

DIRECT MARKETING

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Hot, buttered rewards convert movie lovers to customers

SCENE card helps BNS keep acquisition popping, retention sticky



This \$30-million Scotiabank Theatre (formerly Paramount) is located downtown at the corner of Richmond and John in Toronto. Inset: Scotiabank's Brand & Marketing Programs VP Rick White, who helped mastermind the SCENE rewards program, poses with some movie paraphernalia.

ABY PAT ATKINSON
sk any young person to show you what's in his or her wallet these days and you'll likely discover a SCENE card—an indicator that its holder is a film buff and probably a popcorn eater to boot.

The card also symbolizes the happy union that began on April 30, 2007, when Scotiabank and Cineplex Entertainment joined forces to launch their SCENE program, the first Canadian entertainment rewards program to reward members for going to the movies and making purchases via their Scotiabank debit and VISA cards.

With more than 1.7 million members today, the SCENE card has become a phenomenon that resonates strongly with

the demographic the Bank set out to attract.

"One of the key aspects going into this program was looking at the cohort between 18 and 44 years of age. That's where as a bank, we have so much churn," explains Rick White, vice president of Brand and Marketing Management, Scotiabank. "Not only do we experience this, every bank does because that age group tends to have quite a number of life events: from getting out of school to the first job... to getting married... children... houses... and everything else. That's where we saw an opportunity. We asked ourselves, 'How do we impact that?'"

Many traditional loyalty programs focus on the more established, 45 plus demographic: a group that tends to be interested in wealth accumulation and

travel incentives. The challenge here was to identify something that would be tremendously appealing to the younger target the Bank was hoping to attract.

"One of the things that they [younger people] certainly told us they were after was something they could redeem immediately," White reveals. "They didn't want aspirational things. They wanted something that would impact them today."

Opening SCENE

A lot of serendipity came into play for Scotiabank to find its perfect partner. White says that Cineplex Entertainment had long been ruminating on the possibility of a loyalty program and had even met with other banks and loyalty card providers before contacting him about

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DIRECT MARKETING 



editor's letter

Pat Atkinson

The case of the purloined meaning: a cautionary tale

If you've been following the developments at The Royal Canadian Mint, then you are probably equally riveted on the unreconciled difference between its rolling inventory and the physical count of precious metals for the 2008 fiscal year.

Yes, admittedly it's a stretch across *DM's* already vast bailiwick to be following what seems more of a subject for speculation by *Coin World* or *CA Magazine* than us. But truth be told, the Mint is a BIG direct marketer and some of what went missing, if indeed anything *is* missing, may have been earmarked for sold-by-mail coins and other collectables. If so, then the Mint likely experienced some savings (or increases) in postage for 2008 (depending on what, if *any*, metal replaced the precious component of its products). Perhaps a team of forensic postal consultants could "audit" the Mint's 2008 weights and postal charges on particular categories of outbound parcels and compare them

to a baseline from the previous year to determine whether something, as they say, went "amiss." Of course, fluctuations in packaging (the addition of bubble wrap or foam peanuts) and postal rate increases or category changes that occurred for the period would have to be taken into account... hmmm... never mind.

A June 29th report from a review conducted at the Mint by Deloitte and Touche concluded that "the unaccounted for difference in gold does not appear to relate to an accounting error in the reconciliation process, an accounting error in the physical stock count schedules, or an accounting error in the recordkeeping of transactions during the year." In other words: *don't look at the accountants* and best of luck. Subsequently, the Mint "has notified its insurance carriers that it intends to file a claim under its "All Risks" insurance policy, which, if successful, will largely

offset the amount."

Before paying up, the insurance companies should contact a great detective. Were Sherlock Holmes here today, either he or Dr. Watson would prove to be an avid *numismatist*. With authorities scratching their heads over what could eventually turn out to be the *perfect crime*, the gifted sleuths would already be skulking around Winnipeg *in cognito*, posing as tea mistresses and custodians: sweeping the Mint's floors, subtly interrogating the staff while keeping a careful hand on their wigs, and conducting intricate experiments at night involving crucibles, electrodes, and acid. After several sleepless nights spent sucking on his calabash pipe, scratching cat screams on his violin, and ruminating on this predicament (if indeed there *is* a predicament) Holmes would suddenly sit bolt upright in his wing chair and cry out "Eureka!" With

that, Watson, roused from his bed, would stagger into the parlour to apprehend the essence of the situation: With so many record keeping and measurement processes in place to comply with the need for transparency and public audit, the Mint's routines became, well, *routine* — meaningless bureaucratic exercises that obscured the ability to understand anything of significance. Did the precious metals seep out with meaningless data? Perhaps. "But that, Watson, is a question for the angels."

On a personal note, my contract with Lloydmedia ends with this edition of *Direct Marketing*. To contributors, advertisers, experts and thought leaders, and especially to you, our readers, getting to know you has made this year a delightful and intellectually stimulating experience. Thank you for your support and please keep it coming as the publication continues its evolution.

Canada's e-coupon conundrum comes to a head

Will consumer demand overcome retailer reticence and make print-at-home coupon use a reality? By Pat Atkinson

Timing, as they say, is everything. And with Canadians still concerned about the economic recession and potential job losses, the launch this fall of Couponclick.ca — an online portal with hundreds of product and service coupons that bargain hunters can download and print at home on their personal printers — will certainly be *apropos*.

The new site also promises marketers a direct link to customers and the ability to gather rich, aggregated information about coupon users. This bodes well for enhanced Customer Relationship Management efforts and the creation of customized promotions.

According to New York-based (Experian) Simmons Market Research Bureau, more than 40 million Americans currently print online coupons. In June, Coupons.com, the global leader in interactive coupon solutions, announced that in just over five months this year, the savings printed on its digital coupon network surpassed the \$313 million in value printed in all of 2008. During this period, the value of savings printed increased 212 percent compared to the same period last year. So what's going on here?

Pent up demand

With nearly three-quarters of us accessing the Internet, Canadians are hungry for coupons in general and online ones in particular. Seven out of ten Canadians who participated in a May 2008 ICOM study said that they planned to use coupons more often to purchase their favourite goods and services. A recent study by marketing research firm comScore showed that 2.6 million unique visitors in Canada visited online coupon Web sites last December — this was up 60 per cent from 1.6 million in December 2007. That same study found that coupon sites were the fastest growing Web category used by Canadians over the past year.

This is no surprise to Marc Morin, president of Strategy Marketing Direct (SMD), an established CRM consulting firm located in Montreal. He's researched e-couponing extensively on behalf of clients and is persuaded that the writing is on the wall for the traditional printed version.

"Consumer demand for e-coupons is just too great to ignore," he explains. "People want to be able to take advantage of offers while they do their online searches. Plus, there is the convenience

factor of not having to collect paper coupons by going through piles of circulars, flyers, newspapers and so on."

An article by Brian Jackson "Canadians want printable coupons, grocers deny them," which appeared on itbusiness.ca on September 17, 2008, reported that a number of Canadian grocers refuse to honour e-coupons out of concern that they may be fraudulent. Blogs on the Web suggest that Sobeys and Metro are in this category.

"There is always the possibility that some consumers will make a bunch of photocopies [of print-at-home coupons] and hand them out," Morin acknowledges. "But the net result is that the manufacturer is ultimately going to sell more product — albeit at a discount — which is still a good thing."

Who's minding the store?

Perhaps so but industry insiders report that what is more disconcerting to manufacturers is possible mis-redemption and coupon alteration by *merchants*, since such practices could lead to significant financial loss — particularly from coupons offering free merchandise. The challenge is that even if quality control and security measures

highlight and identify phony coupons during the clearing process, these fraudulent versions have already been presented and redeemed at the point of sale. Consequently, retailers worried about being reimbursed by manufacturers for print-at-home coupons, simply refuse to accept them.

More problematic still is the cashier's inability to validate print-at-home coupons, which cannot be scanned. "Again, that creates a level of insecurity for the retailer, who may worry that the manufacturer will not honour these coupons after the fact," explains Morin. He adds that one of the first things the industry in Canada needs to do is agree on a standard.

Christian Dion, senior director of Business Development at Couponclick.ca, agrees. "There has been a lot of misconception around Internet coupons. Not all of them are created equal."

From his perspective, a lack of leadership and education is responsible for Canadian retailers not knowing how to separate the wheat from the chaff. As it turns out, American retailers are not scanning print-at-home coupons at the point of sale either, yet consumers are presenting them in record numbers to

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Hot, buttered ... from COVER

the naming rights opportunity for five Paramount Theatres across the country. At the time, he wasn't particularly interested in that option. Nevertheless, he agreed to meet with the entertainment company's representatives to discuss potential tie-ins that might make naming movie theatres after Scotiabank a more relevant marketing opportunity. The two companies soon

interesting fit there," admits the seasoned marketer. "And although we went out and validated it through research with various age groups, intuitively, we felt that this partnership seemed to have a lot of resonance."

White credits the Scotiabank executive with cementing the limited partnership with Cineplex Entertainment—an

of the two partners can access only that information which rightfully belongs to it. For example, Scotiabank has no idea what movie a particular SCENE member watches or whether that person purchased products from the concession stand. Likewise, Cineplex Entertainment has no idea which SCENE members are Scotiabank customers. What both organizations share is data regarding the frequency of members' visits, some key member demographics, and e-mail access to SCENE members.

How the program works

Membership is free and no purchase is necessary. To qualify, prospects must have a valid Canadian address, a valid e-mail address, and be 14 years of age or older. Applicants can sign up in person at any Scotiabank branch or online by visiting www.scene.ca. Either way, applicants will be presented with three varieties of SCENE card.

The black card is the most basic option. It enables movie watchers who purchase their ticket at participating Cineplex Odeon Cinemas, Galaxy Cinemas, Famous Players, Silver City, Coliseum, Colossus, and Scotiabank Theatres (formerly Paramount Theatres) or book their ticket at Cineplex.com, to automatically earn 100 SCENE points every time they see a movie. Ten visits or 1,000 SCENE points earns members a free movie or concession combo.

By signing up for a red Scotiabank

SCENE debit card, members earn one SCENE point for every five dollars they spend at all merchants. By applying for this card, members automatically earn up to 2,000 points — which is equivalent to two, free movies.

Those who apply for a white Scotiabank SCENE VISA card earn one SCENE point for every dollar they spend at all merchants and automatically receive 2,000 points — which is equivalent to two, free movies.

Both the SCENE debit card and SCENE VISA card enable members to earn points leading to free movies more quickly. This has proven to be a powerful incentive.

Rewards for everyone

"We are very pleasantly surprised at how well the program is working," the entrepreneurial VP admits with a touch of pride. "We'll hit two million members this year. The momentum still continues—the rewards plan is adding 40,000 to 50,000 new members every month—so that is quite spectacular. As far as new customers are concerned, we started with very ambitious targets and have certainly surpassed them."

White says that to date, well over 200,000 brand new Scotiabank customers have been "driven in" by SCENE programs. Moreover, 90 percent or more of these people actually reported that they had migrated to the Bank *because of* SCENE.

He reports that beyond acquisitions, there has also been good penetration of the program within the existing

customer base and the number of VISA card members. Approximately one-third of SCENE members are also Scotiabank customers. "The retention of our Scotiabank customers who carry a SCENE debit card is significantly higher than those who don't," he explains.

If it ain't broke

White says that one of the beauties of the plan is that it is refreshingly uncomplicated.

"We assumed that to get to the two million member threshold, we would need a number of other partners to be there and as it turns out, we don't. While we would love to enrich the actual offering, on the other side of it, there doesn't appear to be a need for this right now."

Nevertheless, this strategic marketer, who once helped launch Mary Kay Cosmetics in Canada, is executing a number of new partnerships albeit slowly.

"We are starting to build the offering out but what we are being true to is that whatever we do must be related to entertainment," White explains. "There is no real pressure on us right now because the program is performing very well." This may be the understatement of the year. Cineplex is performing better than any other movie distributor in North America and its concession stand sales are very high, despite giving a ten percent discount away to its SCENE members. "Essentially, the SCENE program is a win-win for everybody," White summarizes. **DM**

*We'll hit two million members this year. The momentum still continues—the rewards plan is adding 40,000 to 50,000 new members every month—so that is quite spectacular. As far as new customers are concerned, we started with very ambitious targets and have certainly surpassed them. **Rick White***

began evaluating the business models they each had with an eye toward working together.

He recalls, "They [Cineplex] had no idea who was sitting in their theatres every afternoon and evening. There was no database at all. That was an opportunity for us [Scotiabank] to say, 'We can really provide that kind of strength to you [building a database]. We understand what it takes to do that.'"

In exchange for this assistance, Cineplex was able to provide the Bank with access to a large segment of younger Canadians—one that loves movies and attends them regularly. "We saw a really

arrangement which, no doubt, "broke new ground" within even the most progressive 21st century banking circles. Although at first blush, the concept of working with an entertainment company was met with some skepticism, once the idea was fully fleshed out and communicated, things changed. "Right up to our CEO, the executive was very supportive of the idea," White acknowledges.

The banking industry in this country is tightly regulated and strict legislation is also in place to protect the privacy of all Canadians. In compliance with these conditions, SCENE members' information is meticulously managed so that each

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Canada's e-coupon... from page 3

cashiers and receiving discounts. Dion explains:

"In the US, manufacturers and e-coupon companies worked with the Association of Coupon Professionals (ACP) to teach retailers the differences between the various types of electronic coupon offerings and explain how to make sure at the cashier level that legitimate ones can be identified. Together, these stakeholders implemented standards that are not really being enforced here in Canada."

With a membership of 59 companies—including a growing list of Canadian firms—the Drexel Hill PA-based ACP was formed to ensure coupons remain a viable sales and marketing tool and help resolve common industry concerns about coupon development, distribution and redemption. Executive director John Morgan says that he has been receiving "an increasing number of calls from Canadian firms seeking advice on e-couponing best practices and information about ACP." Morgan views this positively and the Association has already established a Canadian Task Force to attract initiatives within the retail and manufacturing sectors.

An ACP member itself, Québec's PromoPoste Services based its Couponclick.ca e-coupon offering on the only version of online coupon that meets the ACP's strict security and fraud protection standards, with all its site security features submitted to and

enforced by a coupon clearing house market.

Dion explains that these *Print-Controlled Internet Coupons* are produced by a system that controls the coupon's security, distribution, access, printing, and tracking. Although this type of coupon is not controlled at the cashier level, all pertinent information pertaining to each unique consumer is entered into the Web site's database as the coupon passes through the clearing system. And since consumers select and print coupons that are relevant and appealing to them, redemptions and purchases are more likely to occur.

"In the online world, redemption of Print-Controlled Internet Coupons ranges between 15 and 25 percent on average," Dion reveals, "compared with that from the typical Sunday newspaper coupon, which is less than one percent because it's like shooting in the dark."

Discounting the risk

Other Canadian online coupon Web sites approach this challenge differently. Some are portals that link consumers to retailers or manufacturers' Web sites. Others coupon sites ask users to register for paper coupons that are mailed out later. Dion says that instead of getting to the bottom of the problem—starting with understanding why there is misconception regarding e-coupons—these models avoid it completely.

"We need to be the *innovator* in the industry," he stresses. "We need to be the



Above, a prototype of a health and beauty page from couponclick.ca, a Canadian print at home coupon destination that is expected to go live this fall. Québec's PromoPosteServices, the Web site's owner, reports that every coupon will contain both a coupon and consumer code to enable 1:1 customer tracking. This is expected to discourage fraud attempts common with in-store and other types of coupons and reveal customers' buying patterns and product preferences. The Site's media partner is Canoe.ca.

one that, in some ways, will go to war to make this happen. When consumers are ready for something, they want to act on it now; they don't want to wait five to seven business days. Waiting does not work in a direct marketing model where

we are increasingly giving consumers what they want right away. Why would we slow it all down?"

