



**Acquire and Retain Customers:
A Sales Toolkit for Warehouse-Based 3PLs
Prepared by IWLA for Member Use**

Step 1 - Clarity

- What business are you in? How do you want to be known? What solutions do you provide your customers that uniquely serve their business needs? How do you provide your customers with a unique business solution to their problems? Until you answer those questions, you do not have a marketing plan to implement.
- Question: Is there alignment among how you see your company, how your employees see your company, and how your customers and prospects perceive your company? In other words, does the way you want your company to run permeate the culture so that every employee, every customer, and every prospect can tell your corporate purpose?
- Question: Have you surveyed your current customers and your employees to answer the question above? Have you surveyed your current customers to see if they see you as a provider of positive market advantage for them? If not, do it. This will tell you whether you, your company, and its service is in alignment with your business values and whether you have properly identified your customers' key business need.
- Question: What will it take for your company to perform in the manner that you can, with integrity to deliver on those values? If you say you have a 99.999% fill rate accuracy, 1) is that a fact?, and 2) does that distinguish you in the market from your competitors? My hunch is that all 3PLs must produce to an incredible accuracy in fulfillment rate; therefore it is a given and does not provide you the competitive advantage.

Step 2 - Focus

- Identify and list those customers you want. Write them down. Get the information about them from their website, from Linked-in, from Facebook, from news articles via Google or a similar search engine, or a purchased prospect database.
- Once you have your list, identify those trade associations and business groups your prospects attend. Get their member lists, and read their publications and websites so you comprehend their issues from their viewpoint and become an expert in their concerns.
- If you are in chemical warehousing, you should look at chemical producers, distributors and retailers associations. If you are a rail-served warehouse, consider joining the various rail shipper associations. If you in retailing, retailers have their own association as well. A quick web search will yield the industry associations that best represent the customers and prospects that you choose to pursue.
- Clarity of your competitive advantage in the minds of the customer is the most important value and you must reinforce that value through all of your literature, websites, wall posters, newsletters, and office water cooler conversations. Every employee should be able to recite your company's competitive advantage.

Step 3 - Attention

- Results are what pay your bills and grow your company.
- You must measure, validate, and modify each part of the marketing plan as you gain experience in the implementation of the plan.
- Lay out an organizational chart that shows each person's role and responsibility in delivering on your company's value, and how those values are perceived by the customer and prospect.
- Only by laying out the process in writing can you measure activity, diagnose problems, and apply the appropriate fix.
- Appendix A contains the IWLA marketing plan and the flow charts. These documents enable IWLA management and staff to make sure that we are implementing the plan and can adjust links as needed.

Step 4 Intention

Are you measuring sales activities that merely fill out a form or fill up your prospect funnel?

Each salesperson must get four points every day.

Here is how points are earned:

- 1 point for an introduction, lead, or referral.
- 2 points for making an appointment with a decision maker.
- 3 points for attending an appointment with a decision maker.
- 4 points for closing a sale.

Automate and keep score. Check up each week. This system puts accountability where you want it and focuses on results, not just activity. It is an early warning system for sales performance. If your reps are not earning four points per day, you have a starting point for a coaching conversation designed to improve their performance.

While there is no silver bullet for sales performance, we have found the 4 point to be an outstanding flash report. When we are generating 4 points per day and 20 points per week, closed sales follow.

Appendix A

Plan Overview

Duration of Campaign: Calendar Year 2010
Campaign Manager: Faith Ramey
Supervisor: Joel Anderson

Objectives:

- 1. Financial Growth = \$1,047,000 warehouse dues 2010**
- 2. Financial Growth = \$156,000 new warehouse dues booked in 2009, including installation fees of \$26,400.**
- 3. Financial Retention = Loss of no more than \$133,000 in annualized warehouse dues in 2010.**
- 4. Member Count = 449 at December 31, 2010**
- 5. Member Count (New) = 84 in 2010**
- 6. Member Count (Drops) = 67 in 2010**

Target Message = Members receive a market advantage through our business solutions - programs, products, and services unique to IWLA members.

