



Relationship Marketing 3.0

Thriving in Marketing's New Ecosystem



D I G I T A L C E M E N T

Peppers & Rogers Group

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Thriving in Marketing's New Ecosystem

Executive Overview

The world has changed: power has shifted from companies to customers, and the traditional ways marketers controlled their messages are gone. To succeed today, marketing needs to transform—customers *expect* companies to change. The only way for a company to earn attention and loyalty is to develop an authentic and relevant relationship.

These days customers trust each other far more than they trust a company's brand. Don Peppers, co-founder of Peppers & Rogers Group, explains the new dynamic in this way: "People's friends and colleagues have always played a role in shaping their opinions. However, social media makes it easier and more convenient than it ever was to access and act on those opinions. This development is putting a nail in the coffin of companies that build their business on a single unique proposition and then throw it out there to see how many people will bite on it. Flexible relationship marketing programs represent table stakes to participate in the economy these days."

Think about it: Networked consumers can quickly sap brand value. Consider the significant hit to Domino's reputation, and revenue, because of an employee prank video on YouTube (page 4). On the other hand, this new breed of consumers can strengthen a company's brand message and boost its bottom line. For instance, customers who join General Mills Canada's "Everyday Celebrations" program generate more business because they value the community created by the program's recipe and meal-planning guidance (see case study on page 8).

While economic volatility has crimped marketing budgets, the business case for innovative relationship marketing programs is more compelling than ever. Social networks present valuable new reservoirs of customer intelligence for companies that can access and harvest the data. Always-on mobile communications and smart phones can facilitate more relevant interactions, greater customer advocacy and significant boosts to bottom lines. Savvy business leaders can thrive in this new marketplace, but they need to understand the changing environment.

Peppers & Rogers Group and Digital Cement (subsidiary of Pitney Bowes Inc.) recently completed a study, *Relationship Marketing 3.0*, to assess how marketers are responding to the shifting landscape. The online survey was sent to senior level 1to1 Media subscribers, and over 650 marketing executives responded. The study shows that there is a serious disconnect between theory and practice. For instance, 88 percent of the participants stated that they are involved in relationship marketing and understand the importance of building long-term relationships with customers. However, less than a quarter (24%) report they are spending the majority of their budget on enhancing relationships with retention efforts.

This white paper will teach marketers how to connect theory and practice. If they don't, their competitors will.

Key Takeaways

- The rise of social media, always-on mobile connectivity and volatile economic conditions are reshaping marketing.
- These changes pose significant reputation and financial risks and opportunities; they also require companies to deploy relationship marketing to deepen their interaction with valuable customers while measuring the value of these relationships throughout the customer lifecycle.
- Trust is the life-force of successful relationship marketing, and trust is developed and strengthened through relevant communications through relevant channels at relevant times.
- The most effective relationship marketing capabilities must be wedded to overall customer strategy, deployed quickly and adjusted efficiently in response to changing conditions.



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The only way for a company to earn attention and loyalty is to develop an authentic and relevant relationship.

The New Realities of Relationship Marketing

Ready for some trivia? Which publication did one of the most influential reviewers of the biggest software release in the past decade work for?

It's a trick question. The review of Microsoft's Vista operating system two years ago by Adam Fuhrer was one of the most widely read analyses of the operating system's features. Fuhrer was not on staff at any computer magazine or newspaper. His judgments on software gained him a huge following on the collaboration website Reddit.¹

Here's the punch line: When he wrote his review, Adam Fuhrer was a 12 year-old who wore braces and lived with his parents in a Toronto suburb.² Since then, hundreds of other Adam Fuhrers have disseminated their insights and opinions on numerous topics – quite possibly including *your* products and services – in dozens of online realms. Anonymous virtual tastemakers like Adam represent one of the many challenges and opportunities posed by the explosive adoption of social media technology, always-on communication connectivity and smart-phone devices. These developments have profound implications on marketing.

Companies have acknowledged that “say and spray” mass communications techniques may not be as effective as they used to be. And, while many companies have begun to embrace 1to1 communications by tailoring messages and offers to different customer segments, this is no longer sufficient.

Customers increasingly get their brand messages from other customers and peers – not just from the brand itself. Peppers explains, “The relatively small number of people with the most connections in a network exert influence through the cascading effect. If these influencers say something positive about your product, it cascades through the network. However, negative opinions and reviews from influencers also cascade.”

