

Creating Customers for Life.™



“The implementation of our contact management system has made the whole operation more effective. It has paid for itself ten times over. It takes one tenth of the time to carry out marketing analysis and get mail campaigns out the door. We are now able to prepare a telemarketing campaign to a target audience within two hours. It makes everything a lot quicker and easier and enables us to respond rapidly. It has also helped us to allocate resources much more efficiently, thank-you ASAP Goldmine Consultancy.”

-Commercial Communications Manager, Chris Harrop

Company Profile: Shell Oils is the industrial lubricants division of Shell UK providing lubricants and lubrication solutions to the manufacturing industry.

Business Need and GoldMine Solution: The Marketing Department of Shell Oils comprises a telemarketing unit, a team of market sector managers and a communications team. Their activities consist of a mix of market and product development, relationship marketing programs, database management, direct mail, advertising, exhibitions and telemarketing, as well as lead management. All the campaigns they undertake are business to business, with one of the most recent being the high profile and highly successful “heroes and villains” campaign.

Before taking on a sales and marketing system, all marketing activities had been administered and coordinated via an in-house mainframe system. So, for example, if a market sector manager wanted to run a mail campaign or a market analysis report, a request would have to be made to the MI (Management Information) department who would run it off for them. In addition to being reliant on other departments, it was becoming increasingly clear that their in-house systems were not designed to meet the demands of a sophisticated marketing operation. What was needed was a dedicated sales and marketing system which they could use to manage the entire marketing and sales process from prospecting through to follow-up, response monitoring, lead tracking, customer services management and relationship marketing.

In January 1996, a new Commercial Communications Manager, Chris Harrop, was taken on to design, implement and manage the relationship marketing program for Shell Oils. Working in conjunction with the Marketing Manager, Tim Stafford, one of his first projects was to find an effective sales and marketing system. This would be key to the success of the program. One of the most important considerations, and an area lacking in their existing system, was the ability to handle incoming inquiries and requests for information in a knowledgeable and sophisticated manner. They also needed a system that would store a history of all notes and actions associated with each contact, and where the information would be easily retrievable for viewing and reporting.

In addition to an effective inquiry handling and lead tracking system, they also required a flexible and powerful marketing database, which would allow them to effect finely targeted mail campaigns and telemarketing follow-up programs. They also needed to be able to monitor the results of each campaign and extract marketing

Company:
Shell Oil

Industry:
Manufacturing

Contact:
Chris Harrop
Commercial
Communications Manager
Tim Stafford
Marketing Manager

Business Benefit:
“Our ASAP implemented contact management system has proved a real asset to our management of customer information, and improved our market analysis. For a business fundamentally differentiated by the relationship with the customer, it gives us a real competitive advantage.”

GOLDMINE
Software Corporation

analysis reports, as well as monitor the effectiveness of telemarketing campaigns and individual operators. In the future, they envisaged their entire sales team being fully equipped with laptops and accessing customer and prospect information from a central sales database. Explains Harrop: "It was important that the system we chose was not just a glorified direct marketing system, but a system that would provide us with real business benefits by arming our most important people - our sales team - with all the information they need."

Considerations in Choosing the Right System

Strategically there were four options open to Shell Oils. They could go with a custom made solution based on an in-house Microsoft™ Access system, an outsourced custom made system, an off-the-shelf ready-to-run package, or an off-the-shelf configurable package. The first two options they ruled out due to the time constraints they were under, and the ready-to-run package they felt would not provide them with the level of flexibility and configurability they required. They decided that the best solution would be to find an off-the-shelf package that they could get up and running quickly and with minimal disruption to their business, whilst at the same time being highly adaptable to their own individual requirements and with the power and flexibility to grow with their business.

They evaluated a number of contact managers and higher end salesforce automation systems before making the decision to go ahead with the GoldMine contact management software package. A number of factors influenced their final decision. They were looking for a system that satisfied their wide range of functional requirements, yet was easy to use and which they could easily tailor to their business needs. They also needed to be able to retrieve information quickly, and store detailed information and profiling for each contact.

Future expandability of the system was a key factor, especially given their entire sales operation would eventually be using it. The groupware functionality and remote synchronization facilities in their chosen system would enable all of their sales and marketing staff to share common information, whether working from the office or out on the road, and would empower them to work far more cohesively as a team. Also important to Shell Oils was to feel a sense of "ownership" of the software. According to Harrop: "The system is not only easy to use, but it doesn't require a lot of technical input to maintain and develop. In fact, we do most of it ourselves after our training from ASAP."

Getting up and running on their new system was quick and painless, and by the first week in May, the Shell Oils marketing team were all accessing it over their Novell network. They purchased the software from ASAP GoldMine Consultancy.

Initially Shell Oils purchased a 10 user network license and were advised to purchase some additional add-on products for reporting, synchroni-

zation and data import purposes. In addition, they also purchased Quick Address for rapid input of data.

Shell Oils then worked together with their suppliers to achieve a rapid implementation of their system. This started with one and a half days installation and configuration consultancy, which involved a consultant installing the software onto each machine and producing a Workflow Analysis of the Implementation. The Workflow Analysis, which was presented as a formal document to Shell, outlined time scales and milestones for the project and contained listings of all fields and screens that needed to be set up to satisfy Shell's requirements. Beforehand, in defining the information to be captured, great care was taken by the two project managers at Shell Oils to think of all possible uses of the system both immediate and future, with feedback and ideas being taken from all their marketing and sales staff. As the configuration process proved relatively straightforward, it was carried out internally by Harrop and was completed within one week.

With their live system up and running, the next task was to transfer all their customer and prospect information from their mainframe system onto the contact management system. This was achieved using an add-on utility and was rapidly completed within a day. The data import was followed by a two-day intensive training program. The course covered everyday activities such as data input, scheduling and completing calls and activities, retrieving information, using the calendar and printing documents. More advanced training has since been delivered to staff as and when they've needed it by ASAP.

The next step for Shell Oils will be to roll out the system to their entire salesforce. On the marketing side, they will continue to use the system to further refine their campaigns and carry out more sophisticated targeting and segmentation. On a wider scale, other divisions of Shell are also using the same technology to automate their sales and marketing activities, and due to the benefits readily seen from this type of automation, further expansion within Shell is planned for the future.

"Our contact management system has proved a real asset to our management of customer information, and improved our market analysis. For a business fundamentally differentiated by the relationship with the customer, it gives us a real competitive advantage," explains Tim Stafford, Marketing Manager.

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