Target Market = Warehouse-based 3PLs in the USA and Canada

Current Market Segmentation of IWLA Membership

Small < 250,000 sq ft = 47% by numbers and 23% by revenue

Medium > 250,000 to 2,000,000 sq ft ≤ 42% by numbers and 51% by revenue

Large > 2,000,000 sq ft = 11% by numbers and 26% by revenue

Target Contact Market

1430 Warehouse-based 3PLs in the USA and Canada as follows:

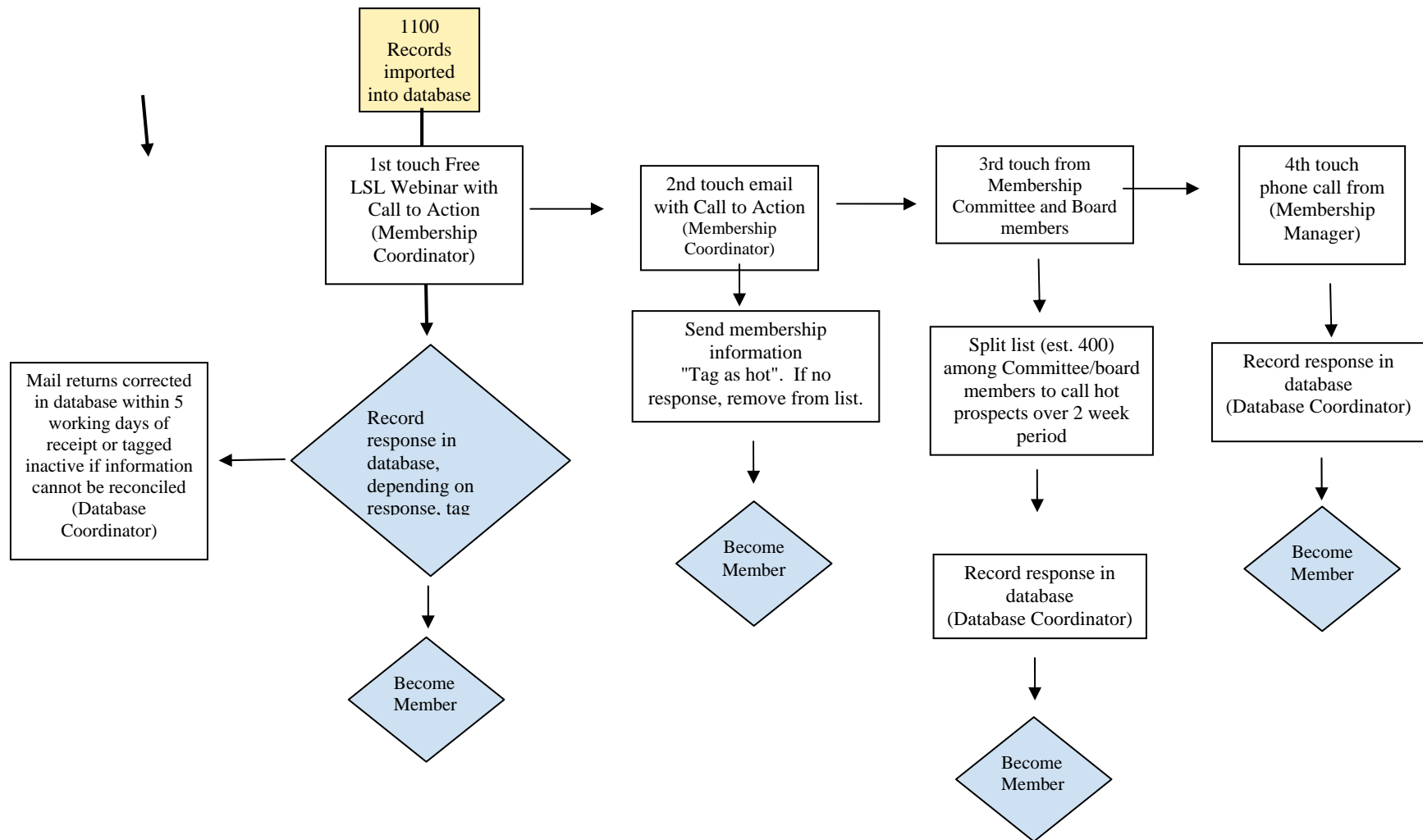
1100 from the Price Waterhouse Coopers Prospect List (culled and scrubbed)

