

CASE STUDY

Aperia

The experience of a mid-size data management company is observed as it prepares for a major expansion.

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Abstract

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

The experience of a mid-size data management company is observed as it prepares for a major expansion. The company (at the time known as “Data Delivery Services, Inc.”) has dominant goodwill throughout the industry, extensive capacities in high-demand aspects of data management, a peerless reputation for quality management, and dominance in their vertical industry.

Having highly saturated their industry, the ten-year-old company set goals to find new revenue by developing offerings in adjacent verticals and subject matter areas. Management had set the aggressive goal to expand revenues by 200%.

Management acknowledged that the company’s brand was largely undeveloped and required upgrading.

The study observes the time period in which the participant prepares for and moves through extensive brand development and realignment. Management authorized planning to commence for rebranding and requested advisement and ideation on a possible new name.

New products approaching their release-ready state required the upcoming new sales division be planned concurrently with rebranding efforts.

Introduction

Prior to the time period of this study, Data Delivery Services (now Aperia) was a 60-person data management company located in Dallas, Texas. This article describes the experience of the company following the processes executed by the service and advisory contractor Perpetual Sales to ...

- ▶ Enhance the company's brand equity
- ▶ Devise and implement first-time sales efforts for new product lines

Observation was made in light of the conflicting objectives of growth that was both rapid and sustainable.

Observation One: Brand Development.

Management believed that brand development, possibly including a new name, would be necessary to achieve the aggressive sales goals handed down from the company's Owner-CEO.

Observation Two: Nascent Sales Organization for new Analytics / Data Visualization division.

Intently protective of existing market share and revenue, management was vehement that the upcoming new products in adjacent areas **not** cannibalize any effort or attention currently devoted to existing products and accounts. A new, independent sales team was required.

Agility, cost containment, and speed provide the context for evaluation of the processes and their outcomes.

Related topics discussed include change management, organizational culture, and risk.

Methodology

To achieve the stated objectives, the participant, HIPAA Help Center (private corporation), engaged Perpetual Sales (independent consultancy) to diagnose causes of low sales and recommend solutions.

Perpetual Sales (*Perpetual*) provided staff who worked fulltime at the Dallas offices of HIPAA Help Center (*HHC*) throughout the project.

- ▶ Perpetual's findings and recommendations were provided to DDS management at recurring progress report sessions, and authorization was provided for actions requiring budget.
- ▶ Perpetual provided options and led management through a decision process to select the company's new name: *Aperia*.
- ▶ Perpetual jointly executed on all brand development including verbal and imagery brand assets, messaging, market alignment, positioning, and collateral.
- ▶ Perpetual staff executed all first-time selling activity to discover customer priorities, biases, and decision processes. From this process, new revenue and customers were secured. This process also produced discoveries that were organized into documents, resources, and systems enabling DDS to continue sales efforts economically after Perpetual's engagement concluded.

The project's two phases were both completed in twelve months.

DDS 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.

At the conclusion of the engagement, Aperia's COO Bobby Bowyer agreed to be interviewed about the project.

During the interview, the facilitator posed a series of fifteen (15) 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 DDS. The processes, plans, sequence, and timeline were revealed to DDS management prior to commencing.

The processes were approved and designated as the framework for progress reporting to DDS management throughout the process.

Brand Development

► RENAMING THE COMPANY

As the seminal element in identity development, the new name needed to fulfill requirements for engagement, informationality, and memorability all while being legally available, distinct from peers' names, and free of any off-brand connotations or translations.

Perpetual presented eight (8) new identity options to management for consideration and facilitated the company's top management in discussing the options to consensus. The new company name **Aperia** was chosen. The name was crafted from the Latin for "reveal" giving the company a brandable name relating to their function of providing actionable insights via data management.

The naming effort entailed research effort, ideation effort, creative effort, and facilitation effort to reach consensus among management.

Brand Development

► DEVELOPMENT OF VERBAL BRAND ASSETS

Perpetual developed verbal brand assets to introduce the new products while capitalizing on DDS's longstanding 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 IMAGERY BRAND ASSETS

Based on the verbal brand assets, standards were defined for usage of imagery and startup imagery was selected to convey the brand visually.

Setting brand imagery standards and selecting images involved effort in analysis, sourcing, and creative.

► DEVELOPMENT OF COLLATERAL

Based on the verbal and imagery standards now set, external resources were created or upgraded, including a new website, brochures, sales letters, and product demos.

