



# OVERVIEW DECK

OCTOBER, 2019

# COMPANIES UNDER-INVEST IN RETENTION AND TAKE RETENTION FOR GRANTED!

*"It's cheaper to keep a client than acquire a new one!" Yet **companies spend 5-10X more on acquisition, when a mere 5% increase in retention can generate a 25-75% increase in net income**\**.

## The Market Need



Less than 5% of companies systematically check the pulse of their customers.



Companies usually spend the most time on their largest customers or the ones that make the most noise, ignoring the rest. Most are leaky buckets trying to acquire new clients to outpace the loss of current ones.



Many companies rely on sales and account manager self-reported input in to CRM systems; data is usually biased and inconsistent.



Traditional surveys are sometimes used; however, these are not consistently deployed, provide results at the summary level (not client-by-client), and are time consuming and expensive.



Companies look for an easy path like measuring Net Promoter Score (NPS). **NPS is not a good predictor of B2B customer sentiment\*\*.**



Account level planning is very timing consuming; even if companies undertake efforts to do a good job one year, business often gets in the way the next year.



Mid level management is often afraid of the answer, as it may make them look bad. "What you don't know can't hurt you."

\* Harvard Business Review, "The Value of Keeping The Right Customers"; Invest, "Customer Acquisition Vs. Retention Costs - Statistics And Trends"

\*\* 2 years of STAMP analysis has revealed NPS is typically overinflated; in B2B, especially in more oligopolistic industries, the players will be "recommended" given their prominence; however, this does not translate to selection or renewal.

# INTRODUCING STAMP™, THE INDUSTRY'S FIRST RETENTION AUTOMATION PLATFORM



*STAMP is the industry's first **Retention Automation** platform that uses AI to systematize the retention process, **saving clients time** and **increasing their retention**.*



## Marketing Automation

A newer generation of companies that automate the outbound email campaigns and workflows, enabling companies to nurture leads

HubSpot



pardot

Marketo



## Sales Automation

Companies that continue to pursue CRM and sales force automation, driven by the success of Salesforce



Microsoft Dynamics

zendesk

zoho



## Retention Automation

The first and industry leading platform that uses AI to automate the retention process

STAMP™  
RETENTION AUTOMATION

# STAMP SAVES TIME AND SIGNIFICANTLY IMPROVES CLIENTS' ABILITY TO RETAIN ACCOUNTS

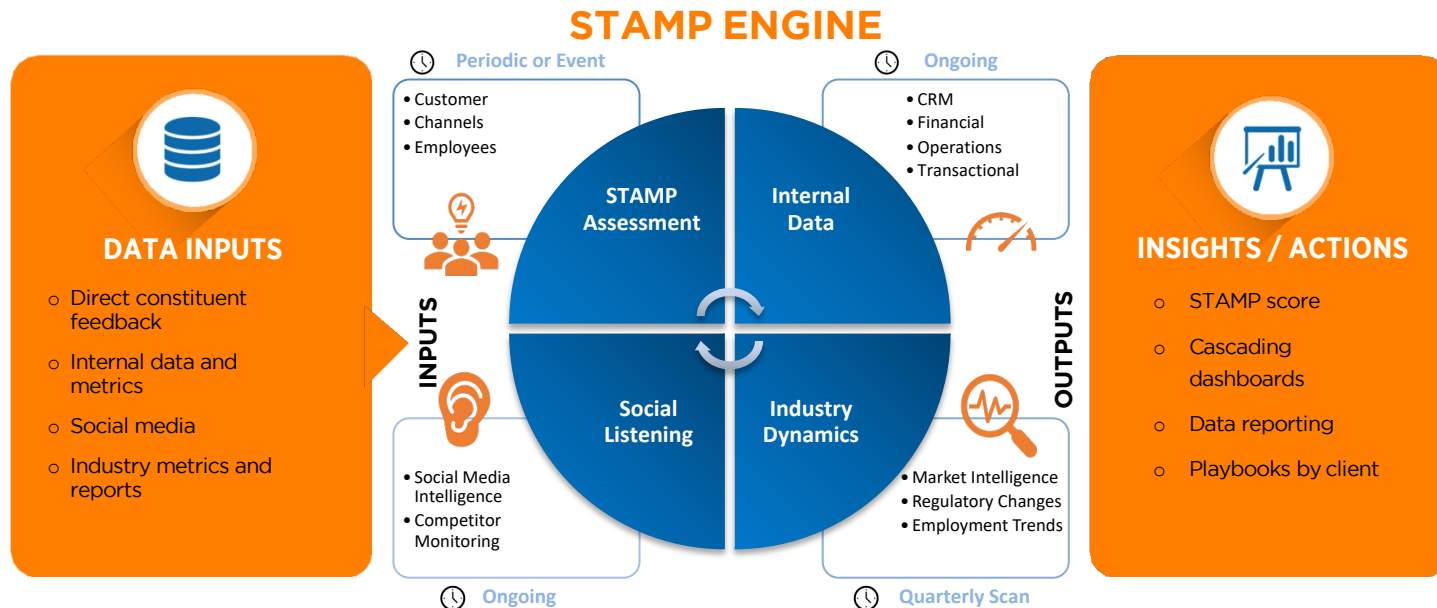
*The STAMP Retention Automation platform assesses B2B **customer sentiment**, significantly improves clients' ability to **retain accounts**, increases **recurring revenue**, and maximizes **customer lifetime value**.*

