

DIRECTIONS

A QUARTERLY NEWSLETTER FROM THE COMPETITIVE BUSINESS STRATEGY GROUP



FEATURES

STOP SEGREGATING SALES AND SERVICE

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CBSG NEWS

Stop Segregating Sales and Service!

Very smart, capable business-people have an overwhelming inclination to compartmentalize issues. Why we segregate things is not important. It could be for simplicity, for self-preservation or even a basic genetic defect.

For instance, how do companies respond to the intricacies of customer satisfaction, retention and loyalty? Some concentrate on the sales perspective by instituting "customer-focused" selling or relationship management tactics. Others focus on achieving "excellent" customer service (whatever that means). In each case, the "solutions" are segregated along functional lines.

More importantly, once we get past the "hullabaloo," measurable results are sparse. When all is said and done, customers still defect at disturbingly high rates.

For the last few years, we have researched, assessed, tested and implemented customer retention and loyalty strategies. As a result, we developed a truly unique model, the Continuous Customer Contract.

What makes our program so distinctive? We tackle "customer issues" by integrating sales and service into one, continuous process. In other words, CBSG's sales process incorporates a company's sales efforts with its service delivery. With our innovative methods, we turn retention and loyalty into a tangible asset—more profits.

Now, a picture is worth a thousand words, so the flowchart on page 3 tells the story graphically. If you are so moved, we are always happy to discuss the program details. ←



SUZANNE BALDINO JONES
PRESIDENT

MARK W. HEISLER
MANAGING PARTNER



NEXT LEVEL, NEW LOOK

We're pleased to announce the Continuous Customer Contract (CCC), our customer retention and loyalty business model, now has its own unique logo. It emphasizes our approach to uniting sales and service with a distinctive, bold mark indicating the importance of their relationship.

"One of the main considerations in developing the look of the CCC logo was to make it unique. It needed its own identity, but it also needed to work with the organization's existing corporate logo," said Creative Director Bob Colleluori, of Robert Michael Communications.

Look for it to unite sales and service as the Contract moves to the next level.

EDITOR NOTES

DIRECTIONS is published four times annually. Designed by Robert Michael Communications, Inc.

Editors: Mark W. Heisler, Suzanne Baldino Jones. Please contact either editor at 1-888-411-5800 with any questions or comments.

Visit us at www.cbsg.com

CBSG II E U S

There's lots of excitement at CBSG these days. Here is the latest. We recently developed a real-time customer survey and database for RTE Asset Management. This tool enables RTE to monitor and assess its client base on its own.

CBSG began several new assignments. For the Kades-Margolis Corporation – we are applying the Continuous Customer Contract to create a Service Center and develop "branding" strategies. We are conducting "Train the Trainer" workshops for Porter-Novelli International, the third largest public relations firm in the country.

CBSG recently addressed attendees of the "Success of the Female Entrepreneur" Conference at the Pennsylvania Convention Center on October 20, 1999.

In the coming months, CBSG is speaking about retention and loyalty at the following venues:

- ➔ Investment Company Institute Operations Conference at the Walt Disney Dolphin Resort in Orlando, November 15, 1999
- ➔ Greater Philadelphia Chamber of Commerce on Tuesday, December 7, 1999
- ➔ National Tax Sheltered Annuity Association (NTSAA) in Tucson, January, 2000

For more information, visit our website at www.cbsg.com.

Finally, since CBSG's work was featured in *Selling Power* magazine, we are receiving more media attention. Philadelphia's all-news radio station, KYW 1060, featured our customer retention tactics in segments that aired on August 7th and 8th. Our work will also be featured in *Philadelphia Enterpriser* magazine's November issue.

That's all for now. ◀

INTRODUCING CBSG'S TURNKEY SOLUTION

Seven years ago, we transformed our first company using an integrated approach to sales and service to increase customer retention and loyalty. Since then, we have improved and fine-tuned our methods.

Now, we're "making it easier for our clients to do their own business" by introducing our customer retention and loyalty program, the Continuous Customer Contract.

This intensive 3 1/2 day workshop provides companies with step-by-step instructions to implement our model on their own.

The first workshop is scheduled for April 16-20, 2000, in Philadelphia, PA.