To be successful in the socially connected world, companies need to be aware of these cascades. Peppers continues, “Social networks are like the weather: you cannot predict them any distance in advance. No matter how good your analytics are, you cannot know the future of social networks. In this scenario the only defense against an unjust review or a cascade of bad news is your organization's reputation for trustworthiness.”

To build this kind of trust, companies need to know more than their customer's name and zip codes; they need to understand all of the spheres of influence that affect their most valuable customers, and then integrate that understanding into what, when, how and why they communicate with individual customers. In short, companies need to deploy “relationship marketing 3.0.”

“Companies that thrive in this new relationship marketing ecosystem evaluate, improve and manage their relationship marketing capabilities in a more iterative, integrated and flexible fashion than their competitors,” notes Sharad Verma, President of relationship marketing company Digital Cement, a Pitney Bowes subsidiary. “Doing so enables companies to ‘control what they can control’ while establishing stronger, more durable foundations for brand messages that a growing number of customers control and convey through their own channels.”

Can Microsoft find the next Adam Fuhrer and tailor its message directly to him? Unfortunately, doing so in advance is impossible. Instead, companies must be prepared to respond to, and even take advantage of, unexpected brand impacts, both positive (see *Case Study: General Mills Canada*) and negative, when they do occur.



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Applications: Shiny and new or back to basics?

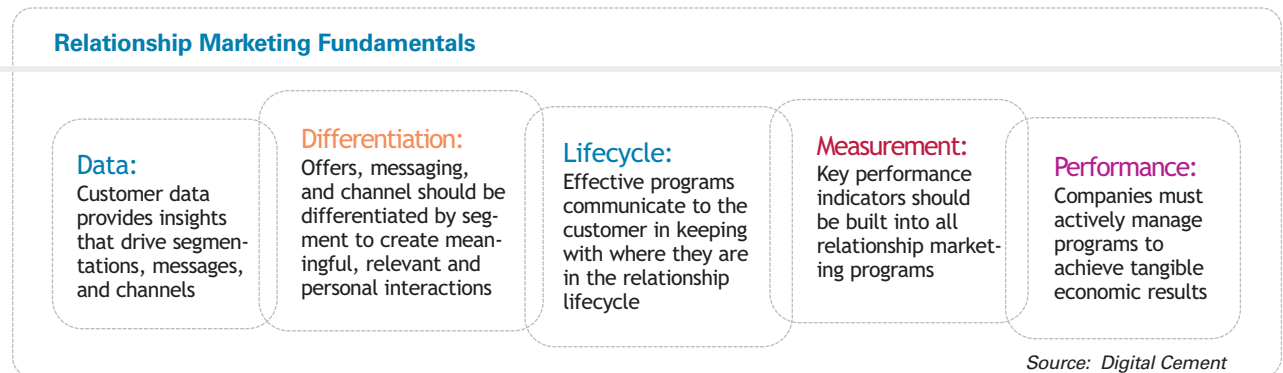
Shiny and New: Successful relationship marketing in era of the connected customer will involve the use of nifty new technology. Consider the potential value of designing smart-phone “apps” as a piece of content that helps draw new customers into a relationship. For instance, a pharmaceutical company could develop an app that alerts allergy sufferers of various pollen, dust and mold counts.

Back to basics: This new ecosystem also requires relationship management programs to extend into highly valuable areas with less gee-whiz appeal. A handful of leading companies are beginning to apply relationship marketing tactics to operational communications, such as regulatory mailings, invoices and statements, that they are required to send to customers. It remains an under-leveraged but important relationship marketing channel.

Trust Us: It's Fundamental

No one knows who (or how old) the next Highly Influential Customer will be, but companies can still thrive in a marketing environment in which they have less control. They can do so by creating a sound relationship marketing approach that builds trust throughout the relationship lifecycle through relevant and increasingly targeted communications, experiences and improvements. Peppers explains, "Relationship marketing can enable companies to cultivate that trust through supporters and advocates who have their own interest in your organization's continued success."