In all likelihood, Canadian consumers will answer that question for retailers and manufacturers in the very near future. **DM**

The downloadable, December 2008 report from the ACP Digital Coupon Task Force: "Digital Coupon Guidelines" is available to members. Please visit www.couponpros.org for more information.

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Flying into the storm

How Travel Guard implemented a multi-channel sales strategy in this challenged economy *By Pat Atkinson*

When Joel Donin joined AIG Travel Guard in Canada as director of Marketing in February 2008, he had no idea what was about to befall the economy in general and the travel industry in particular. “We launched the marketing program in March and began to feel the meltdown one month later,” he notes with a touch of irony.

Recruited in the US, Donin was transferred here with a big mandate: to implement a multi-channel sales strategy for the Canadian travel insurance arm of insurance giant AIG. This included opening up a full-service direct to consumer sales channel—the product had previously been sold exclusively through travel agencies—and getting Travel Guard onto Canadian consumers’ radar screens. As the marketing manager explains, this was a tall order.

“Although we are resold in travel agencies across Canada, the brand that consumers really see



is that of the travel agency.

While consumers purchase the product, it's really an ancillary product; it's the fries with the burger. So our challenge was to create a brand around the fries and be able to build a value proposition for the consumer to either ask for that brand when they're in the agency or to search out the brand online.”

There had also been some discussion about implementing some best practices that the US entity wanted to test in Canada. AIG Travel Guard in the US had enjoyed great success using a mixture of public relations, mass media, direct marketing and online. Donin says that the company had been working an integrated campaign at a very basic level, that being, establish the brand, promote the brand.

“Here in Canada, we are up against Blue Cross, Manulife, RBC Insurance—well known brands—so if we want to be in that company, then we have to



financial meltdown in the US,” Donin explains. “We were able to leverage that and were able to build the kind of confidence and a prominent brand that began to get some share of voice,” he recalls. The goal was to achieve a full integration so this was supported by aggressive direct and online marketing and supplemented with public relations.

Donin says that as his career evolved from his original agency background, he saw lots of companies and best practices focused on creating proactive business communications that can be leveraged to support marketing campaigns, while building character and meaning into a brand. Earlier, as a brand strategist at Royal Bank, he had learned the value and stickiness a great brand can create with consumers and the marketing efficiencies that are possible. He recalls:

“What I brought to the strategy here and what I looked for in my vendors was an ability to think beyond their discipline. It's all much more organic now, I can't just look at our business and say our tactics are split between acquisition, retention, loyalty, trial etc.—it's all integrated—and it becomes a challenge to explain that to CFOs and CEOs when they say: ‘Tell me about your tactics and what they are aimed at and show me the metrics.’ I'm starting to get these leaders used to terminology around return on marketing investment as opposed to return on straight investment. They're starting to become much more aware of the nuance around this.”

be building castles in that sandbox to make us visible.”

Building the brand

In March 2008, a mass campaign was launched to provide umbrella coverage for all of the direct marketing activities to follow. Print, some highly targeted television, and a number of radio campaigns were used to build awareness.

“Certainly at the time, AIG was a wonderful brand lever for us because this was before the



Segmentation

To ensure the marketing budget would be used wisely, Donin had a simple study conducted against the company's small book of business. The study sought to identify the seasonality of travel, who was traveling when, where travellers reside, the income brackets that allow for a propensity to travel, and the frequency of trips.

After this, messages were shaped that were directed at particular groups. Pre-launch research identified what various groups knew about the product. The upshot was that although people

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Engaging your customers through the human dimension of rewards sourcing

Start with a customer-first approach to help reward your audience in a more meaningful way and drive a positive brand experience *By Paul Gallant*

Loyalty programs “reward” consumers for engaging with a company’s brand and sharing information about their buying habits. This exchange should be advantageous to *both* the company and consumer. Regrettably, many programs miss their mark—failing to address the human elements that drive consumer behaviour and offering rewards that primarily serve the needs of the host company instead. To help reward their audience in a more meaningful way and drive a positive brand experience, companies should start with a customer-first approach to reward sourcing.

designing a loyalty program needs to demonstrate *value for effort*, connecting with their target consumers on a *human dimension* that reflects *the target’s* interests, lifestyle and needs.

When I first learned about loyalty programs, I was taught “It’s not about the rewards.” The program design and financials were the primary considerations. This was in direct opposition to my promotions training, which advocated getting the biggest prize possible and selling it with “sizzle.” Now I know that there is an element of truth in both approaches. It’s not about the rewards, it’s about the *right* rewards, the

the reward experience needs to meet their real-world expectations.

Defining value

Value comes in many different forms. In loyalty programs, we typically refer to value in terms of hard or soft rewards. Hard rewards are products; merchandise, gift cards and travel. Soft rewards include preferential treatment, exclusive access to events—experiences that are less tangible than hard rewards.

Historically, consumers used to browse hard rewards via a flashy print catalogue and suppliers would stockpile enough

online. While the medium has changed, the rewards strategy has not changed enough. Although loyalty programs have done a good job of adding *experiential* rewards, *green* rewards and *charitable* rewards in response to consumer interest, the hard rewards offering has not evolved to reflect consumers’ real-life preferences. Reward sourcing is still often influenced by what appeals to the program owner or where the company can score low prices or bulk discounts.

Just-in-time loyalty inventory

Consumers are used to shopping retail and having a diverse variety of products to choose from. Most retail stores have tapped into the *human dimension* of their consumer base and play on the seasonal, age influenced or trend driven desires that motivate this base. Retailers know that buying decisions have as much to do with emotional and sentimental elements as with logical considerations such as convenience and price. A rewards

inventory of two-year-old stock can’t possibly meet consumers’ expectations. Just as stores stock differently for special events (Father’s Day, Canada Day, Back-to-School), reward programs need to feature an enticing and relevant set of rewards

see *Engaging your...* page 8



Just as stores stock differently for special events (Father’s Day, Canada Day, Back-to-School), reward programs need to feature an enticing and relevant set of rewards that reflects the consumer’s real world interests at the time they are browsing.

When it comes to consumer loyalty programs, consumers consider two things, “Is it easy for me to participate?” and “Is it worth my time?” Any company

ones that excite consumers and draw them closer to the brand by giving them value for their engagement. While there needs to be an aspirational aspect to rewards,

merchandise to support catalogue redemptions for approximately two years.

These days, loyalty programs have generally migrated away from print to

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from **Flying into the storm**, page 6

broadly understood travel insurance, they didn't understand what specific implications it had in their life when they travel. Donin says that results from pre-launch focus groups showed that young people tend to believe they are invincible. It isn't until they are married with children that interest in the product and category begins to build. It continues to build as older people understand that they could get sick while they are away.

The research identified that there was a need to educate so a number of tactics were implemented to provide information about travel insurance.

Donin emphasizes, "In effect, this was helping the entire category but in fact, it benefitted us and it added one of the key pieces to the brand character and personality that I was looking for: support information and enhancement of the travel experience and education. So AIG Travel Guard is not just a big insurance company, it's a large financial services company that cares enough

about you to inform you to make wise choices."

Database

Thereafter, it was time to build the database. The direct to consumer side of the business had to launch from scratch because Travel Guard had previously only been sold through resellers: travel agents, whose client base was unfortunately off limits. Since the marketing thrust was a multi-channel sales strategy, the emphasis was on providing strong support, interest and traffic at the retail level *and* the direct level.

"Five years ago, ten percent of all travel business was conducted online," explains the veteran marketing manager. "We're heading up into the thirty percent and bigger. I think it is a wise business move to be present in the channels where consumers are deciding to make their purchases." It was decided that consumers who wanted the ability to educate themselves regarding their destinations, and offers and availabilities, should also have option of purchasing their travel

insurance online from Travel Guard. Meanwhile, customers who wanted an in-person contact should also have the option of dealing with a travel agent.

At the outset, Donin and his team rented lists that were targeted against their segmentation information.

"PGePROPEL, our direct agency, was certainly instrumental there," he emphasizes. "There was good strategy out of that shop. I'm really quite satisfied because it truly has been a partner in helping me build the business. It's very entrepreneurial and that's what's required here. This challenge is not about

contest programs—that Travel Guard promotes with partners and its properties. These become a lead generation device. All of the travel business's tactics use the call to action: "Click, call or visit your Travel Guard travel agency." Consumers are given the choice of inbound direct by telephone, direct online, or in-person contact with a travel agent. The value proposition is a savings proposition with innovative product.

Other media

Today, Travel Guard has a Wikipedia presence. It's on Facebook. It's also

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that reflects the consumer's real-world interests while that consumer is browsing. Filling warehouses full of product that sits until it sells or becomes obsolete is the way of the past and unacceptable in the present. To grow in the future, loyalty programs will need to adopt just-in-time inventory, injecting momentum into their offering and keeping up with consumers' expectations.

The value to the company is that its participants will have the opportunity to earn and redeem for products that they see and want today. Not only does this make the company's incentive stronger, it builds the brand by association with cool, in-demand products. And more importantly, a revolving rewards selection will prompt participants to return more often to visit the site to see "what's new." For many of Maritz' programs, consumers make four visits to the reward portion of the site before selecting an award. Each visit offers additional interaction and brand building opportunities for the loyalty program sponsor.

Can a heavy focus on rewards trump the value of the loyalty program itself? No, because it is not just about the rewards. Rewards are tools to drive the relationship and enable dialogue between a company and its consumers. The right reward mix keeps consumers interested and engaged and can continuously promote the brand in a great way.

Given the current economic conditions, I'm frequently asked about whether rewards programs should move to "near cash," substituting merchandise for cash back or gift cards. I say no! At Maritz, over the first half of the year, we have seen merchandise rewards climb compared to the same time a year ago. While travel reward redemptions have slowed down in parallel with lower seat prices, merchandise has proven to be in high demand.

What explains this? Consider the human aspect of receiving a reward. The reward gives people a sense of occasion in the every day, and it prompts a powerful emotional response. This emotional response is the human dimension of loyalty companies strive for. Such a response can only be achieved by taking into consideration the unique elements that motivate a specific audience. While building a reward program that reflects consumer demographics, companies must also bear in mind the psyche of their customer base. Consumers expect to achieve *anything* they want *anytime* they want it. If a program cannot match that level of convenience and connection, what value is the company offering? And if the company is not offering any value, why should consumers engage with their brand? **DM**

Paul Gallant is the director of Loyalty, Incentives, Insight & Strategy for Maritz Canada, a marketing services company based in Mississauga, Ontario. Paul is a respected loyalty veteran with links to most of Canada's longest running, successful loyalty programs. He has worked with Aeroplan, Canadian Tire, AirMiles, Scene and TD Canada Trust, among others.

I can't just look at our business and say our tactics are split between acquisition, retention, loyalty, trial etc.—it's all integrated—and it becomes a challenge to explain that to CFOs and CEOs when they say: 'Tell me about your tactics and what they are aimed at and show me the metrics.' I'm starting to get these leaders used to terminology around return on marketing investment as opposed to return on straight investment. They're starting to become much more aware of the nuance around this.
Joel Donin

insurance, it's about e-tailing."

With database and segmentation now in place, Donin says that marketing can develop a further model and even look to certain verticals.

"Given the new economic realities, I've had to try to become much more precise with the tactics within the marketplace. With the increases in the marketing budget that I was initially projecting when I walked in the door while building the business—as we proved the efficacy of the marketing strategy and tactics and added more and more revenue, so would the marketing budget build. Given the new realities, that isn't the case." Because of this challenge, Donin says that he has accelerated the second phase, which is to partner with other well-known brands in the marketplace around certain verticals. This will enable Travel Guard to participate in cooperative promotions and partnerships that will enable viral promotions online.

PGePROPEL has been instrumental in establishing online promotions—

developed a Web site "Savvy Traveller," which is managed by PGePROPEL. The Site provides travellers with helpful information while permitting Travel Guard to be its sole advertiser. It's all in a day's work for Joel Donin, who sums up the process.

"It keeps me feeling like I'm learning a lot and there's the fun of connecting the dots," he admits. "Although I'm the client, I still feel like I'm driving the process from the agency side. I'm saying 'How do we connect this?' I need to inspire a consciousness between our PR agency, our DM agency and our online folks to be working together. PR generates content which goes onto "Savvy Traveller," and then when we develop a partnership and put out a promotion with a viral campaign, stuff generated from that goes on "Savvy," onto our [Travel Guard] Web site, into our database and then goes back into PR. It's very efficient in terms of the cost because as one piece is generated, it gets spread across tactics. In aggregate, it's generating ROI." **DM**



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Retention is the new acquisition

How your company or brand chooses to interact with customers along the push-pull continuum in an interconnected world can transform retention into a powerful acquisition channel *By Phil Olivieri and Miro Slodki*



sk any business today and it will profess to be both customer-centric *and* long-term focused.

Where in the past, customer acquisition at any cost became *too* costly, today's emphasis on customer centricity over the long term gives rise to forward-thinking customer retention initiatives that actually create value. Some would even argue that this kind of logic is the foundation for Alfred Rappaport's famous dictum: *"Without customer value there can be no shareholder value."*

As any marketer will attest, the calculus of the Life Time Value (LTV) metric encapsulates many of marketing's most important customer behavioral outcomes—the value stream (revenue/margin/profit) and the costs associated with new customer acquisition, the retention growth of next best customers (as a function of response rates to up-sell and cross-sell offers), the reactivation of lapsed customers, the loss of customers, the impact of word of mouth referrals, and finally, the discount rate to reflect the inherent risk/volatility premium of the financial value stream — all of which provide an ongoing tally of that customer/segment anticipated retained present value.

Still, there are some things LTV doesn't accommodate very well, beginning with the basic formula where the use of a single average discount rate runs the risk of leading to under spending on existing customers and overspending on new customer acquisition efforts. Others have also noted shortfalls accommodating the social multiplier network effect, reflecting a brand's incremental advantages as it crosses threshold levels of scale/community. (See Gupta, "Value of a Free Customer" www.cci.som.yale.edu/events/documents/SunilGuptaYaleMay2006.ppt).

Hogan et al (2002) also speaks to underlying drivers of purchase continuity such as quality and service satisfaction, as well as competitive effects.

Defining retention

So how do we define retention? It's actually a trickier question than it seems. At the most basic level, everyone will agree that retention can be validated at the last instance of purchase. What about the time in between, especially for those who buy infrequently or irregularly? Consider as well that many view retention to be both a state of mind *and* a state of being.

Not surprisingly then, our definition of retention will form the cornerstone not only of the brand strategy (catering to buyers at one end or partners at the other) but of the company itself. Since how the company or brand chooses to interact with customers (and vice versa) along the push-pull continuum in an increasingly interconnected world through experience, word of mouth, and reputation, can *literally* transform retention into a powerful acquisition channel.

In fact, Gupta, Lehman & Stuart showed that improved customer retention had

the largest impact on customer value, followed by improved margins with reduced acquisition cost having the smallest impact. The results show that a *one percent* improvement in customer retention enhances customer value (and, in turn, firm value) by approximately 2.45 percent to 6.75 percent, whereas a similar decrease in the discount rate increases customer value and thus firm value by only .5 percent to 1.2 percent. In other words, the retention elasticity is almost five times the discount rate elasticity. (See "Valuing Customers," http://papers.ssrn.com/sol3/papers.cfm?abstract_id=459595).

If keeping customers creates superior value, then it follows that greater success will come to those better able to establish not only a value differentiated brand, but also actively engaged partnerships. Support for this comes via McKinsey who noted that consumers tended to have one of three types of relationship orientation: emotive (strong brand attachment); inertial (habitual brand buyers either uninvolved or don't feel need to change); or deliberative (frequently reassess and recommit to the brand). (See McKinsey, "Customer retention is not enough" http://www.huizenga.nova.edu/5017/ReadingList/Coyles_Gokey%20-%20Customer%20retention%20is%20not%20enough.pdf).

