

CASE STUDY

Battle Bridge Labs

The experience of a high growth digital marketing agency is observed as it prepares to expand infrastructure significantly to capture an important partnership.

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perpetualsales.com

Abstract

This case study was performed and written by Knox Ink, Inc. (Los Angeles, California) using customary standards and practices for studies of this nature.

The experience of a high growth digital marketing agency is observed as it implements a crucial new partnership, necessitating a 400% expansion of operations and customer service capacity.

The eight-year-old agency was known for producing successful outcomes for clients and had drawn the attention of a larger agency seeking a subcontracting partner. Because Battle Bridge had grown organically by its founder's efforts, little infrastructure, systems, or controls existed with which to absorb the massive increase in business.

Securing the partnership required immense and rapid growth.

Management called on independent advisory firm Perpetual Sales to assist in designing and implementing upgrades to the sales, customer onboarding, and customer services processes.

This study observes the time period in which the participant prepares for and moves through extensive upgrades to its operation and infrastructure while simultaneously accepting new referrals under the partnership.

Management authorized planning to commence and requested advisement on standards, controls, and systems.

Introduction

At the outset of the study time period, Battle Bridge Labs was a 6-person digital marketing agency located in Los Angeles, California. This article describes the experience of the company following the processes executed by the service and advisory contractor Perpetual Sales to ...

- ▶ Create processes, standards, and control for sales and new customer onboarding.
- ▶ Create processes, standards, and control for customer account servicing

Observation was made of the practices already in place, the required speed of the upgrades, and the immense cost of failing or delaying the opportunity.

The company's name, logo, and identity were already in place and were untouched through the engagement. Instead, Perpetual focused on infrastructure and systems for expanding sales with the existing brand in place.

Observation One: Need for Standardization of Sales Practices

Existing sales practices were sufficient to attract new business from the founder's network but required development to maximize the new revenue opportunity. New, much more junior sales reps needed to be able to close sales without the founder present, creating a need for codified sales practices and language.

Observation Two: Need for Customer Service Infrastructure

Prior to this time period, the agency's two principals had personally handled every customer account and had done so relatively independently. Consequently, no single procedure existed to train new personnel. Serving the massive influx of new customers now required a single, optimized method with standards and controls.

Speed was the dominant context for evaluation of Perpetual's processes and their outcomes.

Methodology

To achieve the stated objectives, the participant, Battle Bridge Labs (private corporation), engaged Perpetual Sales (independent consultancy) to design and implement standards, systems, and controls for both sales and customer service.

Perpetual Sales (*Perpetual*) provided staff who worked fulltime at the Los Angeles offices of Battle Bridge Labs (*Battle Bridge*) throughout the project.

- ▶ Perpetual's processes and timeline for expanding and upgrading sales and customer service methods were revealed to Battle Bridge management at the outset. The plans were authorized by management and designated as the framework for reporting and evaluation of the engagement.
- ▶ Perpetual's findings and recommendations were provided to Battle Bridge management at recurring progress report sessions, and authorization was provided for actions requiring budget.
- ▶ Battle Bridge principals provided an orientation on existing sales and customer services practices, and authorized Perpetual staff to take over all aspects of sales and customer service.
- ▶ Perpetual executed selling activity and began documenting customer priorities, biases, and decision processes. While securing new customers and revenue, this process also produced discoveries that were organized into documents, resources, and systems enabling Battle Bridge to continue sales efforts economically after Perpetual's engagement concluded.

Battle Bridge was unaware that it would later be asked to participate in an interview after the engagement. The project's two phases were both completed in nine months.

During the interview, the facilitator posed a series of twelve (12) prepared questions. After the participant's response, the facilitator was authorized to pose a maximum of one (1) follow-up question for each original question.

Processes

Perpetual carried out two of its business processes for Battle Bridge to resolve the issues identified by management: Standardize Sales Processes and Implementation of Infrastructure for Sales & Customer Service.

Perpetual revealed its process plans and sequence to management prior to commencing. The processes were approved and designated as the framework for progress reporting to Battle Bridge management throughout the process.

Standardize Sales

► DEVELOPMENT OF VERBAL BRAND ASSETS

Perpetual developed verbal brand assets to sell Battle Bridge's offerings to new referrals, while capitalizing on Battle Bridge's strong reputation. Verbal brand assets are elements of the densest, most distilled messaging about an organization, starting with a Brand Promise and extending through the brand's Ideology, Voice, and Values.

The verbal brand assets became the basis for the drafting of prospecting scripts, sales language, and marketing collateral.

Development of brand verbal assets required analysis effort, identity development effort, and high-skill copy writing.

► DEVELOPMENT OF COLLATERAL

Based on the verbal standards now set, external resources were created or upgraded, including a customer guides, presentations, sales letters, and seasonal promotions.

Development of collateral entailed analysis effort, sales management effort, copy writing, and creative effort.

Implement Infrastructure

Because Perpetual was engaged solely to work with the new referrals, Perpetual worked solely first-time sales to new first-time customers. In this context, the requirements and behaviors of new customers were isolated and easily observed, enabling Perpetual to quickly recognize the critical mass of customer requirements to close a first-time sale.