The fundamentals of relationship marketing remain the same, whether new tactics involve messages dispensed over smart phones, on Facebook or into regulatory mailings or billing statements. Paul Erickson, Digital Cement's Vice President, Strategic Growth, says the crucial elements of this approach include:



"True customer engagement remains the result of developing long-term meaningful and sustainable relationships that grow and extend over a period of time across marketing and operational channels," Verma says. "Trust represents the life-force of sustainable customer relationships, and trust is cultivated and enhanced through relevant communications."

Peppers takes it one step further. "You need to be transparently responsive. You need to be honest with consumers. You can't let the lawyers in the room where you prepare your blog posts. You have to do it from the heart."

The strength of a brand's trustworthiness is tested much more frequently as the influence customers exert on the brand continues to soar in the new era of social media. Land Rover, now a Tata Motors company, contended with this challenge recently, thanks to one customer's display of dissatisfaction. Displeased with the durability of his 2007 Range Rover Sport, the customer parked his vehicle on a public street in front of the Land Rover dealership in Colchester, England, where he purchased the SUV – but not before placing signs in his vehicle's windows enumerating all of its mechanical problems (ball joints, front arm bushes, struts, suspension, etc.).

As the dealership had no legal right to move the vehicle, the old-fashioned expression of discontent immediately spread through the virtual world as dozens of traditional and new-media outlets reported on the story.

Diminishing Control and Other Challenges

Other companies are encountering major bumps in the road as they struggle with the new realities confronting relationship marketing. Just ask Domino's Pizza.

Earlier this year, a revolting prank video in which two of Domino's North Carolina-based employees violate health-code standards while preparing sandwiches, appeared on YouTube. Visitors viewed the video 50,000 times the first day it appeared and 450,000 times the following day before it was removed.³ Domino's USA President Patrick Doyle appeared in a response YouTube video to issue a formal apology. Doyle reported that the company had fired the two employees involved in the video (who were also arrested), had begun conducting health audits at all of its locations, and would reexamine its hiring practices.

A survey of 243 U.S. consumers conducted by HCD Research on its Media Curves website two



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Don Peppers, Founder, Peppers & Rogers Group

days after the video appeared found that the images probably exerted a significant toll on Domino's bottom line. Asked to identify which of the following actions they were likely to perform in the next three months, survey participants (all of whom watched the video) responded this way:

	Before Viewing the Prank Video	After Viewing the Prank Video	After Viewing the Apology Video
Go to a Domino's	29%	10%	20%
Order Domino's for delivery	46%	15%	24%
Visit Domino's Website	25%	14%	24%

Adapted from HCD Research⁴

The swift and direct apology helped somewhat, although Domino's continues to address fallout from the original video. As Chris Matysczyk, a prominent marketing consultant noted on CNET hours after the video appeared, "In its trial by social media, Domino's Pizza seems to already have been found guilty."⁵ A Domino's spokesperson told *The New York Times* that "even people who've been with us as loyal customers for 10, 15, 20 years ... are second-guessing their relationship with Domino's."⁶

The rapid dissemination of brand-damaging information and images represents one of several issues marketers must address today. Other challenges include:

Diminishing Control: New digital media tactics face the same pressure as traditional media tactics. As Land Rover, Domino's Pizza, Microsoft and numerous other companies have discovered, many customers no longer accept brand messages passively. Instead, these customers actively shape the brand through their own communications in new channels. And the influence that customers wield do not necessarily reflect the accuracy of their messages. Although Domino's insisted that the food in the original video was not delivered to any customers, survey respondents who indicated that they were less likely to order food from Domino's after the event did not appear to believe that claim. The diffusion of brand control outside a company's four walls requires relationship marketers to monitor and respond to mentions of their brands in the social media sphere. This sentiment was echoed in many of the write-in responses in the *Relationship Marketing 3.0 Survey*. When asked "what is your biggest [social media] challenge, several respondents replied "Managing the risk inherent in the loss of control."

The Era of Hyper-Transparency: One of the reasons customers no longer accept brand messages passively is because they can more clearly see through the messages and determine for themselves which brand message reflects the company's actual decisions, behaviors and culture. Dov Seidman, a leading proponent of principled performance, refers to this development as "hyper-transparency." No longer can organizations "...tell one customer one thing and another something else," he writes on *BusinessWeek's* site. "...Think how easy it is to peer into the inner workings of a company today. Chat rooms, online forums, instant access to financial reports and transactions, 24-hour news coverage from around the globe; almost nothing goes unreported. Because there is more to look at, we want to look deeper. For companies, simply having a vision and mission no longer suffices because people can see whether our behavior is consistent with our vision and mission."⁷

The Shrinking Half-Life of Tactics: "The half-life of relationship marketing tactics has decreased significantly in the past two years," Erickson notes. As a result, relationship marketing tactics used in response to changing consumer demands and perceptions must be deployed, evaluated and, when necessary, revamped or replaced much more quickly today. A respondent to the *Relationship Marketing 3.0* survey put it this way, "Time is a huge budget issue for us."