130 from members canceled in the last 3 years

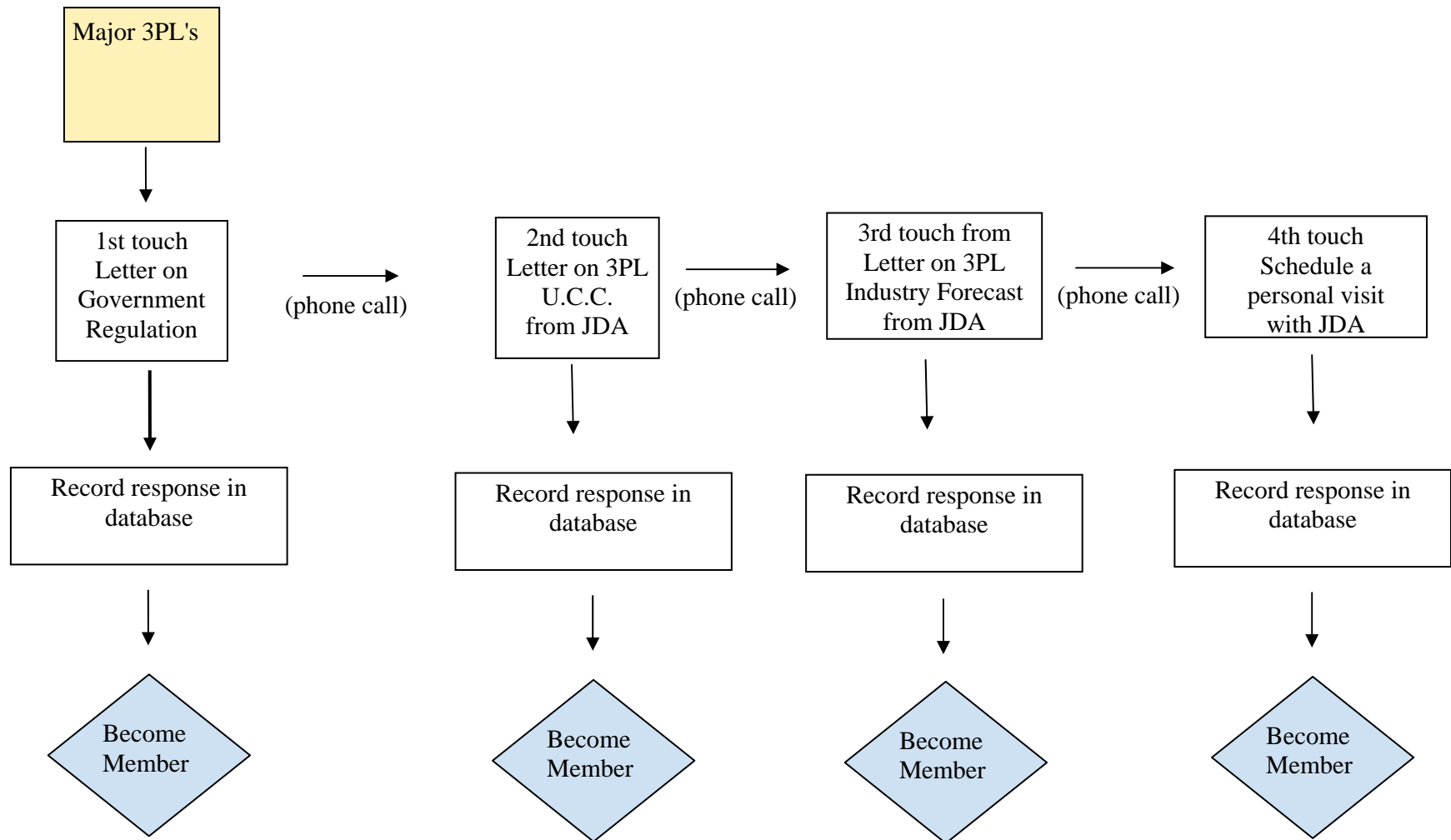
100 from member referrals, web hits, and inbound phone calls.

