



# Customer Relationship Management/ Medical Equipment Firm

Case Study



This medical equipment company had recently spun off from its parent, but was dismayed to see the unexpected erosion of its customer base. The company approached cube 2.14 for help in diagnosing the cause and developing a solution.

## Our Process



## Assess the Needs

We identified the client's own employees as a root cause of the decline in sales. Their sales staff had been working as mere order takers – instead of more proactive customer relationship managers – for years. In fact, even the supervisors were former order-takers themselves who had been promoted based on seniority rather than management skills. To turn sales around, the client needed to quickly implement a program to teach the entire sales department the skills needed for effective customer relationship management.

## Diagnose the Situation

We started by talking with the sales staff and supervisors about the systems they currently had in place. With this information, we recognized that we needed to address three key factors: training the ordertakers to adopt a more comprehensive customer care approach, training the supervisors on both the importance of customer relationship management and maintaining a cohesive, consistent marketing message, and providing a more rewarding relationship for the customers.



## Design the Solution

We developed a three-fold strategy: designate a dedicated customer relationship manager to a group of clients (by geography, product line, etc.); develop new training for customer relationship managers and their supervisors; create a new online experience for customers. And we took great care to communicate the progress of the plan to all parties involved before, during, and after the implementation.

## Plan the Program

### *Customer Relationship Management*

For the new customer relationship managers, we assessed each individual on the skills each position required, offering permanent positions to those who passed our test, or the choice of re-training or a severance package to those who didn't. Those who stayed then began a six-week face-to-face training program that included plenty of printed job aides and cheat sheets. We also sought to build confidence by looking for opportunities to commend people; for example, on the client's website we asked customers to tell us, "What have we done well for you today?"

### *Supervisor Training*

Supervisors received more in-depth training, both about how to be an effective manager and about the business of the client. Supervisors were expected to participate in weekly training, a weekly conference call to outline the week's sales strategy, and weekly phone calls to check up on customers.

### *Customer Engagement*

We worked hard to make customers feel valued and important. We introduced customers to their relationship manager, so they knew whom to contact if they needed help, and we created new aspects of the client's website to give customers full access to their accounts and an enhanced experience with our client. We also developed a survey for customers to take at regular intervals asking not only how well our client was doing, but also whether they were recommending our client to others and, if not, what else we could do for them.

## Implement the New System

Because we developed a system that was proactive in catching potential problems before they snowballed, we virtually eliminated customer complaints. And despite decreasing overall headcount, the new customer relationship managers were so successful that sales actually increased.

Chalk up one more happy client.