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

Launch Sales

Because Perpetual was engaged solely to work with new product launches, the team worked only on first-time sales to new first-time customers.

► DISCOVER CUSTOMER PRIORITIES, BIASES, & DECISION PROCESSES

Since no history existed for the products or the customers, Perpetual's first task was to discover the customer priorities, biases, and decision processes that would govern customer actions and purchasing.

Perpetual acted as the sole sales reps for the new products, conducting sales calls to test the nascent marketing language and sales pitches drafted for them. By iterative trial and error, Perpetual refined the sales language based on customer responses and new information gathered from early sales calls.

Once Perpetual had developed a sufficient number of initial customer accounts, customer buying behavior and criteria began to emerge. Along with objective criteria like features and speed, subjective criteria were also discovered including a strong customer bias toward aesthetics. A prevalent negative bias toward the rapid growth of similar products was also observed, revealing a need to further differentiate and expound Aperia's reputation as highly established, quality-minded, and reliable.

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Launch Sales

► **DISCOVER CUSTOMER PBD** (continued)

As sales calls continued, customer behavior and buying processes started to show similarity and consistency. Based on this critical mass of working sales language, Perpetual concluded the exploratory phase of sales development and prepared to move the company to a scalable sales organization.

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

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

► **COMPETITIVE ANALYSIS AND MARKET SEGMENTATION**

Secondary research was conducted into the names, products, differentiation claims, and territories of companies offering products that compete with Aperia's. Perpetual categorized product offerings and ranked competitors based on strength of offering relative to Aperia. Key competitors were identified, and differentiation claims were noted.

Based on customer criteria discovered during the last phase, Aperia's differentiation claims were favorably crafted to win sales in the presence of competitors.

Analyzing the competing market and crafting effective differentiation claims required research effort, analysis effort, and high-skill copy writing.

Launch Sales

► DEVISE CLOSING METHOD AND LANGUAGE

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

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.

► MANAGEMENT REPORTING

Management reporting includes all resources management needs to oversee the ongoing processes of a functioning sales organization.

Perpetual articulated critical success factors from the sales processes and designed management reporting to demonstrate those factors numerically and visually. Reports were designed to feature actions executed and progress achieved on all accounts by all reps.

Designing and implementing the management reporting systems required analysis effort, design effort, and training effort.

Findings: Part One

BRAND DEVELOPMENT

Implementation of the Perpetual business processes for Brand Development revealed multiple opportunities for selling which were integrated during the diagnostic and development steps in the processes.

- The company name, DDS, was found to have high goodwill throughout the industry, but low brand equity due to its inherent limitations. While DDS stood for “Data Delivery Services”, it was often confused with the dental industry. In addition, the name was seen as generic and unevocative.
- While the company’s products were known to be high quality, their appearance and design was aesthetically underdeveloped, lacking ease, beauty, and heuristic appeal. It was found that appearance and ease were priority attributes for customers, leading to a new emphasis on user interface design.
- Though the company was seen as a dominant leader in the field, no expert publishing had occurred. It was found that demand existed for published expert content from the industry leader.

Findings: Part Two

IMPLEMENTATION OF FIRST-TIME SALES

Implementation of the Perpetual business processes for Implementation of First-Time Sales revealed strong and growing demand for the new products, as well as high demand for integrated systems stemming from other existing DDS/Aperia products.

- The company's reputation was found to strongly support offering new products.
- The company's instinct that demand existed was refined into a segmented market analysis identifying areas of highest demand for new products.
- The market was found to be growing at a rate that was accelerating.
- The market was found to be attracting large numbers of new entrants, placing emphasis on differentiation and reputation assets in marketing.
- Using sales language crafted as part of the brand development phase, the products were found to be saleable by various levels of sales expertise.
- Sales goals for the new products were found to be rationally forecastable, and the products were declared to be permanent offerings for expansion.

Conclusions

Based on the experiences of the study period, the new products were found to be viable and profitable. 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 100% increase in sales over the coming fifteen months, followed by additional expansion to around 400% of original sales levels in the three years to follow.

The company credits the methodic processes executed with revealing the opportunities and capturing them quickly.

In describing the overall experience and effect of working with Perpetual's business process methods, the participant replied "It was faster than we could have predicted. We knew they knew what they were doing, but we didn't realize how much their methods would accelerate the outcomes."