► DISCOVER CUSTOMER PRIORITIES, BIASES, & DECISION PROCESSES

Since each principal had previously handled all sales and customer service organically, no single or consistent history existed of the most effective tactics. Consequently, Perpetual's first task was to combine and distill the founders' existing knowledge into a sales approach that could be equally effective by more junior reps in the future.

Based on interviews with the principals, Perpetual drafted a sales approach including prospecting language, value proposition, sales language, and test closing practices.

Perpetual tested its draft sales approach by handling 100% of sales and customer onboarding for Battle Bridge for a period of sixty (60) days. By iterative trial and error, Perpetual refined the sales language based on customer responses and new information gathered from early sales calls.

Discovering customer priorities, biases, and decision processes requires high-skill selling effort, analysis effort, and high-skill closing effort.

Implement Infrastructure

► DEVISE CLOSING METHOD AND LANGUAGE

Since new sales reps would be required to continue sales after Perpetual's departure, their closing practices had to be documented into a method that could be trained to less experienced sales reps.

Discoveries from the previous phase were documented in resources for the upcoming sales team to be hired. Materials delivered by Perpetual included multiple formats of value proposition presentations, talking points, FAQ, closing methods, etc., all combined into a Sales Training Manual.

After conducting initial sales personally, Perpetual staff delivered a documented closing method based on customer priorities, biases, and decision processes discovered during early sales.

Design and training the closing method required analysis effort, closing skills, high-skill copy writing, and training effort.

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Implement Infrastructure

► IMPLEMENT CRM SYSTEM FOR CUSTOMER SERVICE

To enable high volume customer service on a proactive basis, Perpetual implemented and configured a SaaS CRM (Customer Relationship Management software) for Battle Bridge, creating separate modules for use by sales reps, and customer service reps, and management.

- The CRM system was used to implement high volume customer service in an in-house call center environment.
- Weekly and monthly customer service schedules were integrated into the CRM to assist reps in automatically servicing customer accounts with proactive ongoing maintenance.
- Scenarios, scripts, talking points, and FAQ were documented into a customer service training manual. Three (3) new customer service reps were hired and training workshops were conducted.

Erecting the customer service operation required analysis effort, data management skills, copy writing effort, and training effort.

► SALES REP COMPENSATION MODEL

Based on the pricing and sales forecasts, Perpetual drafted and refined a new sales rep compensation model which was approved by Battle Bridge management. The compensation model was used in recruiting, hiring, and performance evaluations for new sales reps.

Developing the compensation model involved research effort, analysis effort, and QM (quantitative methods) effort.

Findings: Part One

STANDARDIZE SALES PROCESSES

Implementation of the Perpetual business processes for Standardizing Sales Processes revealed multiple enhancements which were integrated during the diagnostic and development steps in the processes.

- The selling techniques of the company's founders were observed to be effective though inconsistent. Some of the techniques were also nuanced and personal to the principals such that they might not be trainable or workable for rank-and-file sales reps. To enable training of new sales reps, the best aspects of each principal's approach were integrated and refined into new, single set of selling language and tactics.
- The increasing volume of customer referrals from the new partnership was serviced using the new language, presentations, forms, and collateral created by Perpetual.

The practices were refined based on use for six months and were eventually found to be effective given the closure rate and drop in attrition.

Findings: Part Two

IMPLEMENTATION OF INFRASTRUCTURE

Implementation of the Perpetual business processes for Implementation of Sales Infrastructure revealed efficiencies that resulted in smoother operations despite a massive increase in sales and customer count.

- Incoming customer service requests actually **declined** even in the presence of a 400% increase in accounts serviced and a 600% increase in ad spend managed on behalf of those customers. This stable state was attributed to the amount of information and service now being provided to customers **proactively**, eliminating most incoming customers service requests.
- The new infrastructure also made upselling and promotions easier due to the data available on customers and the ability to use automation to make more content with customers more often.
- The partner agency providing the referrals praised the expansion of operational infrastructure and authorized the permanent continuation of the partnership.

Conclusions

Based on the experiences of the study period, Battle Bridge management concluded that the new infrastructure required to support the partnership was highly cost-beneficial. The participant reports that:

- Following the roll-out of the new brand and the launch of the new products and sales division, the company saw a drop in both customer attrition and reported customer issues.
- As new referrals from the partner flowed in, customer accounts were onboarded with a close rate approximate 50% higher than previously achieved.
 - Month 2 saw an increase of 100% in the number of new customers onboarded successfully per week.
 - Month 4 saw an additional increase of 200% in the number of new customers onboarded successfully per week.
- Management credits the methodic processes executed with revealing the infrastructure requirements and implementing them in time to capture the partnership.

In describing the overall experience and effect of working with Perpetual's business process methods, the participant replied "It was like the parting of the Red Sea. All of the sudden, everything seemed easy and our path was open wide. We had focused so much on our craft that we were naïve to the amount of operational infrastructure we were improvising. What makes it run fast now is the standards and controls."