100 from regional and educational meetings or direct sales calls

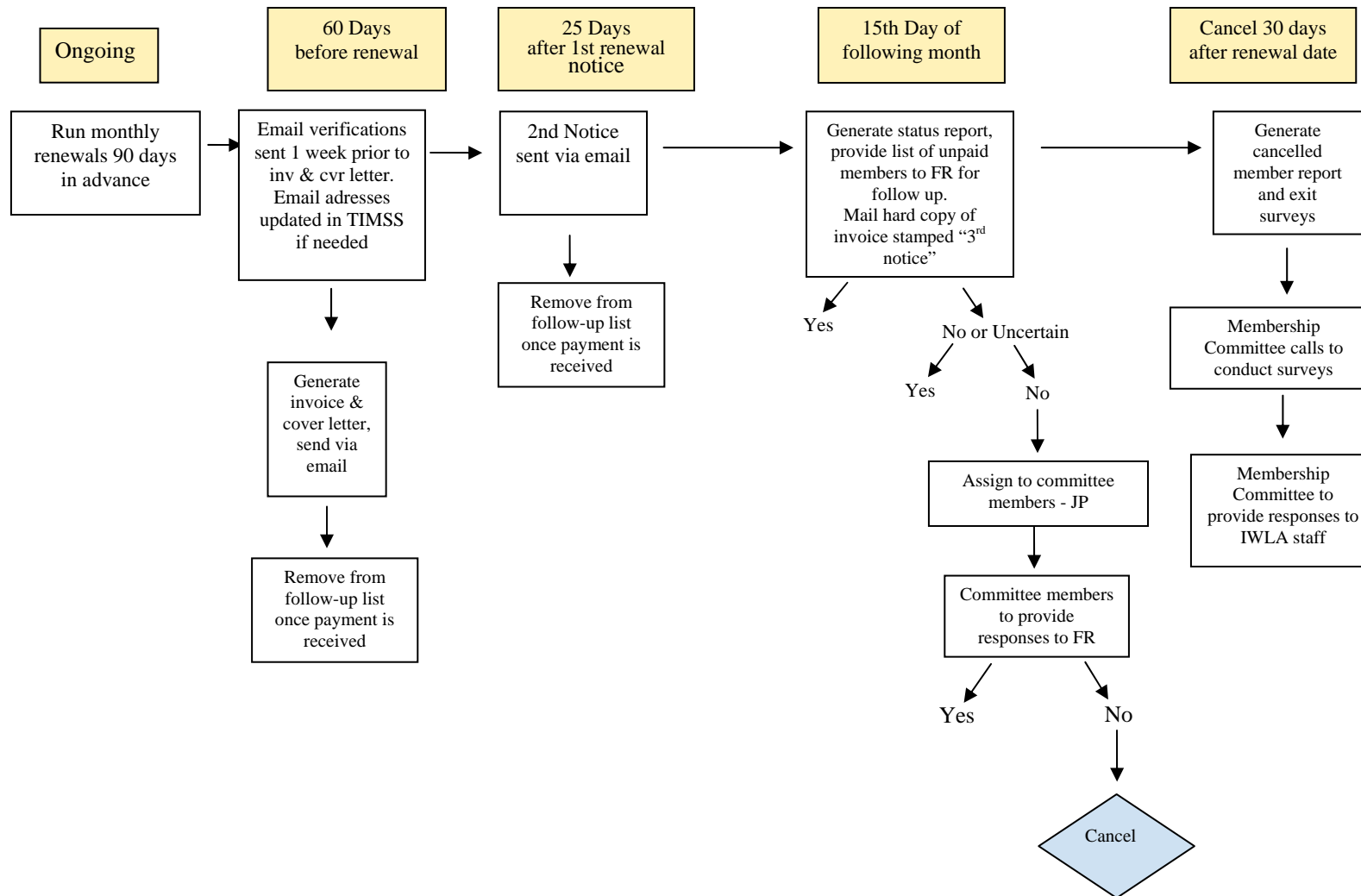
Acquisition Plan – 4 Touch Program



Acquisition Plan – Major Accounts



Retention Plan – Dues Renewal



Appendix B

Do you have an elevator speech to provide your prospects already in mind?
Here are the IWLA examples:

