

sales & marketing management

On the Same Page

Gain competitive edge with a company-wide focus on customers

In the fall of 2003, a trip to a local Lexus dealership turned out to be an unexpectedly eye-opening experience for one marketing executive at a commercial real estate lender in Dallas. Not only did she walk away with a new car, but she also was so impressed by the way she was treated that she reported the experience to upper management at her own company.

What caught the executive's attention – and what's now used at her company, undisclosed for competitive reasons – was a new approach to managing customer relationships, dubbed customer touchpoint management (CTM). The basis for the methodology, and what distinguishes it from customer relationship management (CRM), is “the understand that companies' relationships with customer are not just about sales,” says Hank Brigman, president of Touchpoint Metrics, a research consultancy based in San Rafael, Cali-



fornia, that worked with the real estate lender to implement CTM. “It is the responsibility of the whole organization.”

Touchpoint Metrics used a proprietary process called Touchpoint Mapping to formulate the company's CTM plan. Through interviews with employees and customer, Touchpoint Metrics uncovered what it calls a “touchpoint gap” in the real estate company's

loan-processing procedures. Based on the findings, Touchpoint Metrics recommended that the company add a new touchpoint—an additional customer interaction—between the loan processing and loan servicing steps. It is too soon to determine the impact of the added step on the real estate company's bottom line (it was implemented in July 2004), but, Brigman says, “Feedback on both the customer and employee sides has been positive so far.” Visit Touchpoint Metrics at www.touchpointmetrics.com.

– Sara Calabro