



PPAI **EXPO** 2023

CONFERENCE

Welcome to today's presentation...

Maximizing Your Time Management

By Evaluating & Segmenting Your Clients

Presented by

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"Maximizing Your Time Management by Evaluating and Segmenting Your Clients" ©2023 – Cliff Quicksell & Associates

Attendee Take-a-Ways



- Identify the numerous time wasters, and how to avoid them
- Determine the various time goal levels
- Prioritizing your work
- Developing a manageable tracking format
- Filling Dead-Time space productively
 - Headwear... Employee Experience
- Marketing and Sales Opportunities

Introductions & Industry Dynamics



- One Constant 24 Hours
- Massive competition
- Massive consolidation
- Clients generally have all of the control
- Internet is a nemesis
- Client loyalty is all but gone
- Our industry has commoditized itself
- Most have a sales and not marketing mentality

What are you worth an hour?

The mentality of many...



“If they can fog a mirror and write a check, I’ll take the order.”



...is this the best strategy?

Identifying Your Ideal Clients & Prospects

- Who are you targeting?
- Where do you have experience or a background?
- Where do you focus your time?
- Have you clearly defined your goals?
- Why should we care?
 - Just sell right?



Where and how do you begin?

Review of Your Existing Clients Base

- Place each of your clients in a formatted Excel spreadsheet
 - Segment by Vertical & Lateral Markets - [defined](#)
 - Do the numbers to include:
 - Sales ~ year over year, for a minimum of 3 years
 - Profitability
 - Gross margin %
 - Number of orders
 - Average order size



This process gives you a visual benchmark & starting point

Analysis of Existing Client Data

Cliff Quicksell Associates Vertical Market Analysis													
Education Vertical Market													
Client Name	Class	2019	Gross Profit	# of Ord	2020	Gross Profit	# of Ord	2021	Gross Profit	# of Ord	2022	Gross Profit	# of Ord
Fiarchild Tech Schools	A	\$ 65,325.00	\$ 31,652.00	15	\$ 64,012.00	\$ 33,215.00	14	\$ 77,221.00	\$ 38,254.00	21	\$ 82,221.00	\$ 40,115.00	27
St Joseph Schools	B	\$ 38,023.00	\$ 16,975.00	11	\$ 41,023.00	\$ 19,587.00	15	\$ 47,236.00	\$ 23,561.00	18	\$ 43,236.00	\$ 20,129.00	17
Travel Trade School	B	\$ 27,365.00	\$ 13,102.00	20	\$ 36,521.00	\$ 17,982.00	25	\$ 43,215.00	\$ 22,981.00	33	\$ 50,215.00	\$ 24,331.00	30
U of Maryland	D	\$ 5,025.00	\$ 2,504.00	2	\$ 4,723.00	\$ 1,987.00	3	\$ 11,320.00	\$ 5,112.00	8	\$ 12,320.00	\$ 6,321.00	7
U of Virginia	E	\$ 1,156.00	\$ 501.00	1	\$ -	\$ -	0	\$ 5,214.00	\$ 2,235.00	6	\$ 15,214.00	\$ 8,112.00	9
Johnson River Falls School District	A	\$ 54,302.00	\$ 28,365.00	7	\$ 49,231.00	\$ 25,478.00	5	\$ 59,214.00	\$ 27,369.00	11	\$ 62,214.00	\$ 29,987.00	14
Bartenders Academy	A	\$ 80,245.00	\$ 42,321.00	33	\$ 71,235.00	\$ 36,580.00	38	\$ 70,218.00	\$ 36,547.00	46	\$ 90,218.00	\$ 46,117.00	55
Crazy Tots	D	\$ 6,125.00	\$ 3,122.00	3	\$ 7,325.00	\$ 3,921.00	3	\$ -	\$ -	0	\$ 13,458.00	\$ 6,117.00	9
Noble Global Education Systems	C	\$ 11,242.00	\$ 4,902.00	2	\$ 12,542.00	\$ 5,214.00	3	\$ 18,326.00	\$ 8,796.00	6	\$ 21,326.00	\$ 9,876.00	9
Totals for Education Vertical		\$ 288,808.00	\$ 143,444.00	94	\$ 286,612.00	\$ 143,964.00	106	\$ 331,964.00	\$ 164,855.00	149	\$ 390,422.00	\$ 191,105.00	177
		2019			2020			2021			2022		
		Avg Gr Profit %	49.6%		Avg Gr Profit %	50.2%		Avg Gr Profit %	49.6%		Avg Gr Profit %	48.9%	
		Avg Ord Size	\$ 2,434.13		Avg Ord Size	\$ 2,703.89		Avg Ord Size	\$ 2,227.97		Avg Ord Size	\$ 2,205.77	

