

# Integrated Channels Marketing™

## A case study

Positioning and promoting the  
Continental Resources  
VOSc Infrastructure Solution as the  
integration and value proposition  
driving bottom-line results

- Identifying the issues
- Crafting the solution
- Tracking the results

Our client, Continental Resources, Inc. (CRI), a Bedford, Massachusetts, solutions provider, is one of the largest Sun Microsystems iForce Strategic Partners in North America. CRI faced a complex set of needs: increase sales volumes and profit margins, enhance relationships with customers and technology providers, and generate immediate results.

CRI evaluated and accepted the complete set of Serino Associates' marketing services – from strategic planning to technological consulting to creative development and implementation.

Serino Associates met the challenge.



## A Comprehensive Program

The primary value Serino Associates provides to Continental Resources, Inc. (CRI) is the creation of integrated marketing campaigns based on understanding and resolving CRI needs and the needs of its customers and technology provider partners.

This documents summarizes a program that

- Improved brand awareness of CRI and its partners
- Increased sales and created larger pipelines of qualified leads
- Established systems that helped CRI manage the sales process
- Enhanced the perceived and actual value that CRI provides to its customers and partners

In summary, Serino Associates

- Interviewed client's executives, managers, and sales people to understand company and departmental needs and goals
- Conducted ongoing research to learn, confirm, and reconfirm what issues were of primary concern to Fortune 1000 and small-to-medium business (SMB) information technology (IT) managers, directors, and corporate executives
- Developed marketing and marketing communications plans
- Created corporate identity materials and statements
- Created sales tools and marketing collateral
- Identified the CRM capabilities needed by CRI's executives
- Confirmed that the client's existing SAP implementation could resolve the customer relationship management (CRM) need
- Worked with CRI's internal IT team to engage the inherent SAP CRM capabilities
- Wrote the IT manager's CRM user guide
- Wrote the sales rep's CRM user manual to ensure understanding of the proposal generation, lead tracking, and order tracking systems
- Sought out and qualified vendors, affiliated third parties, and independent software vendors (ISVs) to participate in the campaign
- Worked with all vendors to ensure all technical and business messages were understood, clearly articulated, and included seamlessly in CRI materials
- Designed the database needs statement
- Built the database through many name acquisition/enhancement/appending methods
- Conducted comprehensive lead generation campaigns
- Established and conducted a regular communications process and program with four complementary key vendor partners
- Generated thousands of inquiries and more than 1,250 qualified appointments

## ■ The Situation

Continental Resources, Inc. develops IT infrastructure solutions for major U.S. businesses by analyzing client needs, providing, configuring, and testing the components, implementing solutions, and supporting the systems to resolve client needs. Sun Microsystems technology platforms form the basis of CRI's infrastructure solutions. CRI also represents complementary OEMs, utilizes a portfolio of software products, and delivers a suite of its own Professional Services, including high availability and other enterprise solutions.

## ■ The Challenge

CRI had to increase both its revenue and profit margins significantly – without adding new product lines and the additional costs and resources needed to support them. CRI had to continue to drive unit volume of servers, licenses, and related devices. CRI also had to provide higher levels of more comprehensive solutions. Since profit margins for hardware sales had declined to historically low levels, selling solutions represented the best method to address the profit margin issue.

## ■ The Analysis

Serino Associates recognized that CRI's unique position enabled CRI to resolve the business needs of both its customers and their key technology providers. CRI could establish and claim an overlooked industry position ... as an organization more capable than a value-added reseller, but much less expensive and much more accessible than the major global systems integrators and consulting organizations.

- Customers and prospects, operating on tightened budgets, needed to implement effective technology solutions and prove that these solutions provide a higher return on investment (ROI) than investments made in other segments of their core businesses. IT infrastructures affect the core focus and bottom line of CRI's customers.
- Technology providers needed a reseller that could not only close new business, but could also identify

customer needs, propose solutions, track and communicate the status of the sales leads with the appropriate vendors, implement solutions, and report results.

