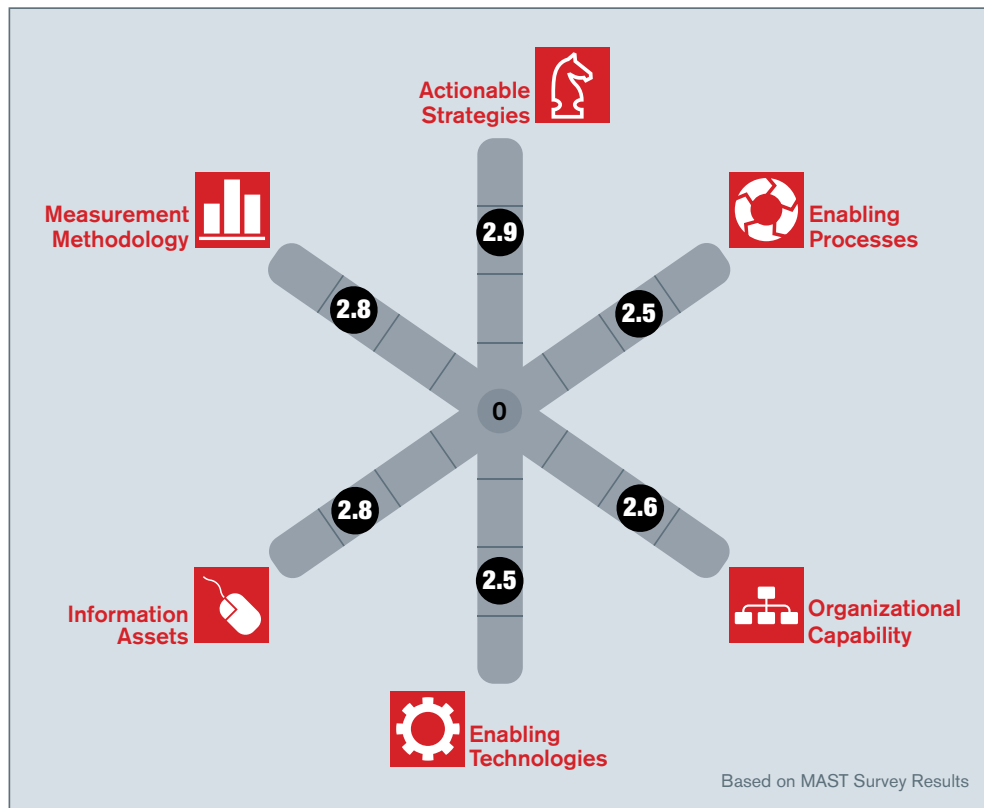
Central to the overall objective of becoming a world-class marketing organization was Response Marketing’s commitment to embrace, internalize and operationalize industry best practices. That effort began with a best practices assessment. Quaero’s Marketing Effectiveness Assessment, which is based on both qualitative analysis and employment of its quantitative Marketing Assessment Survey Tool (MAST), helped the group identify the key dimensions of marketing competency that would be critical to outstanding performance.

The Marketing Effectiveness Assessment offered an objective, dispassionate analysis of strengths and weaknesses, key points of leverage and areas in need of improvement. Going forward, the MAST framework and tool provide a disciplined way of measuring the group’s capabilities along key performance dimensions as well as benchmarking its progress in relation to industry best practices. Such foundational elements also make it possible to identify next steps for enhancing the performance of the marketing group. Having identified key areas of planned investment, Response Marketing has pointed to process and measurement as two dimensions that will be particularly vital to its efforts to build and sustain world-class competencies.





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“We have identified both evolutionary and revolutionary best practices that we intend to apply in Response Marketing,” says VanTassel. “They are pretty well mapped out for us. Now, it’s a matter of operationalizing our plans. Now, it’s a matter of making it happen.”

Marketing Automation Technology Implementation

In parallel to the Response Marketing Group’s marketing effectiveness work, Thomson West also was engaged in a CRM technology implementation involving Unica’s Affinium campaign management system and Siebel’s sales force automation system. While the Siebel deployment was primarily designed to support inside sales and account management groups, the Unica deployment was designed to support Thomson West’s entire strategic marketing organization.