Moreover, McKinsey suggests the greater opportunity lies not in trying to mitigate against outright customer defection, but in seeking to influence expenditure shifts between competing offerings. In its calculations, managing the upward migration of a brand's share of requirements (with engaged customers) could have as much as *ten times* more value than concentrating on defections alone. The quality of active engagements is further corroborated by an IBM retail sector study which reports that at [any] given level of spend, a greater proportion will come from brand advocates than non-advocates. (See "Why advocacy matters to apparel retailers" http://www.ibm.com/ibm/ideasfromibm/us/retailers/01142008/images/Apparel_report_final.pdf).

The pendulum swings back

We are all familiar with the fabric of social connectivity first studied in Milgram's Small World experiments. Since then, we have seen many popularized models (Gladwell's *Tipping Point*, Duncan J. Watt's *Big Seed*, one can even include the field of Behavioral Finance) recognize the influence of those around us in our decision making. Add to this the evolution from linear to scale power laws made possible by our newfound global social network connectivity, and one quickly realizes that the pendulum of marketing which has swung from a mass communication/influence, to segmented/individualized communication/influence, is swinging back – to a place somewhere in the middle where both mass and individual communication coexist.

This reality brings us full circle to the

understanding that retention is both behavioural and attitudinal. Armed with that knowledge, some marketers eagerly embrace the chance to engage customers in co-creational activities across all elements of the brand, while others pursue a traditional behavioural relationship orientation. In either event, from a CRM practitioner's perspective, there are several best practices companies can adopt and implement to realize retention as the new acquisition.

First, it is important to identify best, next best, and the worst customers. A mutually beneficial business relationship requires that we identify best and next best customers and collaborate with them through a dialogue to create new value that will benefit both parties over the long term. Deciding which customers to focus on and invest in for growth and which

up notice to customers that some aspect of the brand promise has been below expectation, but that the brand is aware of the situation. That "simple" notice not only avoids unnecessary customer enquiries, but also conveys the sanctity which the brand upholds in terms of consistent service delivery.

A best practice is to develop a master contact management plan and strategy (CMP) that will serve as a communications road map and optimize interactions, both proactive and reactive, through appropriate channels. The CMP is a multi-dimensional matrix that assigns appropriate messages and treatments by customer across their life stage and life cycle while also taking into account propensities for cross-sell, up-sell and attrition. Within the CMP, companies can assign relationship investment thresholds based on the value of the

interact with the enterprise;

- integrating marketing operations: to help marketers improve collaboration and facilitate cross-channel planning, design, execution, and measurement; and
- anticipating new customer insight and channel capabilities: to understand and incorporate attitudinal fusion, mobile channels, and social networking relationship channels appropriately.

In addition, what's managed also needs to be measured to ensure the success of all customer retention efforts. Performance measurement is a business imperative and key performance indicators (KPIs) must be created to depict the current state of the customer and generally include such metrics as retention rate, incremental value (revenue/margin/profit), engagement index, etc. And while there is much excitement about the promise of social

...Gupta, Lehman & Stuart showed that improved customer retention had the largest impact on customer value, followed by improved margins with reduced acquisition cost having the smallest impact.

to simply maintain, and in some cases neglect, is the first and most important strategic decision toward intelligent customer retention. It is important to recognize that value creation is a joint experience between the brand and the customer and consequently, value will vary with each. Basic CRM analytics and simple business rules allow companies to identify and flag these customers in their data warehouse.

Curiously, many companies often overlook the fact that managing customer retention is both proactive and reactive and both need a plan to succeed. Proactive management requires businesses to be able to anticipate customers' needs based on past and current behaviour, i.e., lifecycle (products or services that customers need throughout their lives), life stage (student, younger independents, older independents, families, retirees) and attrition propensity. One might also consider some form of customer appreciation retention bonus to customers for having graciously supported the brand in the last year. In fact, those proactive measures may play a significant role in any reactive retention management plans the business puts into action since it has some foundational goodwill investment to draw against its account with the customer.

Straddling the proactive/reactive management of customer retention are event detection triggers which can be established in the customer data warehouse using business rules and operational processes to trigger a heads

customer, which translates into richness of offer, optimal channel selection, etc. The CMP can be made operational using campaign management technologies for both outbound and inbound channel interactions.

Campaign management

Campaign management applications (CMA) help companies evolve by shifting to a more customer centric strategy that delivers consistent and superior experiences to more savvy and demanding customers. CMA leverages the increasing proliferation of addressable attention channels — including inbound (call centre, retail locations, branches with treatment prompts) and outbound (direct mail, statement/invoice with personalized messages); and strives for responsiveness to individual customer behaviours by leveraging real event detection in near real time. CMA functionality also helps companies achieve the transition to customer centricity by:

- being customer-aware: to capture what a buyer is saying both explicitly, i.e., leveraging existing warehouse investments, and implicitly (to process that information to determine what to say next); providing centralized decision making with optional decentralized execution and coordination: to determine the best marketing message to extend in outbound and inbound marketing channels, online and offline;
- enabling cross-channel execution: to help drive message and treatment consistency, as well as a synchronized seamless experience as customers

media channels, there is also uncertainty about the measurement of conversations and the application of any learning to everyday customer management practices. To do nothing is the worst decision, to test and learn the wisest.

So then perhaps the most important learning of all is that, as marketers and CRM practitioners, we need to challenge the comfort of our data warehouse defined universe to include additional "truths," acceptance of which will bring one back to the beginning and excel in a connected social world where increasingly, retention is the new acquisition. **DM**

Phil Olivieri is managing director and senior consultant at PDO Associates, an independent full-service Customer Relationship and Loyalty Management consulting firm located in Markham, Ontario. PDO Associates helps companies plan, design and implement optimized customer relationship and loyalty management strategies to ensure consistent customer experiences across the enterprise. For more information, contact him at (647) 899-7107 or phil-o@rogers.com.

Miro Slodki is the sole proprietor of Brand Central, a consultancy providing strategic/tactical support for customer centric brand marketers seeking to build stronger, more profitable customer affinity. With a bias toward street-level execution, Miro's experience spans marketing (direct brand, product, and service) market research, loyalty, sales and relationship management in both the B2B and B2C spaces. He can be reached via e-mail at: miroslodki@yahoo.ca

DMPEOPLE



Ken Blakeley

FUSE Marketing Group Inc. is pleased to announce the recent addition of **Ken Blakeley** to the firm as group account director. Previously, he held senior roles as director at OSL Marketing.



Alex Kooluris

Alex Kooluris has joined Purple@Epsilon as vice president, general manager. He will play a critical role in new business development for the firm's healthcare services practices.



Glen S. Yurjevich

Neenah Wisconsin-based Outlook Group Corp., a leading packaging, direct marketing and printing company, has announced the appointment of **Glen S. Yurjevich** as chief executive officer. He most recently served as interim president of Whitefield Industrial Coatings.

Major brands turn to Transcontinental for complete marketing services

TORONTO, ON—This spring, Transcontinental's Marketing Communications Sector has signed a number of brand leaders as new clients in all securing over \$2.5 million (CDN) in new business.

"We recognize that marketers have a wide range of needs, so we've made it our priority to continually invest in new services and technology that allow us to provide our customers with a complete range of marketing support services for their businesses," said Nicky Milner, vice president, Premedia Group, Transcontinental Marketing Communications. "With our recent acquisitions of ThinData and Conversys, our online services are second-to-none. We offer our clients access to a total marketing solution that delivers improved return on their marketing investments."

While Transcontinental's new customers come from a wide range of industries, the new contracts all follow a common thread in that they focus on the company's ability to provide marketers with a comprehensive set of solutions that are developed to address customers' diverse business needs and expand their marketing mix.

Highlights of Transcontinental's new business wins include:

- Readers Digest Canada: Renowned

global publisher for more than 55 years, Reader's Digest has been a dynamic force in the Canadian marketplace. In need of outsourcing for its marketing production, production coordination, proofreading, translation, design and packaging and art work services, it turned to Transcontinental.

- The Shopping Channel: As Canada's leader in convenient home shopping, appealing images are essential for sales success. Transcontinental Digital Services is using its more than 25,000 square feet of versatile photo studio space to produce a series of images designed for high impact. Capturing the best images of jewellery, cosmetics and a variety of other products, Transcontinental's environment allows the Shopping Channel to better showcase its "best sellers."
- Princess Auto: As a 75-year-old Canadian retail chain specializing in farm, industrial, garage, and surplus items, Princess Auto has teamed up with Conversys to help it develop an engaging online flyer. Relying on Transcontinental's retail expertise, Princess Auto will be able to leverage this new marketing tool in other areas of its marketing strategy.
- The Bargain Shop: As a growing Canadian-owned retail chain, The

Bargain Shop has turned to ThinData, a Transcontinental company, to help it develop and manage e-mail marketing programs that cost-effectively reach its expanding customer base.

- Purolator Courier: Purolator, Canada's largest courier company and one of Canada's Ten Most Admired Corporate Cultures™ (2008), has enlisted Transcontinental Database Marketing to enhance its use of customer data. The Purolator Small Medium-Business Marketing team will be using Transcontinental's marketing automation services to address its business needs, which include marketing data management; analytics driven customer intelligence and campaign management.

Under this marketing communications umbrella, Transcontinental offers all of its customers a wide range of services including: print-to-Web solutions for electronic flyers and catalogues; custom contract photography; database marketing and automated solutions; e-mail marketing campaigns; and creative content production outsourcing that includes production coordination, translation, page layout and packaging. This diverse set of services allows its customers to achieve their marketing objectives.

WORTHKNOWING

US consumer demand for digital coupons soars in 2009

MOUNTAIN VIEW, CA—Coupons.com has announced that in just over five months, the savings printed on its digital coupon network in 2009 surpassed the \$313 million in value printed in all of 2008. During this period, the value of savings printed increased 212 percent compared to the same period last year.

"We're seeing increased momentum in all aspects of our business," said Steven Boal, CEO of Coupons.com in a statement. "Consumers are adopting digital coupons in droves as they search for savings, and more leading brands are turning to digital coupons to build relationships with those consumers. We see no signs of a slowdown and are targeting to print approximately \$1 billion in savings by the end of the year."

Increased interest in digital coupons by both brands and consumers is converging to drive unprecedented growth. Companies that already utilize digital coupons are using them more often, while more companies are discovering digital coupons to promote their products for the first time.

"We've been very pleased with the success of our digital coupon campaigns and have been steadily moving more and more of our couponing budget out of the newspaper and onto digital delivery," said Karl Schmidt, director of promotion marketing at General Mills. "Digital's reach and distribution has grown to the point where it is approaching that of newspaper inserts."

More than 40 million Americans currently print online coupons, according to Simmons Market Research Bureau, and continued consumer adoption is being driven by many factors. The tough economic environment is one factor, but experts say that users expect to continue their current saving behavior in the future—even in good economic times.

Other factors include:

Convenience. People like the ability to browse and print coupons at their convenience, day or night.

Continued increase in the number of people with Internet access and comfort with online content. Much like the increase in adoption of online magazines and blogs for news, people are extending that comfort to other types of content, including coupons.

Newspapers are declining in circulation and, in some areas, are struggling to survive. People are looking for alternative ways to get coupons instead of the traditional inserts in newspapers. The number of people that only print coupons from the Internet and never use newspaper coupons rose a dramatic 46 percent to six million Americans in 2008 compared to 2007.

Internet coupons are attracting a new demographic of coupon users that does not subscribe to the newspaper, let alone clip coupons. Through the Coupons.com Web site, Twitter feed and Facebook application, a whole new generation of people is discovering coupons for the first time. Coupons.com plans to introduce new ways to deliver coupons in the coming months including in-store, in-home and mobile devices to further penetrate this new group of coupon users.

Today, Coupons.com is the No. 44 largest U.S. Web property with 17.2 million unique monthly visitors and is the No. 1 site on the Internet for Coupons/Rewards, according to Nielsen NetRatings. The Coupons.com publisher network reaches more than 75 million consumers through thousands of Web sites, including Coupons.com and shoppers' favorite name brand Web sites and grocery and drug store sites.

CMA issues call for entries for 2009 CMA Awards

Entries are now being accepted in the 2009 Canadian Marketing Association Awards competition. The biggest and most prestigious marketing awards program in the country, the CMA Awards honour Canada's most innovative and creative marketing campaigns that have delivered measured results.

The deadline for entries is July 16. Winners will be announced at the CMA Awards Gala on November 27 at the Westin Harbour Castle in Toronto. Awards categories, entry guidelines and downloadable entry forms can be found on the CMA Website. *For more information, please contact Jeanette Soo at (416) 644-3763; or by e-mail jsoo@the-cma.org.*

CMA chooses ThinData to "plug in" to this country's marketing community

TORONTO, ON—ThinData, a Transcontinental company, is pleased to announce it has been awarded a contract by the Canadian Marketing Association (CMA) to provide the industry group with e-mail strategy and creative design for its e-mail marketing programs.

Through this new partnership, ThinData leverages its e-mail marketing expertise to assist CMA with improved content and segmentation of its e-mails, as well

as to refine the creative approach while enhancing e-mail deliverability. With CMA's monthly e-mail volume, ThinData will drive the e-mail strategy for all communications, including regular weekly updates, breaking news, notification of courses and events, in addition to e-commerce related e-mails. The goal is to simplify the e-mail process for the Association and enhance the value of the e-mails for its members.

"Our members are the country's

most influential and savvy marketers, and as such, they demand the most effective and compelling marketing communication," said Alan Flint, vice president, Membership and Marketing Services, CMA. "ThinData has an excellent track record for e-mail marketing and, as part of Transcontinental's Marketing Communications Sector, also has resources in offline and cross-channel marketing. This made ThinData a great

partner for us."

ThinData will work with CMA to ensure that e-mail content is timely and relevant to its members. By adapting messages as needs evolve to help CMA create e-mails that are dynamic and easy-to-use, reading and interacting with e-mail content will be more efficient. This new partnership is expected to provide CMA with a well-organized process and cost-effective campaigns which will solidify its position as Canada's leading marketing association.

"We've always been strong advocates and members of CMA because it is essential to the growth and development of the marketing profession. We're very pleased that CMA chose ThinData to provide it with the strategy, creative and technology to strengthen relationships within the marketing community through e-mail," said Chris Carder, president of ThinData. "CMA is an association that understands the power of e-mail and is committed to using it successfully."

WORTHKNOWING / cont'd

Survey says: 86 percent of Canadians would opt for travel

Given the opportunity to spend one million *Air Miles* reward miles, 86 percent of Canadians say they would opt for travel, according to a recent *Air Miles* survey. However, at a time when stretching dollars is important, many collectors are thinking about sharing their million miles with family and friends (45 percent) and others are looking to redeem for merchandise (35 percent). To give Canadians the opportunity to turn these dreams into a reality, the *Air Miles Reward Program* is conducting the biggest miles giveaway in its history and will give one collector one million reward miles to redeem, making them Canada’s first “Mile-ionaire.”

The survey results uncovered that Atlantic and Western Canadians are more likely to redeem their miles for a journey (91 percent each) while Quebecers would redeem their miles for merchandise (46 percent) or on everyday items like gas or groceries (26 percent). Other uses of *Air Miles* reward miles included giving a percentage to charity. Traditionally associated with travel, *Air Miles* can be redeemed for many products and entertainment options, including electronics, gift cards, spa getaways, sporting events, amusement parks across North America, and more. Collectors can also choose to donate reward miles to *Air Miles* charities of choice, including Special

Olympics Canada, Kids Help Phone and WWF-Canada.