## The Solution

Serino Associates recommended, planned, and implemented a two-pronged solution:

- To meet customers' and prospects' needs, CRI should extend the existing globally promoted initiative sponsored by Veritas Software, Oracle Corporation, and Sun Microsystems (known as the VOS Initiative) to include networking (Cisco Systems) and CRI's Professional Service offerings. CRI would promote the package as the most complete IT infrastructure solution – now referenced as the VOsc Initiative.
- To meet technology providers' needs, CRI should provide more highly integrated solutions to its customers through the VOsc offerings, and to communicate the status of the program with their technology providers by tracking and communicating sales leads and results.

## The Implementation

Serino Associates worked with CRI to combine products from the four leading technology companies – Veritas, Oracle, Sun, and Cisco – with CRI's Professional Services to create the CRI VOsc Infrastructure Solution.

Serino Associates then created a comprehensive campaign to promote the VOsc Infrastructure Solution to CRI's customers and prospects and up-channel to its technology providers. The following list shows the sequence of Serino Associates' activities:

- Validate the Solution:
  - >Internal Interviews
  - >Technology Provider Interviews
- Qualify the Team
- Develop the Marketing Communications Plan
- Support Lead and Sales Tracking
- Establish CRI Customer Relationship Management Implementation
- Create Sales Tools and Marketing Collateral
- Conduct Lead Generation Activities

### *Validate the Solution: Internal Interviews*

Serino Associates interviewed executives, managers, and sales people at CRI to

- Identify the IT infrastructure needs and goals of CRI customers
- Confirm that CRI had the desire and resources to meet its customers' needs
- Verify the opportunity for the VOSc Infrastructure Solution
- Enable CRI to understand the value of this solution

### *Validate the Solution: Technology Provider Interviews*

Serino Associates met with each VOSc company to

- Solicit support for this integrated solution
- Hone the value proposition to accurately represent CRI's strengths, and to ensure all key technology provider messages were clear, integrated, and presented appropriately

### *Qualify the Team*

Serino Associates qualified technology providers, affiliated third parties, and ISVs to participate in this integrated solution. The group comprised the following:

- Sun Microsystems
- Oracle Corporation
- Veritas Software
- Cisco Systems
- Tripwire, Inc.
- Financial services providers
- Others

### *Develop the Marketing Communications Plan*

The marketing communications plan

- Highlights the needs of the target audience
- Details the ways CRI can meet those needs
- Specifies the methods for communicating CRI's capabilities

### *Establish CRI Customer Relationship Management (CRM) Implementation*

Continental Resources asked Serino Associates to establish a process to communicate with its customers and partners. CRI also wanted to track and report the status of opportunities. Working with CRI's internal IT team, Serino Associates developed a closed-loop data-capture process that ultimately enabled CRI to determine the most effective means of reaching its customers.

To accomplish this goal, Serino Associates

- Identified the necessary Customer Relationship Management (CRM) capabilities
- Confirmed that CRI's existing SAP implementation had needed modules
- Worked with CRI's internal IT team to utilize those inherent SAP CRM capabilities
- Assisted in building the lead-generation database through numerous methods
- Created training materials to ensure the system was both understood and employed
  - How-to guide for sales representatives
  - Why-you-must guide for sales managers
- Ensured that CRI communicated the lead generation information to the appropriate people
- Enabled CRI to measure ROI for each marketing activity
- Communicated lead status within the company and also to appropriate vendors

### *Create Sales Tools and Marketing Collateral*

Serino Associates conceived, wrote, and published new sales support materials to help CRI sales representatives implement the CRI VOSc Infrastructure Solution, including the following:

- CRI corporate identity materials and statements
- Prospect/sales rep opportunity identification and qualification worksheets
- White papers on topics ranging from security to enterprise management and The book *Enterprise Storage:55 Questions & Answers*

