

# Kiwicare CRM Agenda

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## Main Discussion Points:

1. Outline of current changes and confirm CRM requirements
2. Demo of system in practice and outline of options

## 1. Discussion Points:

### Goals of the CRM project

1. To build a customer database
2. To better understand those customers.
  - a. Where do they live?
  - b. What are they interested in?
3. To better engage with those customers
  - a. How often do they visit our site?
  - b. What triggers make them engage more?
4. To segment our customers
  - a. By product or location to target messaging
  - b. Target those that have high engagement
5. To better service and support our customers
  - a. Automate the delivery of information and/or product support ("register" a product – we trigger information to support that)
6. Paves the way for integration into MyKiwicare.

### Methods of Building Database

1. Competition entries
2. Site enquires – thanks for email, would you like to sign up?
3. Problem solver – sign up options as per existing (Mailchimp)
4. Active newsletter prompts/signups (maybe popups) – need more advice, signup to our newsletter, register for product news/updates
5. MyKiwicare – we explicitly ask what problems or products they are interested in. Add value with alerts etc, Favourite items for later review

### Required CRM Functions

- Capture contact details
- Assign to lists/campaigns, tag appropriately
- Dynamic segments based on tags?
- Automations delivering certain functionality
  - email after a form submission
  - lead scoring based on activity e.g regular site visits
  - automated follow-up support, after for example visiting a page, or a help request answered by David
- Email campaigns, with tracking of customer interactions
- Strong API that we can write/read from



### **Likely Communications**

1. Thank you for signing up to a competition. Cross sell of other products or services, such as the problem solver
2. Seasonal newsletter to all customers
3. Seasonal updates on specific products, or problems that they have signed up for.
4. Conditional content blocks as an option, based on their expressed interests

### **Communication should:**

- Deliver value to the customer
- Reflect their previous interests
- Be relevant

### **Reporting**

- Number of new signups
- Level of engagement – how many are revisiting (and how often)
- What products are people most engaged with
- What other key metrics? How can we prove if we are delivering the promise of a brand authority?
- How can we prove that we're driving sales?

## **2. Demo of CRM Tool**

1. ActiveCampaign.com

## **3. Questions and Summary**

1. Target for number of subscribers
2. How many on MailChimp right now?
3. Problem solver. TZO to review usage We need to know how many emails are being sent from the problem solver "email me" tool