"The half-life of relationship marketing tactics has decreased significantly in the past two years."

Paul Erickson
Vice President, Strategic Growth, Digital Cement

The Proliferation of Best Practices: Consumers expect a company, and every business within that company, to know and remember them when they purchase a product or service. If you're a retailer, you can no longer tell customers that your brick-and-mortar store will not accept returns purchased at your online site. Why? Because at least dozens of other retailers, regardless of whether they are competitors or not, accept online returns in their physical stores. Consumers no longer understand or accept companies' protestations that their systems don't work, they don't have access to consumer data or "that's a different unit, I'll have to connect you" responses. Too many other companies demonstrate relationship management best practices on a daily basis. The bar is higher and continues to rise.

Economic Realities: In difficult economic times, marketing typically tops most companies' cost-reduction lists. The current global downturn has been particularly painful and, not surprisingly, several areas of marketing have been hammered, particularly mass media and television advertising spending. Those overseeing relationship marketing programs should understand that the overall marketing pie shrinks during volatile economic times. Almost 60% of our respondents said that "demonstrating ROI" was a significant relationship marketing challenge, while 37% cited "acquiring budget," and 23% claimed difficulty in gaining executive support.

"Well-executed relationship marketing campaigns, those that include precise tracking and measurement processes often offer straightforward and attractive business cases."

Sharad Verma
President,
Digital Cement



Relationship Marketing 3.0

Connected consumers, hyper-transparency, proliferating best practices and other forces have combined to reshape the relationship marketing ecosystem. Here's a quick look at the rapidly changing dynamics within this new ecosystem:

	Previous Approach	Emerging Approach
Best Practices	Existed in small numbers in a particular industry	Existed in great numbers across all industries
Marketing Message	Controlled by brand promise	Increasingly controlled by customers (critics <i>and</i> advocates)
Marketing Tactics	Viable for duration of campaign	Viable only as long as customer-feedback data indicates
Execution of Brand Promise	Dependent on success of marketing tactics	Depends on company's reputation for trustworthiness
Company Reputation	Largely dependent on effectiveness of marketing and communications campaigns	Depends on opinions of customers and other stakeholders who now can "see into" companies

Source: Peppers & Rogers Group

Relationship 3.0: Exploiting Opportunities via Iteration, Integration and Flexibility

Fortunately, each of the risks identified above also represents an opportunity. The volatile economy, for example, may exert greater cost-reduction pressure on the entire marketing function. However, Verma asserts, "well-executed relationship marketing campaigns, those that include precise tracking and measurement processes often offer straightforward and attractive business cases."

Although relationship marketing bleeds across many channels, its performance can, and should, be measured. The precision with which returns on relatively small investments can be quantified and managed make relationship marketing an ideal business case subject. Yet today there is much confusion over how to measure return. While nearly 60 percent of the respondents to our *Relationship Marketing 3.0* study said 'demonstrating ROI' was one of their biggest challenges, others are making progress, with 21 percent measuring increases in web traffic, and 13 percent measuring increased customer engagement through customer satisfaction scores, retention and reduced churn.

Additionally, the same forces exerting pressure on marketing messages can be used to strengthen or restore brand messages. "The social networks and related communications technology that

lessen a company's ability to control its brand messages can also be used to solicit insights from consumers that can be used to enhance relationship marketing programs with features that offer greater appeal to consumers," notes Erickson, pointing to General Mills Canada as one example.