12-second speech

Summarize in one simple sentence what your company does or provides.

“Our products, services, and programs provide our membership the competitive edge.”

Proof statement: Testimonials from our January 2009 marketing piece on each one of our six value propositions. Choose the one that you have diagnosed has the most relevance to the prospect.

30-second speech

Summarize in a few simple sentences what your company does or provides.

“Your business will benefit from IWLA membership because we are owned by businesses like you for the benefit of businesses like you. Our products, services, and programs provide our membership the competitive advantage in today’s marketplace and give you the tools to increase your profits.

“Members who join and take advantage of their association have a history of industry profitability and leadership, such as Kenco, Genco, Grimes Logistics, DSC, and Prism Team Logistics. These are the businesses you want to be around.”

Proof statement: Testimonials from our January 2009 marketing piece on each one of our six value propositions. Choose two that you have diagnosed has the most relevance to the prospect.

3-minute speech

Once you make the introduction, use questions. Your task is to survey the prospect, discover their number one business need, validate that need, and determine whether IWLA is positioned to positively address that need. Measure how often you speak. If you are speaking more than 20% of the time, you are NOT focusing on the prospect.

Hi Mr. ABC, thank you for taking my call. Did I catch you at a good time? If not, I know you are busy. May I have a time that is good for you to discuss your company and the IWLA? Great, I will call you to confirm that time. Here is my number in case you need to reschedule. Do you have a pen handy? I will wait. My cell phone (or direct line) number is 555-111-2222.

If the prospect has the time, proceed as shown below:

“Please tell me about your company and your 3PL business IWLA? How do you distinguish yourself in today’s competitive marketplace? Can you describe your number one problem in bringing about that result?”

“O.K. so that I fully understand your operation, you perform the following services and you distinguish yourself in the marketplace **in the following manner**, is that correct? And, your number one concern in attaining that result **is the following**. Is that correct?

“Great, can you tell me what you know about the IWLA and our membership programs, products, and services?

Thank you, Mr. ABC, I heard you say that you see IWLA as performing the following services and your evaluation of our product is **“repeat their comments to validate.”**

Mr. ABC, first I want to communicate to you that IWLA is owned by businesses like you to give their company the competitive edge in the marketplace.

Our products, services, and programs provide the tools to increase their profits. Our value proposition has six elements, as follows:

1. Advocacy
2. Retained Legal Counsel and Legal Forms
3. Education and Training
4. Networking and Knowledge Sharing
5. Promotion of Your Company and the Industry
6. Discounted Services on Products and Programs for the 3PL Industry.

“Which of these is of interest to you?”

“Fine, Mr. ABC, can you tell me why you selected this value proposition and why it is of interest to you?”

Great, here is what our members who use that service have to say about their benefit (Quote from the testimonial handout). Does that sound like something that you could use for your company?