Client & Prospect Classification

- Gives you a perspective on your clients
 - Where are the opportunities?
 - How will you market to these channels?
 - What will those efforts look like?
 - Ensures your marketing efforts are relevant
- Identify what each of those channels looks like
 - Characteristics for each level



Client & Prospect Classification

A-F

H-I-P

A Level Client ~

At least \$10-15K/year

40%+ or greater profit margins

- 50% of their business
- Great sales volume - \$
- Great profitability - %
- Appreciates the relationship

Successful Campaign

Create Proactive Solutions

Challenge: With Current & New Clients, creating a proactive touchpoint

Concept: Identified most salespeople are reactive by nature, create an interactive tool to work behind the scene to create ideas and solutions.

Strategy: Build a proactive marketing touchpoint to engage with client, existing and new to determine all upcoming events from the clients. Saves the client, time, money, and lowers stress.

Outcome: Example with Craig Pierce, and his law firm account



Client & Prospect Classification

F

Level Client

Less than \$500 per year,

- Margins
- Less than 10% of their business
- **JERK!!**
- Very hard to work with
- Doesn't appreciate your value
- Pays late... always

Client & Prospect Classification

H

Hold - New & Reactivated Clients

In this area you need to hold:

- For 120 to 180 days
- Verify and determine client type
- Need to verify classification

Reactivation Protocol

Inactive

Here you need to evaluate:

- All inactive clients, 6 months +
- Segment by A-F level classifications
- Review A/B Tier only
- Determine why they left and IF you want them back
- Create a reactivation program

Successful Campaign

The Imprint Source, Inc.

Original Understanding

- Goal: Reactivate Dormant Accounts
- Spend: \$1,500.00
- Targeting: 76 - A/B level clients
- Deliverable: Box & puzzle
- Outcome:
 - 40% reactivation

New Program Developed and Results

"Identify top tier only"



Client & Prospect Classification

P


Prospects

Determine the 'RIGHT' prospects

- For 120 to 180 days
- Need to verify classification
- Verify and determine client type

Successful Marketing

Targeted towards
HR, Sales, & Marketing Managers



BARRY JACOBSON

STATS

SKILLS	OFF THE FIELD
Honest	Loves to Travel
Dedicated	Poker King
Problem Solving	Head Chef
Hard Working	Exercise Enthusiast
Creative	Dog Dad
Analytical	
Big Picture Thinker	

MORE ABOUT BARRY:
Barry pours his heart and soul into KMK! He is as passionate about his clients as he is about his friends and family! Barry's favorite quote is, "Good things happen to those who hustle."

#17 YEARS AT KMK

Vertical Markets Defined



- Industries
- Divisions
- Internal Departments
- Location
- # of Employees

Examples

- Hospitality
- Banking & Finance
- Medical
- Health & Fitness
- Aerospace
- Automotive
- Construction

Marketing to Existing Clients



Key Points

- Your marketing efforts must be **relevant**
 - Supports the vertical and lateral strategy
- Determine what will be used for each classification
- Values should be dictated by level
- All marketing **MUST** be
 - Engaging
 - Have a Call to Action
 - Memorable
 - Measurable

Same holds true for prospecting – look for the commonalities from your initial analysis