## Helps Clients Systematically...

- ◆ Determine what is most important to each constituent (client, channel, etc.);
- ◆ Measure performance against importance / expectation;
- ◆ Provide real time alerts on under performance against client expectations;
- ◆ Identify key playbook strategies and tactics to improve customer sentiment and retain accounts;
- ◆ Track trends over time with benchmarking against peers and competitors;
- ◆ Integrate additional corporate data, fueling AI-based predictive analytics and continuous learning; and
- ◆ Synchronize with existing Sales/Marketing Automation Platforms.

# STAMP USES AI TO ASSESS EXISTING CUSTOMER DATA WITH OBJECTIVE CUSTOMER FEEDBACK

*STAMP combines objective **customer feedback**, internal **company data**, **social listening** and **industry dynamics** to create actionable insights and playbooks to retain customers. Our IP is predicated on our proprietary AI-based STAMP Score, algorithms to prescribe playbooks, and industry first B2B benchmarks.*



# STAMP ALLOWS YOU TO VIEW RESULTS ON MULTIPLE LEVELS

*STAMP has 4 cascading views, starting at the individual respondent level and rolls up to the company level and segment level. You can also view dashboards at an Account or Sales Manager level.*

## 4 Cascading Views...



**Individual:** Shows the results for each individual respondent



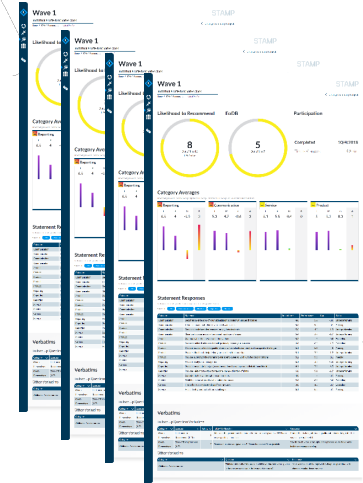
**Client:** Roles individual assessments in to an aggregate company view



**Account Manager:** Provides a dashboard view by account or sales manager enabling you to see how well each account owner is delivering against the needs of their book of business.



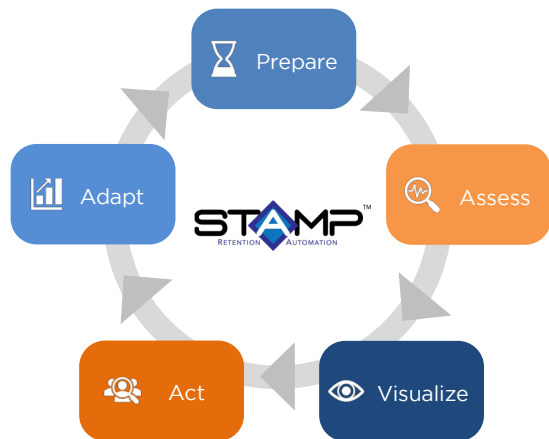
**Segment:** Aggregates companies together with like characteristics to view segments (e.g. by region, by company size, etc.)



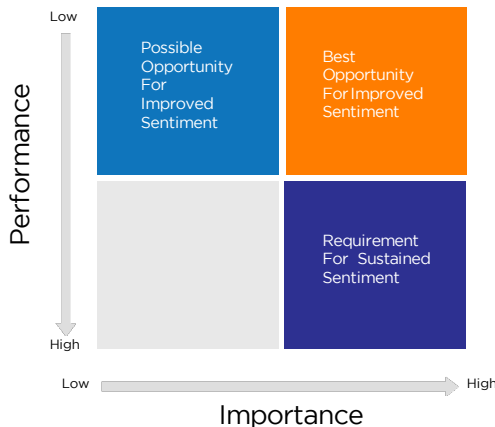
# STAMP PLAYBOOKS TELL CLIENTS WHAT TO DO WITH THE DATA THEY RECEIVE

*The Playbook specifically addresses actions to be taken coming out of the visualization phase - namely those that importance is high and performance is low. **ACT** addresses clients/account managers on alert status. **ADAPT** addresses cross client issues.*

## CUSTOMER RETENTION CYCLE



## IMPORTANCE / PERFORMANCE GRID



## PLAYBOOK ACTIONS

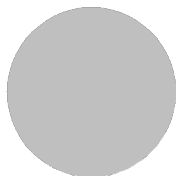
- 1) ACT:** Immediate outreach to clients / account managers that are identified on alert status
- 2) ADAPT:** Pursuit of the top 3-5 strategic initiatives to address issues where clients are underperforming across all customers

# GETTING STARTED ONLY TAKES A FEW HOURS OF TIME

*We guide you through the process so **you spend your time acting on the data, not managing the process.***







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