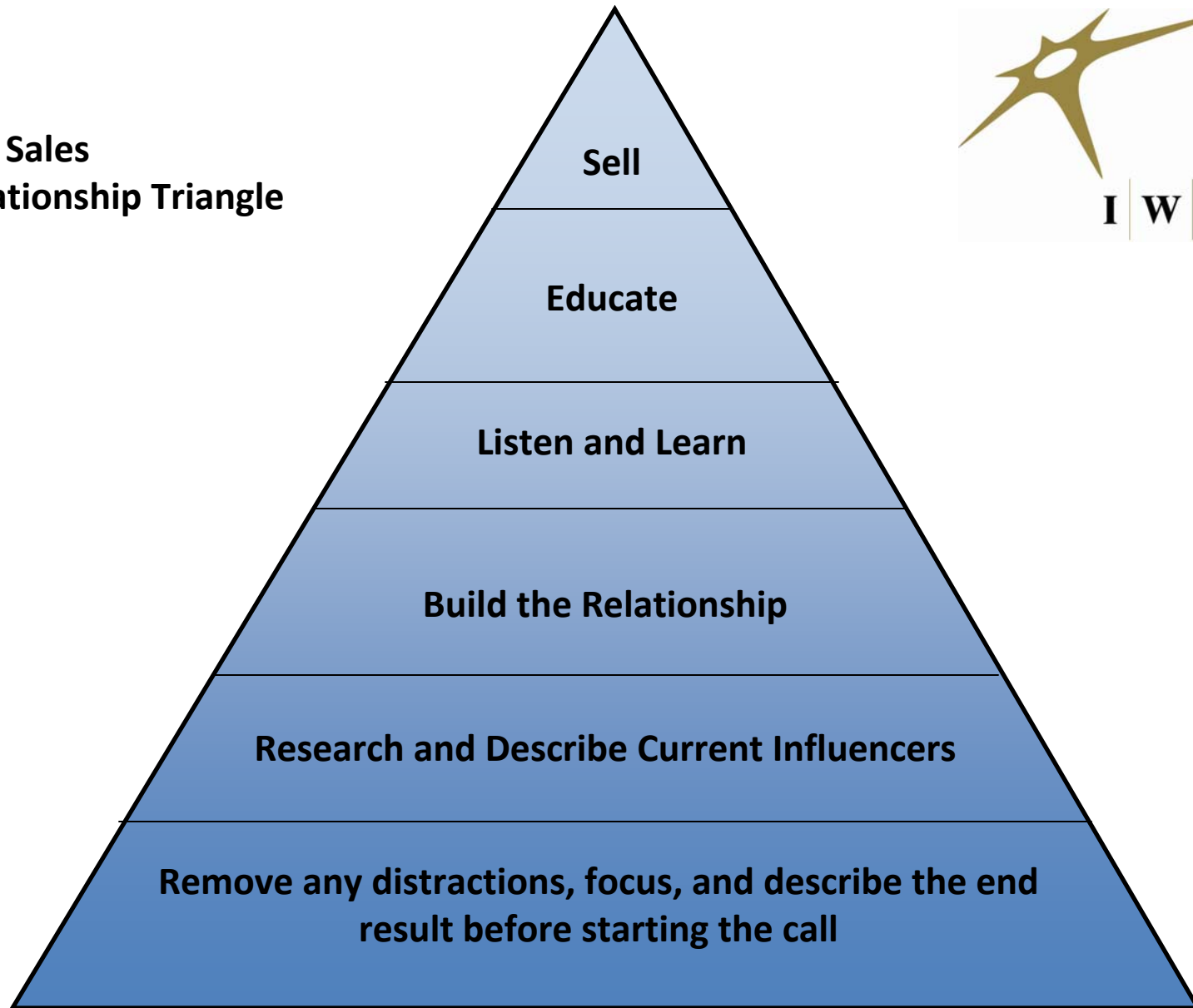
“Great, are there any other questions you have about the benefits of IWLA membership? If not, may I process your membership application?”

Appendix C

Phone Skills for Telemarketing

- When you introduce yourself – always ask “Hello – NAME, did I catch you at a good time?” This simple act of courtesy sets you apart and opens the door for the prospect to name a good time to call if the time is not right.
- If the answer is “No”, then say, “I know you are busy Ms. ABC, what is a good time to schedule an appointment to talk to you. I will call you to reconfirm, and should anything come up, here is my phone number for you to call as well.
- Create expectations on your voice mail. Do not use pre-recorded messages, do not say you will get back when you can. Put yourself into the voicemail and create an expectation that you and your company are different, and that your service will astound them.

**The Sales
Relationship Triangle**



I | W | L | A