### *Conduct Lead Generation Activities*

Serino Associates established the messaging, themes, and media schedule necessary to promote the CRI VOsc Infrastructure Solution. Serino Associates also provided creative services such as writing, design, printing, mailing, project management, and letter shop services to include the following:

- Direct response activities
- E-mail activities (rich e-mails and text-only e-mails)
- Advertising (including print, electronic, billboards, and radio)
- Industry trade event support
- Lead fulfillment
- Web tools

### ■ **Serino Associates' Strategy: Use Existing Resources**

- Differentiate CRI as a total Infrastructure Solutions Provider by demonstrating that it has the experience, resources, and capabilities to implement totally integrated IT infrastructure solutions for Fortune 1000 businesses.
- Enhance CRI's partnerships with leading technology companies by tracking and reporting lead status consistently and comprehensively. This impacts the vendor representatives' personal incomes positively.
- Leverage the existing complementary marketing/promotional activities sponsored by each key technology provider.
- Improve relationships with, and sales to, existing customers through consistent personalized communication, cross selling, and a more complete solution set.
- Establish regularly scheduled CRI/vendor events.
- Motivate CRI sales staff by tracking and recognizing both lead generation and sales success rate.
- Enable CRI sales managers to use objective facts to help direct their teams.

### ■ **Increase Sales and Profits**

- Increase the average selling price for each transaction by recommending an integrated solution, including all four technology providers, in lieu of individual components.
- Improve the overall margin of each order by adding CRI's profitable Professional Services.
- Increase the sales volume of each VOsc technology provider by supplying leads, sales tools, and communication processes.

### ■ **The Results**

The CRI VOsc Infrastructure Solution generated more than 1,250 prospects, as measured by on-location appointments for CRI sales reps. These appointments represented new opportunities for CRI. Because the integrated offering was both attractive to customers and broad in scope, each opportunity created greater sales and profits for both CRI and, by extension, its technology providers. The higher value proposition and associated promotional efforts to customers and vendors enhanced the CRI brand in primary and ancillary markets.

Continental Resources has topped the *Boston Business Journal Book of Lists* (Reseller Category) for three consecutive years. CMP's *VARBusiness Magazine* lists CRI in the top 150 resellers in the United States. Continental Resources has maintained the number one or number two position as Sun's top North American reseller for at least thirty-six consecutive quarters.

## ■ Integrated Channels Marketing™

Relationships between high-tech manufacturers and their distribution channel partners usually do not perform optimally. Expectations are frequently based on misconceptions of what one partner can or will do for the other.

In 1993 Serino Associates established the discipline of Integrated Channels Marketing™ to resolve the situation that exists among high-tech manufacturers and their distribution channel partners. As early as 1977, Serino Associates principals realized that relationships based on these misconceptions usually result in wasted time, misdirected efforts, missed sales goals and wasted marketing funds.

Integrated Channels Marketing means

- Establishing or evolving a relationship based on mutual need, common sense, business realities, and market opportunities
- Promoting that relationship such that it solves business problems for companies up and down the high-tech supply chain

Conceptually, the process is simple. In practice, partnering relationships, sales goals, market focus, and partner expectations are too often based on wishful thinking or strong-arming a short-term tactical advantage.

Serino Associates' systematic approach to resolving marketing challenges provides effective solutions to high tech manufacturers and their distribution partners.

## About Serino Channel Services

Serino Channel Services is a channel marketing services provider that specializes in the channel segment of the high-tech industry. Since 1993, when the company was known as Serino Associates, Inc., we have provided a full range of channel development solutions, including lead generation, marketing consultation, joint vendor/partner planning, creative services, and outsourced marketing department to in excess of 120 major high-tech vendors, software companies, and their distribution channel partners including distributors, Solutions Providers, integrators, VARs, and Managed Service Providers.

## About Serino Channel Services; List development

Serino Channel Services also provides a comprehensive suite of list and list development services to our clients. Having been involved in list sourcing and database development since the early 1980s, we feel that Serino-developed lists offer the best value available today for high tech vendors and channel partners working together to find new business opportunities.

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