The key to mitigating these new risks while exploiting the opportunities is to design and execute a relationship marketing program with the following qualities:

- 1. Iterative:** An effective relationship marketing program does not require a large, expensive and time-consuming business system software implementation. Platform-agnostic capabilities can be developed, tested, measured, adjusted and built upon. These building blocks can be deployed effectively and efficiently.
- 2. Integrated:** The conversation with consumers regarding a brand's promise should take place across multiple channels. "The engagement often begins at a website, where consumers are driven through a variety of tactics," Verma explains. "From there, consumers can opt into email conversations that become increasingly relevant and targeted as relationship marketers test and evaluate new messages." Email and website engagement can also drive conversations into social media sites, such as Facebook, or onto mobile devices. Every targeted discussion should be permission-based. Each channel operates on the same brand promise, and each channel offers a unique way to deliver that promise. "The ultimate objective is to develop relationships with customers that are 'multi-channel engaged' because these types of relationships are valuable, sometimes incredibly so," says Verma. For example, he describes a consumer packaged goods company that recently found its customers who are active in two channels were twice as likely to buy the company's products than customers active in one channel; customers who were active in three or more channels were six times as likely to buy.
- 3. Flexible:** Successful relationship marketing programs must adapt quickly to changing consumer sentiment, and their efficient, iterative nature enables this agility. Dell quickly waded into relationship marketing following the infamous "Dell Hell" criticism by collecting online customer feedback and interacting with customers via its chief blogging officer. The capability was developed in response to a crisis, and it quickly paid dividends. When one poster suggested that the company add Microsoft's former operating system, XP, as an option to be installed on new Dell computers (which, for a brief period, came loaded with the new Vista operating system only), the company noted that the comment had been approved by more than 14,000 other visitors in less than two months, and it began offering XP as an installation option.⁸



Successful relationship marketing programs must adapt quickly to changing consumer sentiment, and their efficient, iterative nature enables this agility.

Conclusion

Relationship marketing would be much easier if a tactic could be deployed and then put on auto-pilot for months. But it would also be much less effective given the realities of the social media revolution, a volatile economy, and the adoption of smart devices and ubiquitous connectivity.

Many of the examples cited in this paper reflect the importance of an iterative, integrated and flexible approach to relationship marketing, often in dramatic fashion. Effective relationship marketing programs of this era do not have to be as dramatic. Instead, they quietly cultivate trust through relevant communications across multiple channels with ever-increasing precision. "These programs steadily replace incentive-fueled offers with value-added insights and information that fulfill each brand's unique promise," says Erickson. "They limit the risks that flourish in the new relationship marketing ecosystem, and help companies exploit new opportunities."

Despite the opportunities flexible relationship marketing provides and the growing customer demand for these capabilities, the majority of companies have yet to leverage this opportunity.

Our *Relationship Marketing 3.0* study reveals that marketers are trying, but just aren't sure what to do. "If you keep your head in the sand, because you aren't sure which way to look, when you pull it out, you are going to be in trouble," concludes Peppers. "Your customers are out there building relationships with friends, co-workers and your competition, and if you aren't at the party, don't expect an invitation in the future." ■

Celebrating Collaboratively, Everyday, at General Mills Canada



General Mills Canada's relationship marketing program, "Everyday Celebrations," is a highly collaborative effort. The cooperation extends beyond the marketing department, and even beyond the company's four walls.

"It is very easy for us to continually get feedback from consumers and then use their feedback to enhance the customer experience so that it's even more valuable to them," says Dave Struthers, Director, Promotion Marketing and Marketing Communications for General Mills Canada. "This really fuels our iterative approach while involving customers in a program that provides greater value to them."

The company, which is part of the world's sixth largest food company and counts Old El Paso, Pillsbury, Cheerios, Betty Crocker, Green Giant and other top brands among its portfolio, recently asked its consumer panel of shoppers about features they wanted to see added to the Everyday Celebrations' site. Within 24 hours, 1,600 members of the panel had weighed in with their ideas.

"We can already see from the data that some of the features we thought were important to our customers actually are not important," Struthers says. This insight will prevent General Mills Canada from wasting money on unnecessary features while providing upgrades that genuinely enhance the customer experience.

The dialogue serves up a tasteful alignment with the company's overall mission to "help make people's lives easier, richer and healthier than ever before."

What's more, this customer communication effort is focused on content, rather than on discounts or coupons. The dialogue serves up a tasteful alignment with the company's overall mission to "help make people's lives easier, richer and healthier than ever before." General Mills Canada's relationship marketing objectives – which are executed through a blend of mass and customized emails designed to increase site traffic and,

ultimately, customer value – show customers how they can conveniently create healthy meals that help enrich their time together at the kitchen table.