Canadians still have visions of luxurious accommodations and five-star treatment. With one million reward miles at their disposal, those collectors could:

- Travel twice a year for life
- See the Seven Wonders of the World
- Cruise around Europe in a rental car for five years
- Spend 3.5 years in Inter Shell Continental Hotels around the world

Some 27 percent of collectors were likely to redeem their miles for extraordinary amounts of everyday items such as gas and groceries. This could mean:

- 13,333 car washes
- 134,447 liters of fuel from Shell
- 21 years of groceries for the average Canadian household

Some 45 percent of collectors stated they would share their winnings with friends and family. To entertain those nearest and dearest, a collector could:

- See more than 11,400 movies at the theater, snacks and drinks included;
- Bring 50,000 friends and family to the Rogers Centre five times for Toronto Blue Jays games;
- Invite 7,400 guests to enjoy Galaxyland or World Waterpark at West Edmonton Mall.

Boire Filler Group: Ten years of bringing companies closer to their customers

Last month marked the tenth anniversary of Boire Filler Group. What began as a two-man shop focused on data mining, has grown into a group of 15 analysts and marketing specialists working closely with clients to help them make better and more profitable business decisions. Founded by Richard Boire and Larry Filler in June 1999, Boire Filler Group (BFG) has reached its milestone tenth anniversary, standing as a leader in the Canadian marketing industry.

Guided by Customer Relationship Management (CRM) principles and best practices, BFG has leveraged its core analytical skills to enable forward thinking companies to thrive in competitive markets. As the Company’s roster of blue chip clients has grown, so have its services. Predictive analytics, data management, business intelligence reporting, and customer value management solutions are delivered to some of Canada’s largest organizations across a variety of sectors: financial services, telecommunications, retail, automotive, publishing, healthcare, high-tech, consumer packaged goods, and not-for-profit. During its tenure, BFG has played an active role in the Canadian marketing community.



Partners Richard Boire and Larry Filler (kneeling) with the Boire Filler Group team at the Company’s tenth anniversary celebration. Behind Rich and Larry from left to right: Alyssa Ali, Luke Foran, Grace Yeung, James Sauter, Dan Twinn, Harry Jun, Jim Anderson, Thomas Chu, David Davidson, Mustafa Sadeh, Dimitri Bogri, Nizar Ali. Absent: Michael Levinshtein.

The Company is a long standing member of the Canadian Marketing Association (CMA), with Richard Boire and Larry Filler having served as executive members of CMA councils and conference organizing committees. Currently, Richard is chair of the Marketing Technology and Database Intelligence Committee of the CMA, while Larry is a board member of the Association for the Advancement of Relationship Marketing (AARM). Richard and Larry are frequent

contributors to marketing related publications, such as *Direct Marketing* and *Marketing*, and are sought-after speakers at industry conferences and seminars. Both partners contribute to the knowledge of tomorrow’s leaders in marketing intelligence and data mining by teaching at George Brown College and Ontario Institute of Technology (OIT). A number of BFG’s current employees are graduates of these programs. For more information, visit www.boirefillergroup.com.

U.S. travel and hospitality loyalty program membership reaches 556 million

CINCINNATI, OH— Membership in travel and hospitality industry loyalty reward programs has climbed to 556 million, according to the 2009 Colloquy Loyalty Census, a study that measured the scope of U.S. loyalty marketing in 2007 and 2008. The breakdown on 2009 Loyalty Census numbers for the travel and hospitality sector is as follows: Airline frequent flyer programs 277.4 million, up 9% (since 2007 Census); Hotel reward programs 161.9 million, up 26% (adjusted to account for 2007 Census revisions); and Gaming reward programs 106.0 million, up 37%. Colloquy measured Cruise Line and Car Rental programs as a separate travel sector category for the first time in its 2009 Census, tabulating membership at a total of 10.7 million. A loyalty marketing program recognizes and rewards the best customers of a business. Colloquy’s travel and hospitality loyalty data is part of a broader U.S. loyalty marketing census covering 13 industry sectors. The census tabulates program memberships, not unique individuals. Total membership in U.S. loyalty reward programs is 1.8 billion. Colloquy provides a complete report on the 2009 census in a white paper titled, “The Big Sort: The 2009 Colloquy Loyalty Census.” The paper is available free of charge at www.Colloquy.com/whitepapers. Colloquy’s 2009 Loyalty Census shows that for the first time in loyalty marketing history, the number of memberships in airline frequent flyer programs has been surpassed by memberships in another

sector, specifically financial services. The 2009 census reveals that credit card reward program memberships outnumber frequent flyers 422 million to 277.4 million. Industry experts generally identify American Airlines’ creation of the AAdvantage program in 1981 as the launch of today’s loyalty marketing era. “The travel industry pioneered the modern loyalty program,” said Colloquy partner Kelly Hlavinka, who co-authored the 2009 census white paper with Colloquy editorial director Rick Ferguson. “As first movers, they have the accolades – and the bruises – as constant reminders of what was started in 1981. Since travel loyalty programs were launched in another acute recession, it’s fitting that this current recession should present another major turning point for the future of airline and hotel loyalty programs.” Hlavinka said airline and hotel loyalty operators face a new challenge given the ubiquity of loyalty programs in so many other sectors like financial services and retail. “After all, we have found (in the 2009 census) that the average U.S. household has enrolled in over 14 loyalty programs, yet participates in only about six of them,” she said. Citing the increased scrutiny that dreadful airline financial performances have brought on frequent flyer program value, co-author Ferguson said some airline executives might wish they could time-travel back to 1981 and prevent American Airlines from launching the AAdvantage program in the first place. “But airline mileage sales are still so

lucrative for many airlines that it’s hard to imagine these programs scaling back anytime soon,” Ferguson said. “In some cases, the airline makes more money selling miles than they do flying planes.” In other key travel and hospitality findings from the census study, white paper authors Hlavinka and Ferguson wrote:

- Bad times inevitably lead non-believers in the finance department to cast a skeptical eye on Hotel loyalty programs, and we may see a short-term reduction in program funding by some big players... (But) the industry is united in its belief that reward programs continue to offer the best platform for retaining profitable customers. When the rebound occurs, pent-up demand for business travel will see Hotel program operators leading the charge to build value-added customer relationships.
- Don’t expect the party to continue – it’s now hangover time in Gaming loyalty. With the recession devastating the Las Vegas economy, image-conscious corporations ending junkets to Vegas and Atlantic City and consumers pulling back hard on the leisure-spending throttle, Gaming companies will be happy to live with what they have in terms of (loyalty) membership roles. Colloquy is a provider of loyalty marketing publishing, education and research. Its 2009 Loyalty Census is based on information from its own archives, program web sites, sponsor-company press releases, annual report filings, third party publications and research reports.

I Love Rewards raises \$6.9 million in Series B funding to expand capabilities in sales, marketing

TORONTO, ON and BOSTON, MA—I Love Rewards (www.iloverewards.com), North America’s fastest growing rewards and recognition program provider, announced that it has secured a \$6.9 million Series B financing round led by GrandBanks Capital, a Boston based venture capital firm with participation by prior investors JLA Ventures and Laurence Capital. The capital will be used to accelerate I Love Rewards’ growth by expanding its sales and marketing capabilities to capture a share of the \$47 billion rewards and recognition industry. “GrandBanks Capital is behind some of the most successful technology companies today,” said Razor Suleman, founder and CEO of I Love Rewards. “With their experience and support, we will be able to continue building a great company, service our existing and future customers and meet the needs of our employees.” “The I Love Rewards vision of becoming the global leader aligns with our desire to invest in the best growth companies in Canada,” said Ryan Moore, General Partner of GrandBanks Capital. “I

Love Rewards offers a compelling value proposition with its innovative proprietary Software-as-a-Service technology that provides immense value to human resource and sales professionals across North America.” The I Love Rewards Series B Funding follows a series of key milestones: Record growth in Q1 of 2009, reporting a 187% increase in gross billings and 253% increase in new customer acquisition year over year. Some \$11.6 million in total capital raised over the past 18 months. The Series A financing round closed in 2008, which was led by JLA Ventures. Awards include: named one of PROFIT Magazine’s Fastest Growing Companies, one of the Top 10 Technology Companies and a Top 100 Employer. I Love Rewards is a Web-based provider of employee rewards and recognition, sales incentive and service award programs that works with top employers and leading companies such as Microsoft, Marriott, ConAgra and Bell. For more information please visit www.iloverewards.com.

REGIONALREPORT

by Pat Atkinson

Waterloo Region, Town of Guelph

This is the first in a series of Regional Reports that will shine the light on Canada's small-city marketing agencies, mailing houses, printers, and more. Find out what makes these businesses successful and how they overcome the challenges unique to their markets.



HOW DO YOUR LOCATION, AND THE MARKET, HELP, HINDER, AND OR ENHANCE YOUR BUSINESS EFFORTS?

Scott Doern, Mail-It Corp:

It hinders them. Approximately 95 percent of our business comes from Guelph, Kitchener and Waterloo. We do a lot of weekly and monthly catalogue (Pub Mail) applications for local agribusinesses. We also manage Addressed Admail for fundraisers on behalf of local hospitals and Unaddressed Admail for political parties and local businesses. We also offer machinable mail services but are hindered by Canada Post because all of our mail is inducted into the Kitchener depot. As it stands right now, Kitchener will not accept machinable mail. Therefore, all machinable mail has to be sent to Stoney Creek. On a 5,000 piece mailing, the \$150 I can save my clients in postage costs is now squandered on shipping costs. This hinders us. We had a meeting with our Canada Post rep who told us that CPC's goal is to have all mail machinable. Here we are trying our best to accomplish that and it can't be done. For example, a client company could theoretically send their artwork to a Mississauga-based MSP and receive that \$150 savings because its mail could be dropped directly into Gateway. Gateway automatically

forwards machinable mail and Letter Mail to South Central, and this gives companies that are local to them an unfair competitive advantage.

DO POTENTIAL CLIENTS HAVE RESERVATIONS ABOUT WORKING WITH YOU? IF SO, WHY?

Scott Doern, Mail-It Corp:

We would like to do more business with the GTA but people think that Guelph is the other side of the world. A courier service that delivers a job from Mississauga to Markham charges \$40 and yet it is covering more kilometres and taking more time than it would require to go from Mississauga to Guelph. The delivery charge from Mississauga to Guelph is \$80. People hear the word Guelph and have an immediate bias that it is far. My guess is the majority of people in our industry don't know that there is wonderful direct marketing and or direct marketing services available outside of the GTA.

WHAT FACTORS MUST BE CONSIDERED WHEN OPERATING IN GUELPH OR WATERLOO?

Anne Marie Heinrichs, AMI Business Solutions:

The market here is highly fragmented and dispersed. Small businesses have to work hard to make a connection with each other and market to large companies. The other side of our business, the sales and distribution of magnetic business cards, is based entirely on local sales. Since 2007, we have distributed more than three million magnetic cards in the area.

Dave Ward, Highland Marketing:

Being here underscores the importance of creating a niche and ensuring we work like an extension of our clients' own internal team. We also provide hand work here that big mailing houses in Toronto would never consider or that would otherwise be prohibitively expensive.

HOW HARD IS IT TO FIND QUALIFIED STAFF?

Glen Drummond, Quarry Integrated Communications:

Our founder, Alan Quarry, has taught fourth-year and MBA-level marketing communications courses at Wilfrid Laurier University since 1991. He has also served on the professional advisory board of the Graphic Arts and Advertising program at Conestoga College since 1990, is a member of the Chancellors Circle at the University of Waterloo, and is also the assistant chair of its advisory committee for the faculty of arts program. I'm a regular lecturer on advertising in the Communications Studies department of Wilfrid Laurier University so we have a lot of opportunities for top student referrals. We are also part of a work-study program with the University of Guelph. These activities enable us to draw on the best and brightest intellectual property. Our average employee tenure here is ten years.

Randy Litchfield, Inbox Marketer:

We are more fanatical about customer service than anything else. We tend to hire technology employees and then teach them the discipline of direct marketing. In other words, we hire for attitude and train for success. As well Geoff Linton, our vice president of Business Development, lectures on direct mail and marketing strategy at Conestoga College in Kitchener-Waterloo so approximately 50 percent of our recruitment takes place there.

WHERE DO YOU LOOK FOR NEW CLIENTS?

Cam Shapansky, Blue North Strategies:

We invested in communications technology infrastructure and developed a niche called White Page Marketing™ whereby our clients begin every communication to a customer with a blank page and work up.

We don't really actively look for clients, they tend to find us through referrals or as an extension of work we have already done. We work with local clients such as Open Text, but we also have clients on the West Coast in BC, New York and California too. In fact, I am going down to open an office in California shortly. Our clients range from large US and Canadian nonprofits to financial services companies, to big agribusinesses.

HOW MUCH DO YOU FOCUS ON WORKING WITH LARGE LOCAL COMPANIES?

Glen Drummond, Quarry Interactive Communications:

We work with some of the world's most scientific products and technologists. Approximately 25 percent of our business is local, another twenty-five to 30 percent is derived from the Toronto area, and half of our business originates from Europe

and the US. We maintain a US office in the Raleigh-Durham area to deal with the hub of American companies we are serving there. Locally, we deal with RIM and Open Text. In total, we have a 125-plus person North American team focused on helping clients build their business.

Randy Litchfield, Inbox Marketer:

We offer everything from self-serve to full-serve and anything in between: from best practice licensing to full-service strategic with competitive analysis. We provide total flexibility and set out to

really satisfy the customer. Approximately 50 percent of our business comes from US clients. The other 50 percent is Canadian—of which 75 percent is derived from Southwestern Ontario.

Monica Reid, Emerge2 Digital:

We have been in business for over 20 years and work with local companies and national organizations whose head offices are located in Toronto. Right now, we are involved with a client that is number one in the world in its market. Its audience is the casino business.

REGIONAL REPORT *cont'd on page 13*

WHO WE VISITED

Emerge2 Digital Inc.

This firm focuses largely on the B2B realm, providing expertise in Web site, e-commerce, and online private community development; as well as e-mail, integrated, and print direct mail campaigns.

Highland Marketing

This mail service provider offers a complete range of data and lettershop/fulfillment services to both smaller businesses and large multinational corporations. The company also specializes in the areas of pharmaceutical fulfillment, proxy mailings and database re-structuring.

Loyalty Match

This start up business (www.loyaltymatch.com), describes itself as "the first person-to-person marketplace that enables loyalty program members to trade or buy reward merchandise, services and entertainment and leisure activities."

Quarry Interactive Communications

This sophisticated marketing agency helps clients build their business by designing and integrating brand experiences that build strong, profitable customer relationships.

AMI Business Solutions

This firm operates an events and networking program "Please take my card," for small businesses in the area. It also produces custom printed,

magnetic business cards that enable regional firms to advertise their products and services over an extensive time frame due to the cards' shelf life.

Blue North Strategies

This company focuses on data-driven communications. It specializes in White Page Marketing™ where every document, print or electronic, begins as a "white page" and builds itself according to the needs of every individual customer or donor. Sophisticated data analysis techniques ensure that all communications reflect the preferences and passions of every recipient.

Inbox Marketer

This innovative company uses electronic publishing, database marketing and e-mail execution to create highly effective marketing communications programs for private, public and not-for-profit organizations in Canada and the US.

Mail-It

This firm is a full service lettershop that provides quick and accurate mail processing to ensure clients receive the best possible postage rates from Canada Post. With its specialized workforce, state of the art computerized sortation software and hi-tech mailing equipment, this company offers a full range of services: mail sorting, mail preparation and data services.

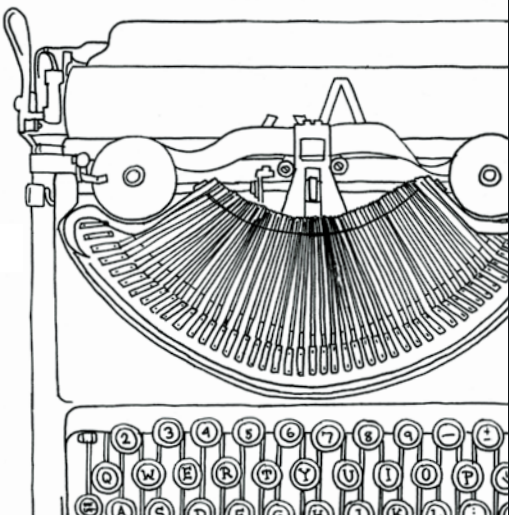


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Highland Marketing

A little over a decade ago, after an extensive IT career, Dave Ward was weary of the long commutes in and around the GTA that were a regular by-product of his work.