Quaero worked with Thomson West’s most senior marketing and CRM executives to ensure the marketing automation implementation was a success. The objective

of the deployment was to ensure marketing campaigns and communications could be effectively executed across multiple touch points – email, web, direct mail, call center, and sales force. Furthermore, it was vital to provide a consistent and more complete view of the customer across the organization.

Existing marketing applications were based on legacy mainframe infrastructure – leading to poor integration with internal systems and inadequate marketing performance reporting. However, the new solution provided a best-in-class campaign management solution integrated with other customer-facing systems, ensuring that marketers gained access to richer information about customer response, behavior and priorities.

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Quaero was involved in defining, designing, and delivering a solution that integrates Unica’s Affinium Campaign with in-house Marketing Planning, Siebel SFA, SAP, and various E-Commerce systems. Quaero also extended Thomson West’s data warehouse to deliver a complete view of customer data for richer customer segmentation and marketing analytics.

From Contact Optimization to Customer-Centricity

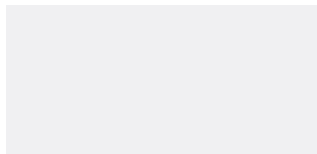
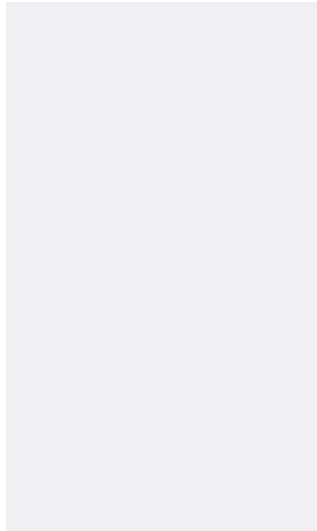
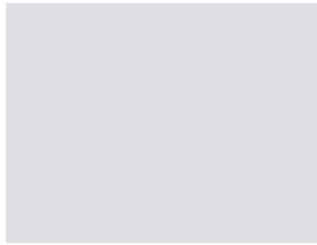
Such endeavors have helped set the stage for Thomson West’s wider shift toward customer segmentation and customer-centricity. The company has laid the technological foundations for dynamic and personalized customer management, while ensuring that customer data is effectively captured, maintained and applied.

At the same time, the company’s CRM initiative has provided a powerful opportunity for the Response Marketing Group to begin demonstrating the value of the initiative in clear and present terms. Indeed, the group is now intent on introducing a “contact optimization” capability – one that will enable the group to maximize customer profitability by engaging customers in a more precise, relevant and cost-effective way.

Under this approach, Response Marketing is able to leverage customer analysis to determine the optimum number of customer contacts, interactions and offers necessary to drive enduring revenue growth. “What we need to do is integrate the marketing we are doing directly with customers,” says VanTassel. “When we have a centralized center of expertise, we are much more able to do that integration.”



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Efforts such as these potentially have deep and important implications for Thomson West as a whole. “That is the thinking – moving toward a more integrated marketing approach,” she concludes. “We as a company have the opportunity to engage our customers in a very powerful and profitable new way. That’s where we are headed.”

Working with Quaero, the Response Marketing Group has realized its first transformational objectives. It has changed mind sets, strategies and organizational capabilities – putting customer growth and profitability at the center of its endeavors. It has repositioned itself as a world-class service provider within Thomson West. And, it has laid the foundations for far-reaching success and world-class leadership in the realm of customer-focused marketing.

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About Quaero

Quaero, a CSG solution, uses customer intelligence to help clients shift from traditional campaign-driven marketing to real-time, multichannel customer interaction. Quaero experts blend strategy and analytics with performance management and technology to establish dialogues that improve the customer experience while increasing overall customer value.

Headquartered in Charlotte, NC, the Quaero solutions group provides marketing services to category-leading clients within the Financial Services, Pharmaceutical/Healthcare, Travel and Leisure, Media, Consumer and High Tech industries. For more information, call 1-877-570-2199 or visit www.quaero.csgsystems.com.