The results show the effect relationship marketing has on the bottom line: Households in the "Everyday Celebrations" database purchase approximately 10 percent more General Mills products than other Canadian consumers, reports Struthers, who is excited about the program's ongoing evolution.

"We're not there yet, but we can envision Old El Paso sending a permission-based reminder to a customer's mobile device at 3 p.m. on a weekday," he explains. "The reminder would include a recommended recipe the customer might make for dinner that evening. What's most surprising to us as we look forward is how collaborative the process has been so far. Digital Cement told us this from the start of our relationship: if consumers trust that you are going to ask them questions, listen to their answers and incorporate their suggestions, they are eager to help you build a better program for them."

The Relationship Marketing 3.0 Survey

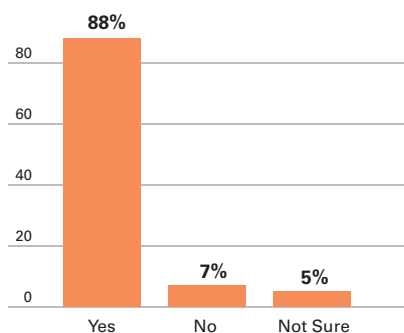
Where Do Relationship Marketing and Social Media Intersect?

Social media has quickly become a critical new tool in the relationship marketing toolkit. Peppers & Rogers Group and Digital Cement conducted the *Relationship Marketing 3.0* survey to not only gain insight to current relationship marketing practices and challenges, but also to understand how marketers are using social media to build deeper customer relationships. The survey was conducted online in July of 2009 and received over 650 responses from senior level marketing professionals from all over the world.

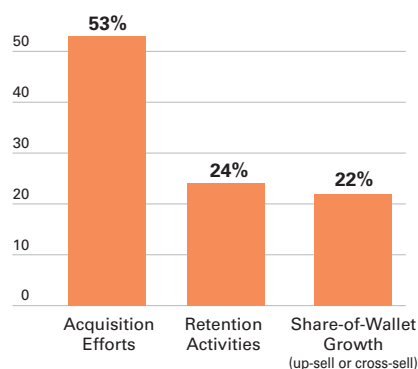
1. Resource allocation is misaligned

Marketers are doing relationship marketing, but they are still focused on acquisition.

Do you employ relationship marketing activities today?



Where is the majority of your marketing budget spent today?

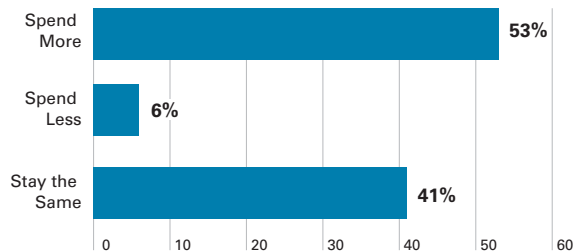


> **Implication:** Organizations need to think strategically about where they spend their marketing dollars. It costs much more to acquire a new customer than to keep one. Relationship marketing helps marketers grow relationships and retain valuable customers.

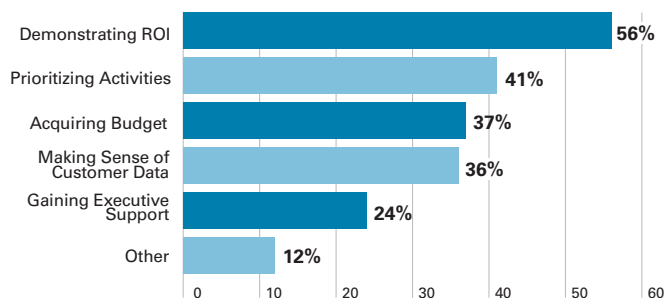
2. Hard to demonstrate return

Marketers are committed to spending but it's still a challenge to demonstrate ROI

How do you plan to alter your spending on relationship marketing next year?



What is your biggest relationship marketing challenge today?



> **Implication:** Organizations need to establish consistent measurement practices that tie back to building long-term relationships and loyalty. Companies must also consider behavior based metrics—referrals, participation in blogs, customer satisfaction—that measure engagement.