"I had a meeting in Guelph one day, it was the middle of August and the traffic on the way out of Toronto had been gridlocked," he explains. "After the meeting, I drove into the Town of Fergus and it was the most beautiful place I had ever seen. My kids were still young and in school at the time. I brought my wife Christine up to have a look and we moved there in December."

Being of Scottish descent, the Ward Family loved the Town's Scottish flavour and involvement with the Highland Games so in 1993, when they were looking for a name for their new business startup, Highland Marketing seemed a natural fit as did the company's emblem, a highlander leaning on his "claymore," a sword with an extremely heavy hilt. (Today, a real-life claymore occupies a place of honour in the middle of the firm's conference table.) Established in Fergus, the firm began by offering manual postal sorts and soon evolved to automating the sorting processes and offering many data related services to its growing client base.

In January 2004, Highland relocated to a secure 6,400 square foot facility in the north end of Waterloo.

In addition to providing a complete range of data and lettershop/fulfillment services to both smaller businesses and large multi-national corporations, it has grown to specialize in the areas of pharmaceutical fulfillment, proxy mailings and database restructuring.

"We principally look for business through the current customer base," Ward explains. "A lot of what we do is retentive sales using The Highland Marketer, a newsletter that showcases our services and uses VDP." He adds, "We let the Toronto market come to us if it wants to but it's been a bloodbath there. We're seeing prices today coming out of there that are cheaper than work we were doing back in the mid-1990s."

Sweet spots

Highland has been providing pharmaceutical fulfillment services since 1999. It works closely with McNeil Consumer Healthcare, Johnson & Johnson (Toronto) and Pfizer to name but a few. Ward cites a recent example where his firm sourced pillow boxes as containers for pharmaceutical samples, had the boxes produced to exact specifications to ensure the best mail classification and rate, assembled the boxes in house and managed every aspect of the mailing. Over the years, the firm has also provided fulfillment services to clients in other industries, based on the

same kind of strict procedures as those required by the pharmaceutical industry.

Highland also works closely with local agri-businesses that produce magazines—providing multiple sorts of various permutations and combinations to enable these clients to avail themselves of regional rates. "They are the second best rates available to publications," Ward explains.

For the past six years, Highland has also been conducting proxy mailings and other services for financial services firms. In specialty services, it also provides secure receipt of data and data restructuring services.

What sets Highland apart from the competition? "Scientifically precise knowledge of Canada Post products, direct involvement in packaging, technical abilities, and helping clients get a better response rates," Ward summarizes. "Since 1993, we can say categorically that we have saved our clients millions of dollars."

LoyaltyMatch

The first thing one notices upon meeting Brad Ball, president and CEO of Loyalty Match is his location: the futuristic looking Accelerator Centre at the University of Waterloo Research and Technology Park. This multi-tenant facility was constructed in 2006 to

encourage and promote the growth of high-tech firms, while acting as a catalyst for new product and service innovation. The Accelerator Centre provides Ball and other innovators like him with a range of services at below market rental rates, including Intellectual Property management consultation, mentoring, access to professional service providers, community networking events and investor matchmaking opportunities. Tenants also share office and meeting space and administrative services. The Centre's funding is provided by many private and corporate donors, the City of Waterloo, the region, the province, and the Government of Canada.

Ball and other co-founders launched the patent-pending LoyaltyMatch solution in February 2008 with the objective of providing loyalty program members with a marketplace in which to trade or sell rewards such as merchandise, entertainment and leisure attractions, and services for rewards not available within their existing loyalty programs. Members have the option of using the merchandise they gain through successful trades to obtain cash. (LoyaltyMatch can help identify a member on the system who will pay cash for desired items.) People who are not members of any loyalty programs can also shop on the site. Ball

stresses that LoyaltyMatch doesn't permit trading, buying or selling of tickets, points or miles directly. Instead, the marketplace allows for the "earning and burning" of points, miles, and merchandise via trades. As well, service partners can target highly qualified shoppers and member to liquidate their currencies.

Today, the Web site, www.loyaltymatch.com, has attracted 10,000 to 15,000 global members from sixty countries. What's currently online is a beta site but Ball says not to worry, everything is about to come together this fall.

"We have three, key technologies in the pipeline, a plan that we believe is going to launch us to critical mass and the right mix," he explains.

With over 20 years' international experience as a member of senior leadership teams with Hewlett-Packard, Kraft Foods, Gemini Networks (a member of the Galileo/Apollo Global Travel Distribution System) and Open Text, Ball's background is impressive. He earned his MBA from McMaster University.

"We're trying to help consumers use something that at the end of the day is sitting in their virtual wallet that they haven't found a robust way to use. We think we've got a way to do that. Will it work? Time will tell."

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Waterloo Region

Educated workforce:

This area provides residents exceptional access to an array of acclaimed post-secondary education institutions. The University of Waterloo, Wilfrid Laurier University, Conestoga College Institute of Technology and Advanced Learning, and the University of Guelph host 50,000 post-secondary students annually, including 10,000 graduate and 15,000 co-operative education students. Wilfrid Laurier University has one of the largest business schools in Canada and is also renowned for its science and music faculties. The University of Waterloo is home to the largest co-operative education program in the world and has consistently ranked first in its role as the nation's most innovative university. There are 150 Research Centres in the Waterloo Region.

Notable businesses in the region:

Co-operators, Dalsa, Equitable Life Insurance, Open Text Corp., Manulife Financial, Maplesoft, MKS Inc., McNeil Healthcare, R.I.M., Sandvine, Sunlife Financial, Sybase

Growth:

The Waterloo Region is one of Canada's fastest growing communities, expected to reach 729,000 people by 2031. The growth rate of the Region is nearly twice the Canadian average. The median population age is one of the lowest in Canada. In 2006, CTT's Gross Domestic Product (GDP) was worth \$21.5 billion, larger than several Canadian provinces. CTT's workforce grew 14.3% between 2001 and 2006.

A best place to do business:

The Waterloo Region has been ranked as the fourth best place to do business in Canada out of the country's Top 40 list ranking by Canadian Business Magazine. Source: http://www.techtriangle.com/business_advantages

REGIONAL REPORT from page 12

WHAT SERVICES HAVE YOU DEVELOPED
WHICH REFLECT YOUR REGIONAL STATUS?

Anne Marie Heinrichs, AMI Business Solutions:

Small business represents 85 to 90 percent of the economy here and yet there is a recurring serious lack of support for it. In February, we started "Please Take My Card," a networking company serving small businesses in the Region to address this problem, and have begun launching events, which to date, have been very well attended.

DOES YOUR LOCATION ALLOW
YOU TO CONTROL EXPENSES MORE
EFFECTIVELY?

Cam Shapansky, Blue North Strategies: It's a whole lot cheaper to operate a business here. We have great high-tech resources and feeder institutes that provide us with great people. We tend to employ data driven technologists and agency folks.

Randy Litchfield, Inbox Marketer:

There is a lower cost structure here. We own the building our business operates in. In Toronto, that would never be possible and we're in good proximity to Toronto; it's only an hour and a half drive from here.

WHAT IS YOUR COMPANY'S STRATEGY
FOR MARKETING TO YOUR CLIENTS?

Glen Drummond, Quarry Interactive Communications:

Our clients are united by a common factor: the people who buy their products and services tend to need to live with the consequences of their purchase decisions for some time. The buyer manages that risk by working with professional sales people to help fit the right solution to their problem, by checking digital channels for information, or by referring to communities of peers for referencing and doing their homework. That creates a distinctive set of marketing communications challenges, brand position challenges, and customer experience challenges. We have built our practice around helping clients with that particular kind of customer with that

particular kind of buying position. Recently, we were recognized as a Certified Agency Partner by Eloqua. This places us in a select group of agencies worldwide. We have also established "Idea Exchange," (<http://ideaexchange.quarry.com/>) a blog that enables us to share ideas with an opt-in list of approximately 1,000 unique visitors.

Randy Litchfield, Inbox Marketer:

We receive new business via referrals and from our newsletter. As well, Geoff Linton teaches innovative seminars which introduce e-mail marketing and integrated marketing for the Canadian Marketing Association. Also a lot of our work comes to us from virtual e-marketing.

Monica Reid, Emerge2 Digital:

We tend to work with clients who are number two in their marketplace. We focus on their customers' needs and really get into our clients' shoes. We never talk about technology, instead we ask ourselves, "How can we maximize the result?" **DM**

In the August issue, we visit London, Ontario.

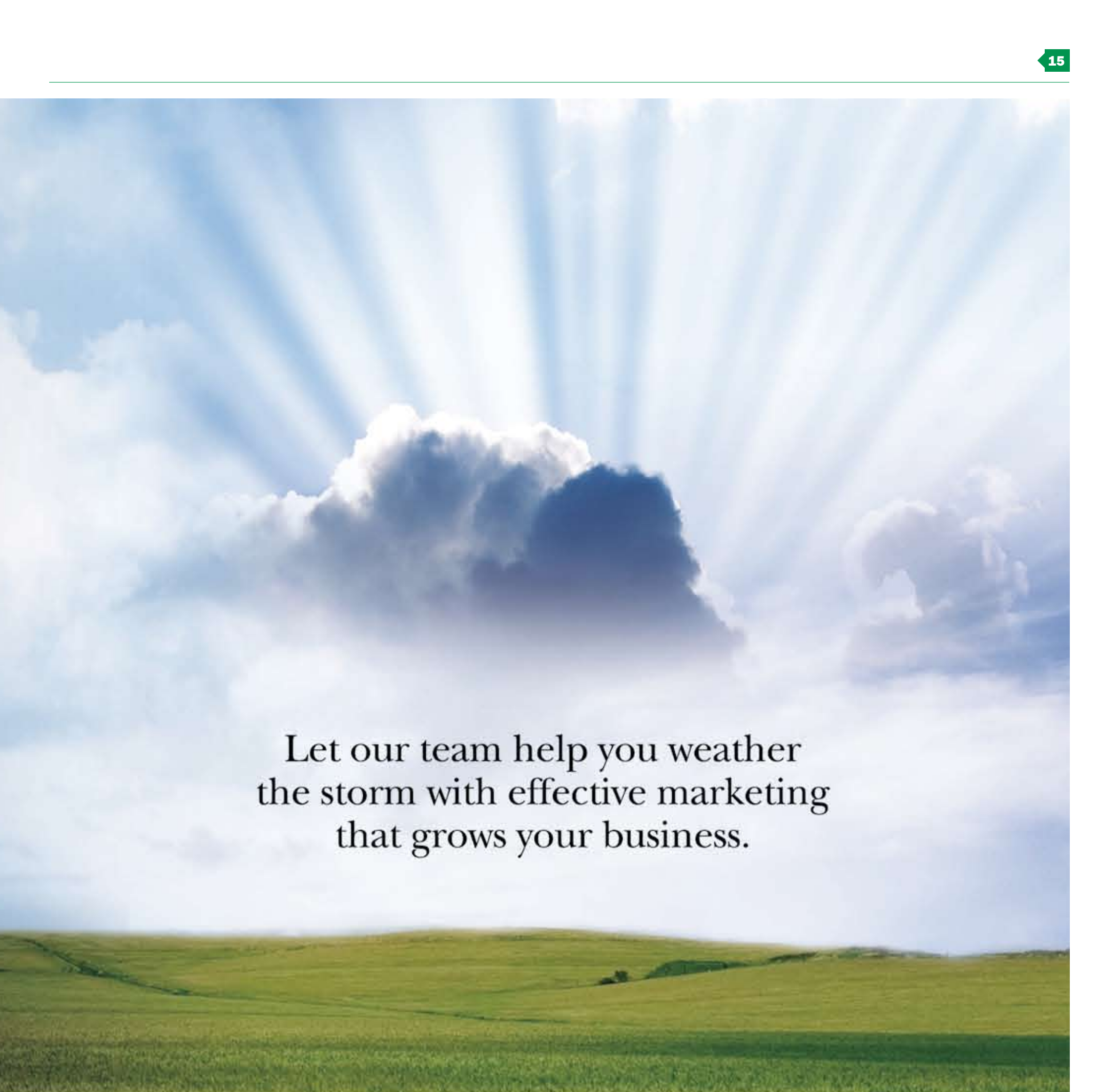
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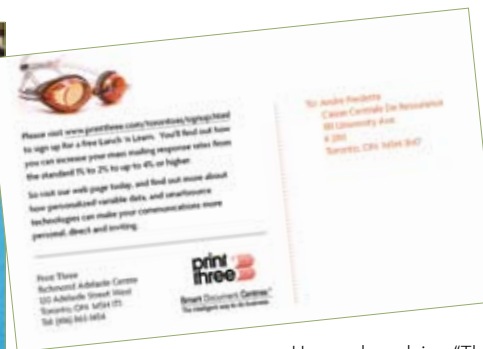
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from: anywhere
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Creating lift in B2B by getting personal

Print Three scores second Gold Frankie Award for integrated DM campaign *By Kalan Vuksanovich*



Client:	Print Three
Campaign:	Get noticed with 1-to-1
Agency:	Eden Advertising & Interactive
Creative Director:	Esther Willinger
Copywriter:	Ian Tuason
Designer:	Rachel Yu
Project Manager:	Olga Mete
Account Executive:	Esther Willinger

In an era of personalization, smart marketers within the printing industry are deploying direct mail to showcase their own one-to-one marketing and production capabilities. A prime example of this phenomenon is Print Three (P3) president Andrew Hrywnak, who has set out to teach corporate clients how to incorporate relevance within their one-to-one communications. "This is something that is important today, and marketing people are listening because they need to achieve a better return on their marketing spend," he explains. Hrywnak is no stranger to this strategy. Last year, P3 won a Gold Frankie Award for its highly successful Lunch & Learn direct mail campaign targeting clients and prospects within the real estate industry. This cross-country campaign repeatedly "packed the room" with successful realtors and real estate executives (and leaders within other vertical market sectors), who were willing to dedicate their lunch hour to learn about getting better response from their marketing and promotions nationally and locally. The series of winning post cards that provoked such high intensity interest were designed by P3's long-term partner Eden Advertising & Interactive of Concord Ontario.

Business focus

Also headquartered in Concord, P3 is a Canadian digital print franchise with 60 Smart Document Centres across the country. From St. John's Newfoundland to Nanaimo BC, the Canadian document processor deals exclusively in the B2B sector, serving clients that range from Fortune 500 companies to small, independently owned businesses. But P3 is more than just a standard professional quality digital printing shop. It helps clients develop and refine databases, obtain and work with lists, develop programming, and construct cross-media campaigns. The company has a production facility that does any and all required offset work for clients. "What's unique about us is that we can cover a wide range of needs for customers from coast to coast in Canada. It's basically a one stop shop," Hrywnak stresses.

Supports integrated marketing and communications

The company's typical clients are VPs of marketing and sales who haven't utilized one-to-one methods extensively. P3 is a full-fledged document processing centre that partners with its corporate clientele—helping to implement supplementary marketing strategies that will deliver the ROI clients want to achieve.

Riding the wave of last year's campaign, Hrywnak approached Esther Willinger,

people can see it's directed at them, and maybe change the image based on what industry it's in," she adds.