Here are a few details:

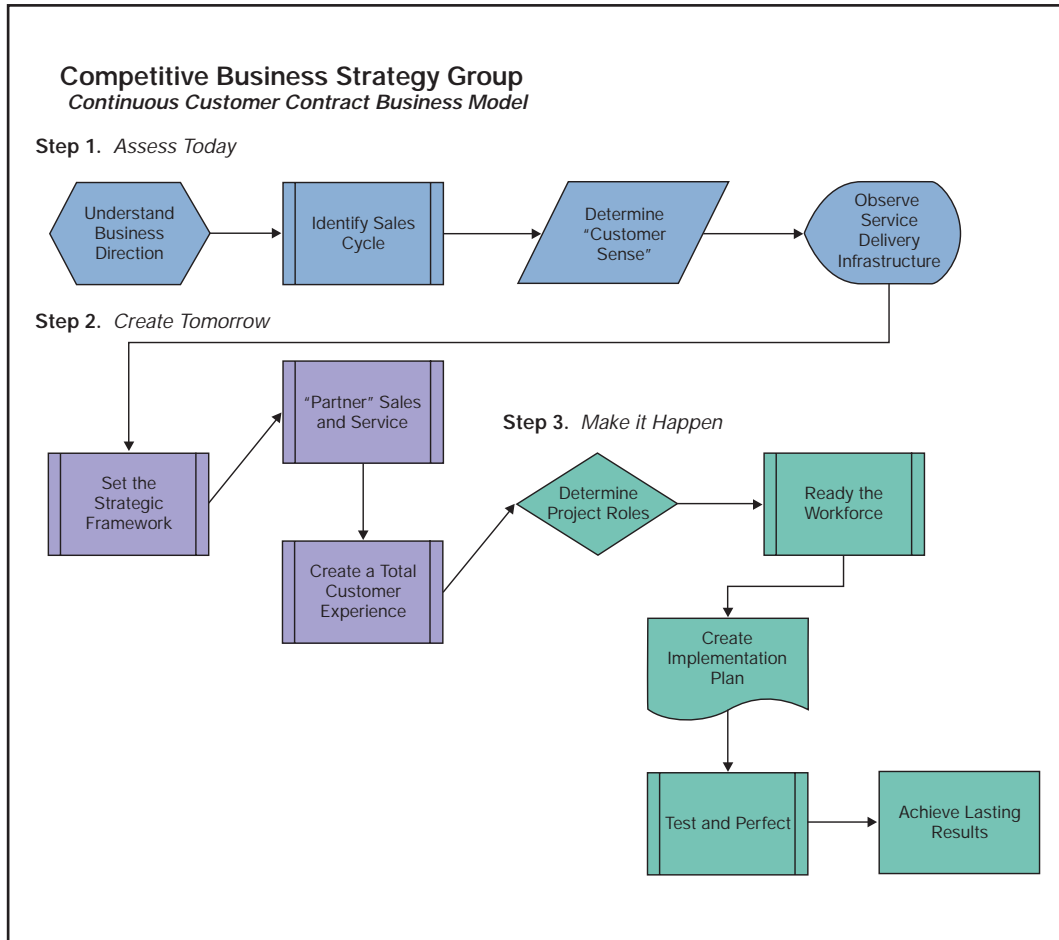
1. The workshop is team-based. We implemented the Contract with consulting clients using project teams. Therefore, we recommend the same approach for companies attending the workshop. The team should include the project's executive sponsor and

leader, along with team representatives from the sales and service/operations sides of the business.

2. All attendees receive CBSG's Implementation Guidebook. We share the same methods and tools we successfully use on consulting assignments.
3. CBSG is there when you need us most. During implementation we continue to support each team with 20 hours of personal consulting. There is no additional cost for this program feature.

To learn more about the workshop or the retention model itself, call us at **888-411-5800**, visit our website at www.cbsg.com, or see us live at an upcoming speaking event (our schedule is also on our site). We'll keep you posted on further developments. ◀

Continuous Customer Contract Business Model



CBSG "EXECUTES" NEW VIDEO

In an effort to develop its multimedia learning tools, CBSG has just released its first feature video.

"Execution of a Promise" is designed to use in conjunction with CBSG's new Continuous Customer Contract workshop, as well as seminars and speaking engagements on customer retention and loyalty.

The theme of the video is that companies routinely make sales "promises" to customers to get their business, but fail to deliver on them. Why? The customer is caught in the "disconnects" that occur between salespeople and the service deliverers. In the end, the only way to address these customer issues is for

companies to stop segregating their sales efforts and service delivery.

So, don't be a segregator. Be sure to attend a CBSG workshop soon to see "the Execution" for yourself. ←



Professional actors helped make CBSG's new video informative, thought provoking and entertaining.

HIGHLIGHTS

Quote to Note

"Very smart, capable businesspeople have an overwhelming inclination to compartmentalize issues... (but) why we segregate things is not important. It could be for simplicity, for self-preservation or even a basic genetic defect."

CBSG

See CBSG Live!

- *Investment Company Institute Operations Conference at the Walt Disney Dolphin Resort in Orlando, November 15, 1999*
- *Greater Philadelphia Chamber of Commerce on Tuesday, December 7, 1999*
- *National Tax Sheltered Annuity Association (NTSAA) in Tucson, January, 2000*

Make it the Millennium for Retention Resolutions

Let CBSG tackle your customer retention issues in the New Year.

*Call us at **888-411-5800** or visit **www.cbsg.com** to make the millennium the start of solutions.*