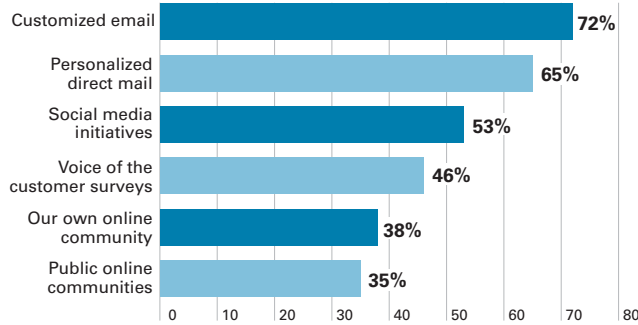
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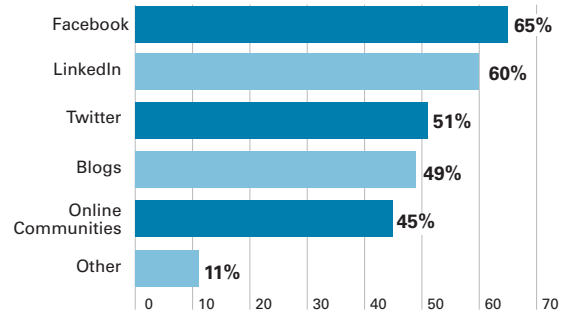
3. No clear winner on which relationship marketing tools are most effective

Companies are trying lots techniques and a variety of social media tools too

What relationship marketing techniques do you employ today?



Which social media activities are you currently involved with?

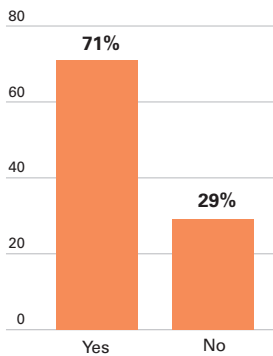


> Implication: Companies should look at customer value as they test new concepts. Which channels do the most valuable customers embrace? Where do their highly-influential customers interact?

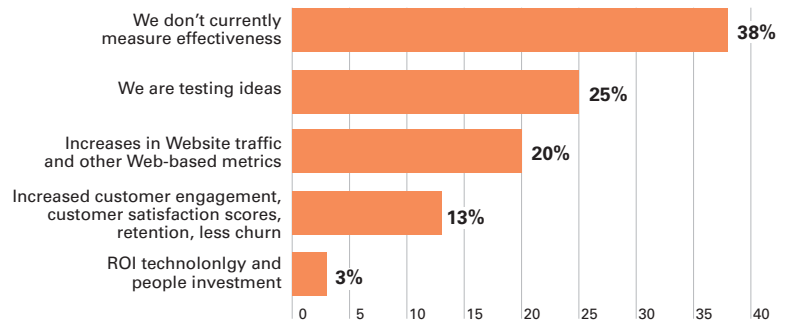
4. Social Media is emerging as an important part of the relationship marketing toolkit

Companies are involved in social media but they aren't clear on what to with it

Are you currently involved in social media activities?



How are you measuring the effectiveness of your social media efforts?



> Implication: Companies should develop a strategy with clear objectives and measurable goals before they launch into any social media activities.



Endnotes

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Digital Cement

Digital Cement is a relationship marketing company which helps leading organizations start, grow and manage sustainable customer relationships. By seamlessly integrating management consulting, measurement and analytics technology and marketing agency services, Digital Cement harvests data insights that drive desired customer behavior. Clients continuously deepen and expand their customer relationships with progressively relevant and valuable experiences.

Founded in 1997, Digital Cement's expertise spans life sciences, financial services and consumer packaged goods, among other industry verticals. The company is a subsidiary of Pitney Bowes Inc. (NYSE: PBI) and has offices in the United States and Canada. For more information, visit www.digitalcement.com

Peppers & Rogers Group

Peppers & Rogers Group is dedicated to helping its clients improve business performance by acquiring, retaining, and growing profitable customers. As products become commodities and globalization picks up speed, customers have become the scarcest resource in business. They hold the keys to higher profit today and stronger enterprise value tomorrow. We help clients achieve these goals by building the right relationships with the right customers over the right channels.

We earn our keep by solving the business problems of our clients. By delivering a superior 1to1 Strategy, we remove the operational and organizational barriers that stand in the way of profitable customer relationships. We show clients where to focus customer-facing resources to improve the performance of their marketing, sales and service initiatives. For more information, visit www.peppersandrogersgroup.com