In this instance, the goal was to augment this traditional technique with images that can't help but speak directly to marketers. The agency president elaborates: "We've taken it to a whole different level where now, when somebody looks at the piece, it's designed in a way that's so uniquely personalized that the person thinks not only 'This is personalized for me' but also

We've taken it to a whole different level where now, when somebody looks at the piece, it's designed in a way that's so uniquely personalized that the person thinks not only 'This is personalized for me' but also 'Somebody must have taken the time to design it for me'. Esther Willinger

president of Eden Advertising, to design a one-to-one, integrated mail piece that would both demonstrate Print Three's document processing quality and go the extra mile to "wow" clients and prospects with a demonstration of effective personalization. "This one-to-one marketing piece is, first of all, an example of what Print Three can do for its clients but it also demonstrated how effective a one-to-one marketing piece can be," Willinger emphasizes. "One to one has been around now for many years but most people take it to the level of: 'We can personalize it and write their name, make it stand out, write it in different colours so

'Somebody must have taken the time to design it for me.'"

Wow away

Because P3's targets are marketers that deal with an onslaught of niche markets themselves, Andrew and Esther needed to create a generic piece that would demonstrate P3's savvy with one-to-one targeting. Thus, in November 2008, the duo sent a series of four, personalized 8.5" x 5.5" postcards in invitation style envelopes to a national list of approximately 30,000 people. The list, which was a mix of internal and external names, was composed of 40

percent prospects, and 60 percent existing clients.

Hrywnak explains, "The intent is that we will be able to arrange a 'lunch and learn' seminar on the benefits of P3's trackable one-to-one marketing."

These direct mail initiatives help the P3 franchisees market their businesses. Willinger explains, "Each store has its own database of businesses within its area that it wants to target." The pieces are currently mailed out monthly, in four waves. By accessing P3's online portal, each P3 Smart Document Centre can determine the appropriate postcard for every target on its prospect and client list. Thereafter, images for all of the Centres are printed at one time and mailings are sent out nationally from head office.

One of the postcards displays an elevator "up" button, lit up with the recipient's first name personalized directly under the arrow. The text reads "Speak to your customers this directly and there's only one way to go." Another mailer displays an image of a crystal clear resort swimming pool. The recipient sees "Dive in, First Name" spelled out at the bottom of the pool in dark blue pool tiles. The header reads: "Make your direct response this inviting." A third mailer displays the person's first name under a highway sign that reads "Exit here." Finally, there is a postcard with an image of a "walk" sign on the street, personalized again to the recipient. The targets' names must be seamlessly integrated because, as Willinger explains, "if they don't need it right now, you don't want them to throw it in the garbage—you want them to hold onto it because it just has that level of personalization that they would want to keep."

On the back of each postcard, the recipient finds a personalized letter that is theme related to the front image. This text speaks of the response effect of

one-to-one marketing. It also directs the recipient to a URL to sign up for a free lunch and learn seminar. On the back of the elevator piece, the individual is offered a personalized calendar showcasing more cool, variable print technology in exchange for seminar attendance. When the target signs up online, a thank you page immediately pops up.

With the contact information personalized to each individual P3 location, follow up reminder calls and e-mails are made by the stores themselves to people who have registered for the sessions, and other calls are made to encourage late registration for non-responders.

Lunch and learn

The campaign is currently still underway. To date, it has generated a high end response rate of six percent. Obviously, its win of a second Gold Frankie for message clarity speaks to the potency of the postcards. "What we're finding is that every lunch and learn meeting we're going to—when we're able to present this concept—95 percent of the clientele is saying 'We're interested in this, we'd like to give this a try,'" Hrywnak reveals.

Willinger agrees. "This world is almost over advertised. It's becoming harder and harder to get noticed," she notes, adding, "A campaign like this shows not only how unique we as an agency can be in this market but more importantly, it demonstrates to clients, 'I can get a better return on my investment.'" Later this year, the upcoming series of mailers will include a personalized URL for clients to visit, along with more advanced image targeting. **DM**

Kalan Vuksanovich is an Oakville-based freelance journalist. He can be reached at (905) 580-5159 or by e-mail at kvuksano@ryerson.ca. For information on Eden Advertising & Interactive, please visit www.edenadvertising.com.



Are you an obnoxious Big Mouth?

Unless your customer relationships are two-way, you probably are *By Cam Shapansky*

CRM... It's amazing how those three letters said in sequence can cause marketing and finance executives alike to squirm, sweat, and reach for their ulcer pills. Off the top of my head, I can name a long list of organizations that have spent millions of dollars, sometimes tens of millions of dollars, on big CRM initiatives and have seen very little return for that investment.

Why is that? Does it not work? Is it all a big scam?

No. For the most part, the systems can do everything they promise. The problem, from my perspective, is that organizations go out thinking they can buy better, stronger, and stickier client relationships out of a software box.

I think back to when I was eight and in Grade 2 and a new guy called Mick showed up at our school halfway through the year. He wasn't terribly popular. One day, he came in with his dad's antique coin collection and started handing out expensive and rare coins. As eight-year-olds, we didn't think much about it and gratefully accepted the shiny, round coins framed in cardboard and covered in plastic. That night, after Mick and his father had retrieved their rare coins and left our front doorway, my dad sat me on his lap for a "talk" and his words have stayed with me ever since. He said, "Cam, there's a good lesson for you here—you can't buy your friends, you've got to earn them by being nice to them." I wish I could sit all of those ulcer-ridden, pill-popping executives down and give them that very same talk.

When I look back at all the CRM initiatives I've been involved with, the ones that failed were those that were viewed by the organization as a large-scale IT project or purchase. The IT and marketing sciences folks saw CRM implementation as an opportunity to tie databases together, analyze data, cluster, segment, develop models, and gain a whole new level of insight into their clients and behaviours. While this is all great, it's missing the point.

What is perhaps the most fundamental part of a customer relationship? It needs to be *two way*. We've all met obnoxious people who spew forth endlessly about themselves and never pause to ask a question, or listen to what others have to say. Most organizations behave like those obnoxious people. They blast out information with a fire hose from each of their many silos and don't even pause to consider what they are saying to whom.

Here's one example from the many I can think of:

I do almost all of my investing and banking with one bank. I have two of their credit cards among the long list of products I have with them. Last week, I got an offer in the mail from their marketing department suggesting I may be eligible to carry the card I already have with them. Someone was clearly standing on top of their silo with a fire hose spraying out material and wasting a lot of paper in the meantime.

Not listening

I don't want to suggest that sophisticated CRM systems aren't necessary; there are some fantastic products out there. I do, however, want to emphasize that investing heavily in a big, expensive CRM system is not going to solve your problems on its own and it is certainly not the place to start. Organizations need to start with a philosophical shift, a commitment. You need to acknowledge the fact that you just may be acting like the loudmouth friend who doesn't listen.

In making the relationship two-way, you need to acknowledge what you know about your clients, and you know a lot just based on their client information and transactional history. By showing them that you know who they are when you communicate with them, you will be taking a big step in the direction of making your client relationships two-way. There are a lot of convenient excuses not to change—poor data, quality assurance, cost—but further investigation will help you conclude that these are just excuses. Organizations committed to having more meaningful interactions with their clients start with the basics. Before sending out information, they stop and think about what they already know and factor that into each piece of communication. Sure, a sophisticated CRM system will make those interactions even richer, but the first step in getting there is changing the way you think about communicating.

Connecting with every client

Here's a really simple example. One of the challenges that investment advisors face is the basic fact that they cannot maintain effective relationships with every one of their clients. There simply are not enough hours in the day. Advisors want to spend serious time with their top clients and deal as efficiently as possible with their smaller clients.

As an investor, particularly in a stormy economy, the most important piece of information you receive are your quarterly statements that show how your money is doing. We've worked with a number of firms to help use this document to extend the reach of investment advisors. Rather than sending out an unsigned package, these valuable documents can be positioned as insights that come from their advisor. Simple things like adding the advisor's contact information and picture, along with a brief note, reminds clients that they have a relationship with a person in the organization. Since the data that generates the performance report includes a comprehensive overview of the client's investments, we can even add insightful and relevant commentary, again positioned from the advisor, that demonstrates that each client's assets are being watched and there is a person they can contact if they feel the need.

Investment advisors are all of a sudden connecting with every one of their clients without consuming any of their own time. Clients who are not regularly contacted feel like their advisor has reached out to

them and offered help or communication if they want it.

A simple step like this does not require new systems, but it does require looking at each communication touch point differently. Rather than ignoring the quarterly statement because it is complicated and not a traditional marketing tool, you need to pause, think about the recipient, and turn that piece into a natural part of the larger relationship.

Once you've got yourself thinking about what you are saying, and you are sensitive to the needs of the recipient, you will be in the position to take full advantage of the power and functionality of your fancy, new CRM system.

Start with the basics. Make sure you're not an annoying Big Mouth.

Cam Shapansky is a partner and consultant at Blue North Strategies Inc., where he is a developer and proponent of White Page Marketing™. For more about White Page Marketing™ and Blue North, go to www.bluenorth.ca.



Campaign Management tools, Part 2: How to select the right solution

Document your current process and future requirements and be prepared to weigh the importance of each requirement *By Tim Fewster*

In Part 1 of this series, we reviewed the key building blocks to put in place before considering investing in a campaign management tool. With those items now in place, your next step is to determine the functionality you need and then start considering different solutions.

The goal of this article is to help you identify the requisite core functionality and support to ensure you select the right campaign management tool. The answers to these key questions can form the basis of an RFP for selecting one.

Campaign process

As we mentioned in our previous article, a key requirement for selecting a campaign management solution is to document your current campaign execution process. This document should outline all the execution steps required in your campaigns, all of the touch points across your organization, stakeholders involved in the process, and key decision points.

With this document in place, everyone involved in the campaign tool selection process will have a complete understanding of the steps required for your organization to execute a marketing program.

Remember that you will likely have a selection team with members from IT, Finance and Procurement and these folks do not have the background to understand the process. This insures that nothing will be missed and avoids the difficult situation of having additional functionality requirements come to the surface once a solution has been selected. Outlining this process within the RFP can be helpful to the vendors to insure they understand your process and be confident their solution can meet your requirements. It also gives them the opportunity to highlight ways their solution can streamline your process.

Single or multiple channels?

One of the most important decisions you will make is to determine what channels the campaign management solution must support.

Will it only need to support your direct mail acquisition efforts or your e-mail communications to existing customers? Or, do you require a sophisticated multi-channel solution to support direct mail, e-mail, telemarketing, as well as driving leads to your company's sales force through a third-party CRM tool?

If your current and future needs are focused on a single channel, your selection process will be much easier. There are many cost-effective solutions that focus solely on a single channel. As well, many of the larger multi-channel campaign management vendors provide the option of licensing a scaled back version of their platform for the channel you are interested in. In this situation, these single-channel tools will provide a significant amount of predefined functionality such as campaign templates and standard reporting specific to that channel. These tools may also have established back-end data systems that will tie seamlessly into your customer/prospect data. These advantages will provide a much faster ramp up time from initial installation to campaign execution roll out.

Be prepared to roll up your sleeves if you require a multi-channel solution. As previously mentioned, many of the multi-channel tools got their start by focusing on a single channel. Due to market pressure and the goal of gaining more market share, these tools have broadened their product suite to incorporate additional channels — either through investments in further development or by acquiring competitors and integrating and incorporating their solutions into the offering.

The top platforms such as Unica, Alterian, Aprimo, SAS and Infor (Epiphany) all lead the marketplace in one or more channels/service offerings but not one of these tools leads in all categories. What this means is that for a multi-channel solution, you will likely find yourself making tradeoffs based on the functionality that is most important to you.

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PGePROPEL creates integrated customer relationship solutions. "Cool," you say. "But what does that really mean?"

It means we can help you establish long-term, profitable customer relationships. And who doesn't want more of those?

It also means that not only can we help you with strategy, we can translate it into great creative with tactics that work. We actually know how to execute. Weird, eh?

It means we assembled smart, senior marketing strategists, creative geniuses (genii?), interactive developer types, processes gurus, market segmentation brainiacs, print production whizzes, project managers and a few strategic print procurement wonks.

Creating this eclectic mix of talent was a gamble. We ran the risk of accomplishing little more than putting the fun back in dysfunctional. On the other hand, we could create the kind of alchemy that turns sows' ears into Louis Vuitton. The PGePROPEL team is, happily, firmly held in that other hand.

From online promotions to DM, from list sourcing to predictive modeling to data cubes, from collateral to branded content, from print sourcing and project management to environmental optimization, our smart, insightful people create solutions that deliver meaningful returns on your marketing investment. Many happy returns!

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Contact Andrew Gage at 905 940-0200 x148

Markham Office
500 Cochrane Dr., Suite 5
Markham, ON L3R 8E2

Toronto Office
89 Bloor St. West., Suite 202
Toronto, ON M5S 1M1



A prescription for David Caplan

How eHealth could benefit from a good Customer Relationship Management program and the technology to support it *By Emma Warrillow*

I was sitting in my doctor's office this morning and saw a sign entitled "Info for Parents" that rather surprised me. The sign said "Every time your child gets immunized, you need to call Toronto Public Health to update your child's immunization records... if you don't call, your child could be given a suspension letter from school." My children can be kicked out of school if I don't phone public health every time they get a vaccination?! Perhaps even more concerning is that self reported data is enough to get my child off the detention list!

How can it be possible that we have to call to update our records when the healthcare provider must have the correct information in order to get paid for providing the service? It seems obvious that the right hand doesn't know what the left hand is doing in healthcare in Ontario. Our healthcare data is obviously stored in different silos rather than in one central repository. Sound familiar, anyone?

I am certainly *not* intending to wade into the recent eHealth scandal, but it occurred to me (perhaps because I was trying to decide on a subject for my article) how analogous this is to a company without a good Customer Relationship Management program and the technology to support it. Perhaps the Health Minister should take a page from the CRM book as he tries to move this initiative forward.

The picture of health

On the surface, Ontario Health appears to have it all.

Most of my clients would be thrilled to have (as with the Ontario Health Card) a reliable common identifier and a loyalty card that must be shown at every touch point. eHealth also has executive buy-in and approved funding (at least until the next election). And, from what I read, it also has well-paid (and fed) consultants experienced at this type of implementation to guide it through the process.

However, the current "loyalty program" that requires reporting your "purchases" is like collecting food stamps to be redeemed for free merchandise; it seems archaic when a loyalty card—and a method of "capture" for the information—exists. Electronic capture of the healthcare number at every touch point (doctors, hospitals, labs and possibly even pharmacies) and the consolidation of this information into one database would enable the creation of a 360-degree view of the patient.

Complete patient profiles could help practitioners understand all of a patient

history, not only that from their own interactions. Patients frequently skip information unintentionally because they forget or view it as unrelated. A clear understanding could provide the doctor with all the information at their fingertips. This is particularly relevant as patients often interact with the system in a variety of ways. "Convenience channels," like walk-in clinics, may mean primary care records are incomplete.

For example, knowing that someone visits multiple doctors to get Oxycontin prescriptions could help identify and get treatment for addictions sooner. Missed information can mean incorrect or late diagnoses, resulting in significant costs to the system in both human and monetary terms. While analogous, the importance of missed sales opportunities or inaccurate offer targeting in other industries pales in comparison.

Identifying efficiencies

CRM initiatives typically include a customer profitability component. Patient profitability may sound like an uncomfortable concept, but the database will help to better illuminate the cost equation. Certain practices may be identified that are costing the system—this could lead to patient education or user fees. One frequently cited example is the trip to the walk-in one night, and a follow-up with the family doctor "because we don't trust the clinic," the next day. Practitioner and patient abuses might be identified or testing protocols changed. Healthcare is a massive cost to the taxpayer and efficiencies benefit everyone.

The data collected by the system could be leveraged through data mining to help eHealth identify adverse drug reactions, relationships between ailments, and common patterns of treatment. Data mining could identify patterns of disease and help to pinpoint environmental relationships or under served areas. This technology has long been used by drug companies in controlled studies, but this would provide the opportunity for impartial wide-ranging analysis.

Data mining could also help identify fraudulent activity—just as it is used by our friends in the credit card world. Surely it would be worth investigating cases where a five-year-old appears to have been prescribed Viagra or a woman has a baby after her hysterectomy! This is not a small problem: Last December, the auditor general estimated that there are some 300,000 more healthcare cards in circulation than people.