Marketing Touchpoints

Prospects

Based on profiles we can determine the best method(s) to touch this group;

- Direct mail – letters, postcards
- Direct marketing – dimensional mail, creative campaigns
- Electronic – email, e.blasts, Constant Contact
- Face to face – rare but possible

Existing Clients


Same holds true, but we have NOW **defined** this audience

- C & D Group - Direct mail – letters, postcards
- A, B and maybe C Group - Direct marketing – creative campaigns
- A-D Group - Electronic – email, e.blasts, Constant Contact
- A & B - Face to face – we need to create a plan here



Interviewing, Discovery & the Process...

Ties directly to the Discovery Brief...Get Creative, Be Relevant

 <p>Cliff Quicksell & Associates Education • Training • Consulting</p> <p><i>Try to keep Creative Brief to no more than two pages.</i></p> <p><Company> Creative Brief</p> <p>Client Organization: _____ Contact: _____</p> <p>Client Phone: _____ Fax: _____ Email: _____</p> <p>Client Address: _____</p> <p>Street City State Zip Code</p> <p>Project Summary: <i>Clear, concise description of project – keep brief.</i></p> <p>Target Audience: <i>Who are you trying to attract? Be specific.</i></p> <p>Key Messages: <i>One or two key "thrills" – those most important to the project's success.</i></p> <p>Key Benefits: <i>What's in it for the audience?</i></p>	<p>Background/Competitive Positioning: <i>Briefly discuss the competition, market realities, obstacles, etc.</i></p> <p>Communication Strategy: <i>Indicate types of media and any specific elements to be included (logos, key contact information, etc.)</i></p> <p>Desired Message Tone: <i>How do you want the message perceived – creative, innovative, fun?</i></p> <p>Project Timeline: <i>Indicate major milestones.</i></p> <p>Anticipated Budget:</p> <p>Other: <i>Add any key information not covered under the above items.</i></p>	<p>Prepared by: _____ Date: _____</p> <p>Approved by: _____</p> <p>Client's Signature: _____</p> <p>Client's Title: _____</p> <p>Date: _____</p>
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A copy of this brief is available at <https://www.quicksellspeaks.com>

Successful Marketing

Targeted towards
Healthcare



Successful Marketing

Targeted Towards
Legal Community



Measuring & Tracking Your Efforts

A	B	C	D	E	F	G	H	I
Qtr	Marketing Endeavor	Launch Date	Qty	Target Audience	Prop'd Budget	Prop'd Return	Actual Return	Notes
3rd	"Thanks for Penciling Me In..." EXAMPLE	September 1st	25	Law Firms	403.50	\$8,070.00	\$13,566.20	Sent the marketing pieces as outlined in the document proposed by Cliff, the final results exceed my expectations...had some issues with getting past the gatekeepers
WK	Company Name	Contact Name		Phone	Date Sent	Date Followed	Meeting Date	Comments
1	Burns & Johnston Legal Services	Beth Thompson		888-909-8888	5-Dec	7-Dec	15-Dec	She really liked the pieces and scheduled a meeting for next week
1	Family Law	John Smith		787-999-0000	5-Dec	7-Dec		Left VM
1	Legal Eagles	JR. Mulligan		333-888-0101	5-Dec	7-Dec	in January 2012	Spoke with JR, very busy on a case but is interested in talking in again in Jan, asked that I call back around January 15 2012
1	Walkersville Legal Services	CD Douglas		332-222-1010	5-Dec	7-Dec		Left VM
1	Corporate Legal Aid	Richard McFee		555-555-7789	5-Dec	7-Dec		Left VM
2								
2								
2								
2								
2								
2								

Final Thoughts and Your Questions...



- ✓ Know your clients
- ✓ Always Question: this IS Key!
- ✓ Help your clients do the same
- ✓ Drive measurement,
- ✓ Know your worth, become an expert
- ✓ Segment your marketing efforts
- ✓ Create relevant marketing campaigns



Thank you for being here...

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