Of course, like customer data, patient records will require significant privacy protection. The subjects of data security and governance are not ones that eHealth can afford to take lightly. Due to the sensitivity of this information, the public is understandably concerned that it will get into the wrong hands. The fear is that it will be used to ostracise AIDS patients or those suffering with mental health issues, or that insurers and employers will gain access and use it to deny coverage or jobs.

It sounds like David Caplan and eHealth are really treading on, what is for many of us, some pretty familiar ground. Although the transition won't be easy and it will require careful planning and hard work, done right and with significant controls on the system, the consolidated data source accessible across the healthcare profession could provide enormous benefits.

Ironically, during today's visit, my doctor proudly showed me the practice's new electronic system to track information in the office. No more bulging paper files and scribbled notes to flip through...perhaps there is hope for the profession yet! **DM**

Emma Warrillow runs Emma Warrillow & Associates Inc. (www.emmawarrillow.com) a consultancy that enables companies to implement their database and analytic strategies (including CRM) and make the most of their customer data. She can be reached at emma@emmawarrillow.com

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Event/trigger based campaigns

All campaign management solutions allow users to create ad hoc campaigns. This involves a user defining the customer/prospect that they want to contact, applying required suppressions, assigning campaign cells and extracting the contact list for the direct mail shop or call center. Most tools also provide a module to create event or trigger based campaigns. You need to determine if this type of functionality is required for your marketing communications.

Event/trigger based campaigns are similar to ad hoc campaigns with two key differences. The first is that the selection criteria for who will be included in the campaign are based on a “change” in the customer/prospects profile. This change is referred to as the event or trigger. The second difference is that the outbound communication is executed automatically (without any human intervention if possible) on a specified frequency. A common trigger based campaign is to check for new customers/prospects that have been added to your database (the event) and automatically send them a welcome e-mail message (automatic communication).

The key value of this type of campaign is that it allows you to react very quickly to marketing opportunities that surface within your customer base. Examples include recommending a new product or service when a customer’s profile has changed or sending a retention message at the first sign a customer’s loyalty is weakening.

Data sources

In our last article, we reviewed the importance of the role that data plays in a campaign management solution. You need to be able to compile the data that is required to execute and measure your marketing campaigns. This includes full contact information, campaign selection

criteria such as purchase history and the data required for privacy, such as do not contact lists and suppression lists.

If you have all the required data for your customers/prospects in a single system, you’re in good shape. The campaign management system you select needs to tie into that system and you need to let potential vendors know the makeup of that system. In cases where your data is not readily available or if you are implementing a sophisticated multi-channel solution that requires data from several systems, you have some

There is a great deal of effort required to deploy a campaign management system within your marketing organization... Before proceeding, you need to understand the ability, availability, training requirements and internal costs for your internal IT staff to deploy the solution.

decisions to make. The first option is to develop a customer/prospect database system internally that brings together the required data. To do this, you need to have the technical and business skill internally to develop the system yourself. The internal IT staff that supports the marketing department will likely indicate that it has the ability to develop such a system. This may be true from a technical perspective but most IT groups do not have the marketing experience to develop a system that meets the needs of the marketing department. If you are choosing this route, select a vendor that can support the data requirements of your industry and recommend database designs for your requirements.

The second option is for the campaign management system vendor to develop the database system. While most vendors

cannot do this work themselves, they have a number of value-added partners that can develop and install the system for you.

Analytics

Some campaign management tools include analytical tools that can be used to drive your marketing efforts. This implies developing predictive models to identify customers most likely to respond to a cross-sell or up-sell offer as well as segmentation tools that allow you to group similar customers based on their purchase behaviour. You need to determine if this functionality is required before

selecting a tool.

One advantage to this kind of solution is that your analysis can leverage the detailed contact and response history maintained within the campaign management system. However, many organizations have internal analytical teams that are already using tools such as SAS or SPSS to meet their analytical needs. Analysts are trained in these systems and have invested in analytical processes and standard code. If you already have a separate analytical toolset in place, you need to ensure the campaign management tool you select can accept output from your analytical tool to embed model scores and segment assignments into the data.

Reporting

The current array of campaign management offerings provides a wide

range of reporting functionality. This includes everything from sophisticated performance management, dashboard, and custom reporting solutions that can be used to develop rich business intelligence on your customer base and measure the impact of your marketing programs. Other tools offer very basic reporting to provide counts and campaign response rates in formats that are not presentation quality.

In the end, your reporting requirements from this tool equate to the level of sophistication of your user base, along with your current reporting capabilities. Our experience has shown that most marketing personnel are too busy to take the time to use a sophisticated reporting tool to identify marketing opportunities and view campaign results. In such cases, a simple reporting solution that allows power users to extract raw numbers that can be included in other formats such as PowerPoint, is what is actually needed.

Level of support

There is a great deal of effort required to deploy a campaign management system within your marketing organization. Most solutions require a separate hardware installation that must tie into your internal IT infrastructure to deliver the solution to the users' desktops. Combine this with installing a sophisticated software package as well as integrating many data sources, and it can become quite a daunting task. Before proceeding, you need to understand the ability, availability, training requirements and internal costs for your internal IT staff to deploy the solution.

Most of the principal campaign system vendors can provide a network of system integrator partners that can help you with the installation. There will be a cost to do this, however, the system integrator will be able to perform the installation much more quickly than your own IT staff. Integrators have experience with the tool to help avoid common pitfalls and they can help train your own IT staff through

the process. Another consideration is the ongoing support required to manage the system moving forward – in particular the underlying data. Depending on the cleanliness and accessibility of your data, you may require a significant amount of work to compile the data needed to drive the system, especially within a solution based on external prospect data. If you do not have the staff available to manage this process, another option is to identify a campaign management vendor that provides a hosting solution. In this scenario, a third-party partner of the vendor can manage the system on your behalf, providing your staff access to the system through a Web interface.

Identifying the help you need to implement and maintain a campaign management solution is key. You need to understand from the different vendors what is required to run their solution moving forward and determine the best way to meet these requirements.

The deployment of a campaign management tool within your marketing organization can significantly improve your campaign execution, provide campaign tracking, and help you respond more quickly to marketing opportunities. The key to selecting the right tool is to document your current process and future requirements and be prepared to weigh the importance of each requirement as the existing solutions may not provide everything you need. To ensure the deployment of the solution is successful, make sure your IT department can support both the installation and ongoing maintenance of the system. **DM**

Tim Fewster is VP, Database Solutions for CVM Marketing Inc., a consulting practice that focuses on the art and science of identifying which customers represent the greatest potential value to your organization and then helping to realize that potential. He can be reached at (416) 572-7680 or tim.fewster@cvmmkt.com.

Enabling a 360-degree view of your customer

Improve your MDM strategy to reduce costs, increase sales, promote marketing effectiveness *By Bernard Drost*

As companies across the board struggle with the impact the economic downturn has had on their bottom lines, some forward-thinking organizations are focusing on how to better define and manage customer data through Master Data Management (MDM). Decision makers at these companies know that even modest improvements to their MDM strategy can make a big difference in enhancing overall data quality. Improved data quality can then lead to increased business efficiency and sales and marketing effectiveness, lower customer management costs and ultimately, improve customer service and satisfaction. In fact, successfully defining and managing customer data is fundamental to the success of any program that relies on it – especially during an economic downturn, when organizations must do more with existing resources.

Apples to oranges

There are a couple of significant challenges

that companies commonly confront when developing a plan for MDM. One is that various divisions within an organization have their own definitions of a customer and their own customer hierarchy, and each division requires different types of customer information.

Another challenge is that many organizations spend insufficient time distilling their data requirements before defining their customer data model, and then do not sufficiently cleanse existing data or prioritize ongoing data quality. This can lead to complex data models, increased costs, and eventually, customer dissatisfaction, decreased efficiency in sales, marketing, service, and IT.

Assessing the situation

To address these costly situations and better utilize their customer data, companies need to develop an understanding of the customer data life cycle and how different parts of the organization use customer data. There

must be consensus across the organization as to how customer data will be modeled. The correct technology (as well as gaps between business needs and available technology) must be identified. Defining who owns, manages, and can modify customer data is also critical. Finally, a plan must be developed to ensure ongoing data quality.

Once this assessment has been completed, companies should adopt a phased approach to improving their customer data management and modeling, as well as enhancing the enabling technology. This will help simplify their customer data model, enhance their customer view via third-party data feeds, reduce IT costs, improve customer segmentation and sales efficiency, and maintain a single, complete view of every customer. As a result, users across different divisions will be talking about the same customer and can link all relevant company-wide activity correctly to this customer.

Example

We recently worked with a global high-technology company that wanted to improve the quality and reliability of its customer data. This firm needed to increase the efficiency of its sales force during a hiring freeze, pro-actively track lucrative support contract renewals, increase levels of customer satisfaction and ultimately, maintain a single, 360-degree view of each customer. We realized that while the company’s sales and service departments had different needs, the majority of their requirements overlapped and could be achieved by a single CRM system – provided that customer data was properly modeled

from the start. It also became clear that by spending time creating a more refined customer data model that minimized exceptions, the company could simplify many business practices, streamline the existing infrastructure and reduce long-term costs.

Using a phased approach, we were able to help this company identify how different business groups use customer data and then determine and build consensus around how customer data should be defined and owned – and who could



Bernard Drost

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Variable Data Print: It's a numbers game

To maximize digital print's value and the potential for greater direct mail open rates, we must embrace media rich imagery but how do we manage all that data? *By Felix Gill*

Much has been written about the increased response rates that can be gained from using sophisticated digital print marketing. While this is certainly true and the technology continues to advance at a blistering pace, digital marketers are still not fulfilling the amazing potential of personalization. Why? Because until they come to grips with digital print's inherent technology restrictions, marketers will continue opting for the safe bet of unimaginative direct mail marketing.

For example, if you wanted to create a print run of 250,000 nicely Photoshopped, unique flyers, you would be trying to process more data than the average digital press is designed to handle. But to maximize digital print's value, we must not shy away from media rich, striking imagery — even if we are scared of extended print runs. Instead, as strategic marketers, we must learn to *manage* this modern, “on demand” printing capability.

Your name here

Most people have received a personalized, overprinted letter drop through the mail with, “Dear Your Name,” printed on it. While this is better than saying “Dear Occupant,” it is an uninspired method of trying to catch your attention using personalization. For the Facebook and YouTube generation, we must try harder than that. Companies such as XMpie and Kodak's Darwin have created applications that allow personalized marketing to inject more “oomph” by providing impressive, eye-catching images: names drawn in the sand of some idyllic beach or painted in the clouds by the airstream of a private jet. These are the kinds of images that make someone pick up the envelope, look more closely at it and (dare we hope?) open it. In direct mail marketing, it just doesn't get any better than this. Overprinted, text



based personalization is fine and anyone who has tried being adventurous with this type of direct mail can attest to seeing improvement. Yet, the enormous potential posed by fully utilizing digital print is just too big to opt for the simpler choice.

Message in a bottle

The thing is, modern digital presses process text in a different manner than that which they use for images: It is a simpler production process to overprint, “Dear Your Name,” than a Photoshopped wine bottle that appears to have your name forged into the glass.

The easy route is often chosen because of the number crunching involved. Five

thousand unique envelopes utilizing sandy beach images ripped through Photoshop and then re-ripped on a digital press server is time-consuming to produce. If I need to image a sheet of paper in this way to the capability of a high digital production press such as the Kodak Nexpress, I would be looking at an 80 megabyte file. Printing both sides would lead to a 160 megabyte one. This is even before it becomes a press ready file. So just to keep up with the press, data must be fed at the rate of 200 gigabytes an hour. If we played around with our calculators, we would quickly see that a direct mail run of one million, unique, US letter-size flyers, would require a mammoth amount of number crunching.

Never mind that, the digital proofing cycle does not fit into the major mailers' production regimes. It is these markets that need to shift their thinking en masse to more imaginative personalization.

Other considerations

There is an economic question related to personalized printing that, given what we now know about the plausibility of processing large volumes of data, could prove difficult to reconcile. Even if you owned half a dozen digital presses that could deal with the volumes—a comparative costly proposition compared to investing that capital in offset presses—you would still need to get the creative designs generated from a flawlessly compiled database and a radically different proofing cycle compared to that which is used when each print is identical. All of this takes time.

Much of the existing software in the marketplace operates as a plug-in to more mainstream applications such as Adobe Acrobat, InDesign and of course, Photoshop. This keeps the added value of the software company intact while piggy-backing years of tried and tested experience with industry standard design software. This model is a tough one to fit for major mailers. Imagine opening an 80 megabyte file in Photoshop, making a quick change, and then saving it with a unique name. Then, place this unique sandy beach image, for example, into Quark or InDesign and run it to the press, wait to process and repeat one million times. This is tricky stuff—not only to manage but to do without error and still deliver on time.

Data management

To manage a campaign of striking, variable

images that are suitable for major mailer volumes requires a level of strategy and data crunching competence that is thin on the ground in traditional print circles. Designs, press time, and production cycles can be managed and streamlined to get greater benefit from what modern technology can offer. Personalized print campaigns still have many challenges to overcome so as to enter the mainstream successfully. I am sure that there are many cutting-edge print companies with highly developed solutions to mitigate a lot of issues that will arise.

Working closely with creative agencies to better establish and realize expectations can go a long way to making quality personalized imaging more mainstream. Renegotiating production schedules with major mailers who are set in their ways through many years of traditional bulk mailing, is probably the biggest sticking point in achieving these goals. None of these things are impossible — all are critical aspects of achieving the objectives for personalized direct mail. The digital world is first and foremost a numbers game that has slowed the development of any feasible benefit derived from modern imaging technology, as anyone who has waited to download a movie on a slow connection will tell you. To imagine that digital print can somehow work outside these physical parameters just doesn't add up. **DM**

Felix Gill is the CEO of Assetprint®, Montreal, a firm that provides cutting-edge personalized printing, digital print and fulfillment services. Grab and retain your customers' attention to greatly improve conversion. Visit www.assetprint.ca or telephone 1-866-PRINT-38 for more information.

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make changes to it. In addition, we worked with the company to cleanse its existing data and consolidate duplicate records, link all child records correctly, integrate

improved its account coordination at both the national and regional levels and has gained a more in-depth understanding of its customers. Because of its refined

Simply put, improving customer data modeling and effective MDM business processes enable a 360-degree view of customers. Reduced data management costs, increased sales and marketing effectiveness, superior sales forecast accuracy, and enhanced opportunities for cross- and up- selling are all beneficial byproducts. Companies will also find that this valuable effort provides a solid foundation upon which to support customer data-centric projects— both today, during difficult economic times—and tomorrow, when the economy rebounds. **DM**

Bernard Drost is the chief technology officer at Innoveer Solutions, a CRM consulting firm with offices throughout the US, Western Europe and in New Mumbai, India. For more information, contact him at bdrost@innoveer.com or (617) 834-1886 or visit www.innoveer.com.

... successfully defining and managing customer data is fundamental to the success of any program that relies on it — especially during an economic downturn, when organizations must do more with existing resources.

third-party customer data feeds and then train a new data quality group that was dedicated to distilling sales data into business intelligence.

Since implementing this new customer data model and the MDM business process changes, the company has

MDM strategy — and resulting improved data quality levels — the company is also able to more quickly identify and sell to decision makers, generate more accurate sales projections and rapidly solve customer problems to ensure high levels of customer satisfaction and loyalty.



UNLOCK YOUR DATA

by Rick Brough

Taking a planned approach to database marketing: Part 1

Only by integrating your company's marketing efforts can you create a consolidated, actionable view of the customer base with good tracking and ROI measurement

The marketing world now fully acknowledges the benefits of relevant and personalized communications. The better an organization is able to achieve this goal, the greater the return on its marketing investment as measured by response rates, sales, profitability, customer acquisition and retention, and overall customer satisfaction.

Yet, even with such great deliverables, many organizations fail to achieve their objectives—or worse yet—even come close to them. There are several reasons for this underachievement in a more complex marketing environment that includes:

- Larger amounts of customer data
- Information housed in unconnected silos across the organization
- No strategic approach to uncovering analytical insights about customers' needs/wants/preferences that can drive relevant communications
- New marketing channels that require more customized communications
- Lack of process and technology to automate marketing activities

The unfortunate result is that many companies are trying to function with critical customer information scattered across various groups, teams and systems. Integrating the company's marketing efforts to create a consolidated, actionable view of the customer base with good tracking and ROI measurement thus becomes virtually impossible.

The solution lies in learning to combine the core elements of the database marketing continuum—data intelligence, business intelligence, customer intelligence and marketing intelligence—and then automating the entire database marketing process. This integrated approach, powered by experienced resources with the right technology and sound database marketing practices, can significantly improve results on several levels for companies that feel a growing need to improve speed, productivity, metrics, accountability and control, and compliance.

The purpose of this five-part series is to demystify database marketing. This overview will help marketers create a practical, achievable strategic plan to more effectively leverage the data found within their organizations now and utilize easily accessible tools and services. We'll start the process in this article by defining the database marketing continuum and its four key components.

Data intelligence

Data is the foundation for database marketing, and the more complete and accurate the data the better. We all know the expression, "Garbage In, Garbage Out," and it definitely still applies. A consolidated marketing database with all customer contact information, demographics, product purchases, service calls, Web traffic, campaign history, response rates, and any other customer point-of-contact details, is essential.

But in most organizations, this data is spread across multiple functional departments. Furthermore, data entry is often done manually and contact information might not be dependable. Data intelligence is about consolidating the customer information from the various department silos and performing essential data hygiene processes like identifying common customers and households, outlier detection, address accuracy and NCOA (National Change of Address).

Business intelligence

With a data mart in place, you can generate reports that provide insights into performance management. Key Performance Indicator (KPI) reports provide key business and marketing metrics that can be trended over time. You can then profile different groups of customers and compare them so as to quantify and understand unique characteristics of each group. Individual campaigns and cells within campaigns can be analyzed to report response rates and ROI.

Customer intelligence

With customers bombarded by thousands of messages in a single day, the only effective way to break through the clutter is by providing relevant messaging that the customer wants to receive. Customer intelligence is all about gaining individual customer insights that truly enable the delivery of "Right Message, Right Channel, Right Time."

You can only accomplish this by taking a strategic approach to understanding your customers rather than a last minute, ad-hoc pre-campaign analysis. Building customer intelligence is a process that starts with understanding the value of each customer.

The next phase is to segment customers into relatively homogeneous groups that have relevance to your products and services. Typically, there will be multiple segmentations

that provide insights into the multi-dimensional nature of most people. There might be life stage segments, relationship life cycle segments, product needs segments or potential value segments.

You then add predictive analytics to provide a more quantified likelihood to purchase and potential value for each customer for each product. Approaching customer intelligence with this strategic approach, in what we call the *Customer Profitability Optimization Model*, provides the framework for ensuring effective, efficient and consistent communications to each customer.

Marketing intelligence

Campaign Management (CM) applications are now much more than simple interfaces for list processing and identifying target segments for your campaigns. CM now provides the capabilities to manage multi-channel, multi-wave campaigns and develop multi-step interactive dialogues with customers. CM also delivers campaign planning and performance measurement functionality.

Marketing Resource Management (MRM) applications automate the process of getting marketing work done. When implemented correctly, MRM can greatly reduce the manual process of planning through multiple spreadsheets. It substantially reduces the need for time-consuming status updates and review meetings typically required through the campaign implementation process. You can focus your resources on strategic marketing rather than managing manual processes.

Three broad areas comprise MRM:

- Production management, including a marketing calendar for managing activities and a workflow manager for managing individual tasks within each activity
- Asset management for controlling the physical and digital assets
- Financial management and planning for budget control and forecasting

Does your anxiety still linger?

Don't worry. You'll see as we delve deeper into each component of the database marketing continuum that the whole process is not only manageable, you are likely already employing the elements at some level now. In fact, that is part of the secret to achieving

personalized, highly relevant customer communications. Start where you are at and continue to add levels of sophistication to each phase. Then you'll get the synergistic value (aka the big payoff) by putting all the components together and introducing automation throughout. Check the next issue to learn how to get data intelligence

working hard for you. **DM**

Rick Brough is director, Product and Service Development for Transcontinental Database Marketing, (www.transcontinental-dbm.com), which offers a full range of database marketing services—from strategic guidance to tactical execution. If you would like to learn more, you can e-mail him at rick.brough@transcontinental.ca.

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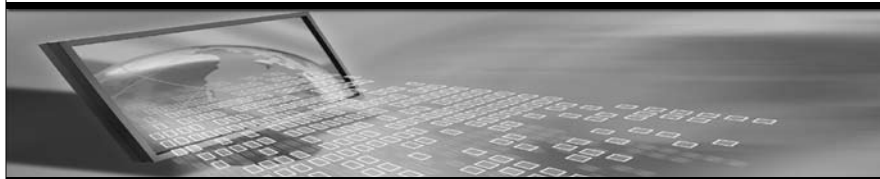
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Text messaging service helps Realtors provide 24-7 customer service *By Brian Perry*

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Fast forward to 2009 and there is a new wave upon us, albeit this time the complementary hardware has been invented and is already here. It is a daily part of our lives and each day we see new and exciting things we can do with this “technology”. Yes, you guessed it, the mobile phone.

The mobile phone has taken the world by storm and although similar to how the Internet and home computers grabbed our attention 20 years ago, the mobile phone is so much more. First of all, three billion of the planet’s 6.7 billion inhabitants carry one of these around with them at all times. Nothing can even come close to the power and personal relationship we have with it.

So how can Realtors and the challenging property market benefit from the emergence of this mobile phenomenon? First of all, let’s ask the question: “What do Realtors really want?” Simply stated, “More commissions!” How do you get more commissions? You need more of either

Text Messages without a data plan and this is the primary service and delivery method of Txt2Look.

So it doesn’t take much to see that any buyer driving around looking at houses to buy will immediately recognize the convenience and sheer value of this service (which by the way, is free for buyers to use). Sellers also love the idea because it is another way to promote and showcase their home when buyers act on impulse when driving by.

The real question here is whether or not Realtors see the value in this service? For those that recognize that “texting” is not just for kids anymore and today’s buyers demand immediacy, absolutely. Txt2Look is currently being used by Realtors from every major brand and in every province across Canada and most start seeing results right away. Here, however, is the key to why this service really works and why there is such an exciting opportunity for Realtors using the Txt2Look platform, it generates leads. Every time a buyer sends a text requesting information on a property, their mobile phone number is captured

sellers with listings or buyers. So how can you get more buyers and sellers? Enter Txt2Look.

Txt2Look (www.Txt2Look.com) provides a text message service that allows Realtors to add sign riders to their property listings and each of these has a unique code specific to that listing. For example, a buyer who is out driving around a neighborhood looking at houses, sees a sign rider on a For Sale sign that says Text “homeinfo” to 25665. Instantly, they receive property information on their mobile phone giving them what a Realtor chooses to provide them on that listing. This would normally include such things as price, bedrooms, bathrooms, square footage, etc. and of course, the Realtor’s name and contact info. The Txt2Look service also provides potential buyers with a link to view pictures of the property, as long as the person’s phone sending the text can access the Internet. (It is important to note that not all mobile phones can access the Internet without a special data plan). The good news, however, is that 100 percent of mobile phones in Canada can access SMS/

by the service. Realtors are notified in real time of interest in specific properties and depending on the level of interest a buyer has at that initial time, the system automates a notification response.

Text messaging for real estate is proven. It has been successfully used in the UK, Europe, Asia and the US now for a few years. Canada has finally caught up with the rest of the world. The service truly does provide a win (buyer)/win(seller)/win(Realtor) solution and with an average cost per property of only \$10 per month, it isn’t hard to see why successful Realtors are signing up all over Canada. **DM**

For more information, contact Txt2Look at 1.888.318.5105 or online at www.Txt2Look.com.

Using voice to generate leads and measure marketing effectiveness

There are so many e-ways to communicate these days but companies should not sell short the power of the human voice *By Rob Nevin*

Faced with local, national, and global economic hiccups, many companies are using electronic channels to cut marketing costs—even as they work to retain their existing customer base. There is nothing wrong, and a lot right, with building self-service Web sites and communicating with clients through various e-channels. However, before companies can work to retain customers, they have to find them. That means companies still have to advertise and promote their goods and services and respond to inquiries from prospects.

With companies cutting back in almost all areas, accurately measuring the effectiveness of marketing promotions is paramount if a company wants to jettison channels that are not driving sales and invest more in channels that are effective. That can be difficult to do when prospects come at you from all e-directions. However, if a company does not offer prospects multiple ways to ask questions and communicate, it risks losing them.

Most prospects want to read about a vendor's products or services online before they decide to do business with the company, so it makes sense to build fabulous Web sites, run pay per click ads on Google and other Web sites, blog about industry trends, and build the corporate profile using various social media outlets. However, unless you are selling a modestly priced consumer product, most prospects will still want to talk to a company representative before they make a purchase decision—no matter how many times and how many

ways they read about you. It can be difficult to talk to prospects when you have fewer sales staff to answer calls or sales staff are primarily focused on retention.

Handling prospects effectively

If prospects' calls are not answered, or if they are shunted to general voice mail, potential customers could turn to your competition. With that in mind, companies

marketing channels and answer all calls would be money well spent.

Picture a company running ads in several trade magazines, on the Web, and using direct mail. After prospects read the ads and visit the company Web site, they make the call. If some of the promotions generate a larger volume of calls than staff can handle, sales staff are tied up with outbound retention calls, or calls come in after hours, prospects may

hours or hire temporary staff (and install more phone lines) when it starts a new promotion. It can use a call centre or try to drive calls to a specific sales voice mail box. Staff, phone lines, and call centres can be expensive. The question is: will the return on investment be worth it? A sales voice mail box does not help a company evaluate marketing and might be overwhelmed—leaving callers with busy signals. But all of these options are better than not taking the call, as long as the return on investment is there.

Voice landing pages

Some companies have married voice messaging technology and hosted voice technology to create what are being described as voice landing pages. Just as ads on Google and other Web sites drive traffic to Web site landing pages, where prospects can read more about advertised products or services, direct marketing promotions can drive callers to a voice landing page where prospects can hear a carefully-crafted message about the advertised product before being asked to leave a detailed voice message, including the best day and time for an agent to callback.

People forget about how the phone can be used to close the sale, or they only think of it in terms of outbound calling. However, campaign specific inbound call handling can greatly enhance marketing campaigns. Think of a voice landing page as a sales voice mail box on steroids. Because voice landing pages are hosted, rather than using on-site telecom equipment, they have virtually unlimited

capacity and there are no associated capital costs.

When it comes to implementing voice landing pages, some companies let staff handle as many incoming calls as possible and drive overflow and after hours calls to the voice landing page. However, other companies drive traffic directly to the voice landing page from ads and Web sites because doing so ensures all calls are answered in a consistent manner. It also frees up sales staff to follow up with previous customers.

In addition, companies can use different toll-free numbers in different promotions—magazines, newspapers, Web sites, or even radio and TV ads. This allows these firms to measure the effectiveness of various promotions by running simple reports that let them see which numbers are being used to call the voice landing page. If ads in particular publications or on a specific Web site are not generating leads, companies can tweak the ads, and jettison the publications or sites. Ads that are driving calls can be renewed.

Calls are answered. Marketing effectiveness is measured. Whether the economy is good, bad, or indifferent, it all makes business sense. **DM**

Think of a voice landing page as a sales voice mail box on steroids. Because voice landing pages are hosted, rather than using on-site telecom equipment, they have virtually unlimited capacity and there are no associated capital costs.

are faced with a dilemma. They need to retain customers. They need to market to attract new ones. They need to evaluate the effectiveness of marketing channels. They need a credible e-presence. They need to answer all calls. And they need to spend every diminishing marketing and promotional cent effectively.

Any company would be foolish to give up its digital footprint; however, implementing a low-cost voice strategy that can help companies evaluate the effectiveness of

hear busy signals or have calls redirected to voice mail. This may cause some callers to hang up. Others might leave messages, but will they be around when calls are returned? None of this helps the company close sales; nor does it help the company measure the effectiveness of its advertising.

There are options.

A company can hire more staff and install more phone lines. It can extend business

Rob Nevin is a vice president with Aizan Technologies Inc, a hosted voice solutions company based in Richmond Hill, Ontario. For more information about this solution visit www.aizan.com/vlp. To hear a voice landing page demonstration, call the Aizan Voice Landing Page at 1-866-660-6765.

EVENTS CALENDAR

July 8
Toronto
IAB Canada's Paid Search Marketing Course
Team instructors include Tom Tsinas, VP, Business Development; Jennifer Osborne, VP, Paid Search; and Mike McDougall, account director; Search Engine People. Class limit: 75 attendees. Cost: IAB member \$400, non-member \$500. Contact www.iabcanadaevents.com.

July 10

Toronto
IAB Canada's course in Social Media Marketing and Web 2.0
Instructor: Mitch Joel, noted Social Media marketing expert and president of Twist Image. Class limit: 120 attendees. Cost: IAB member \$400, non-member \$500. Contact www.iabcanadaevents.com.

September 13-16
St. Louis, MO
IFCA Annual Conference
The Insurance & Financial Services Association,

an international organization for professional communicators in the insurance and financial services sector, is holding its annual conference including two-day programming. Topics include: Creating a Performance Driven Marketing Organization; Making Connections that Move People; Becoming a Better Writer; Crisis Communications Made Simple; and Leveraging Social Media and Networking in your Marketing Communications. Location: Hilton at the Ballpark Hotel in downtown St. Louis. For further information, visit www.ifcaonline.com or contact info@ifcaonline.com.

September 16 – December 9, 2009
(one evening p/week)
Toronto
CMA Promotions Certificate
This course is designed for marketing professionals, both agencies and clients, who want to improve their promotion strategies, learn how to integrate this strategy in their overall marketing plans, and develop the skill set to enhance their ability to bring successful promotions to life. In a saturated market and challenging economic times, promotions are more than ever a way to both increase sales

and act as a key differentiator for your brand. This course will teach you how to be successful in the short-term goal of the promotion and how to translate that success into long-term marketing potential.
Course duration: 13 weeks, one evening per week, Wednesdays 6:30 p.m. - 9:00 p.m. Final Exam: Wednesday, December 9, 2009 Location: Ontario Bar Association Conference Centre, 20 Toronto Street, 2nd Floor, (King subway station) Toronto, ON. For more information, visit www.the-cma.org.

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PRESIDENT
Steve Lloyd - steve@dmn.ca

PUBLISHER
Mark Henry - mark@dmn.ca

EDITOR
Pat Atkinson - pat@dmn.ca

MARKETING INFORMATION COORDINATOR
Adam Lloyd - adam@dmn.ca

ART DIRECTOR
Vanessa Dhanbeer - vanessa@dmn.ca

SENIOR ACCOUNT MANAGER
Peter O'Desse - peter@dmn.ca

CONTRIBUTING WRITERS

Rick Brough
Bernard Drost
Paul Gallant
Felix Gill
Rob Nevin
Phil Olivier

Brian Perry
Cam Shapansky
Miro Slodki
Kalan Vuksanovich
Emma Warrillow

LLOYDMEDIA, INC.
HEAD OFFICE / SUBSCRIPTIONS /
PRODUCTION: 302-137 Main Street North,
Markham ON L3P 1Y2 Phone: 905.201.6600 Fax:
905.201.6601 Toll-free: 800.668.1838
home@dmn.ca www.dmn.ca

EDITORIAL CONTACT:

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