



MARKETLAUNCHER

SERVICES TO HELP YOU BETTER UNDERSTAND YOUR CLIENTS

Voice of the Customer

Client Quality Assessments,
Win / Loss Analysis and
Market Research



Voice of the Customer Programs

Powered by MarketLauncher

ML's "Voice of the Customer" services are designed to help you better understand the clients you serve and the markets in which they operate so that you can react more quickly to an ever-changing environment.



Director of Strategic Alliances,
Leader in Corporate Learning

"MarketLauncher's process chain from how they begin the engagement all the way through to execution is very professional and their process is impeccable. Others I have worked with will do an abbreviated version of this and call it a day."

It's impossible to know too much about your clients. Having an in-depth understanding of their unique points of view drives results in multiple areas:

- ▶ Improve retention and minimize churn.
- ▶ Influence your go-to-market strategy.
- ▶ Affect your product or service roadmap.
- ▶ Identify new revenue streams.

How you take your products or services to market is likely to keep evolving in the years ahead. Understanding the needs of your client base and the strengths and weaknesses in your sales process today can make all the difference in how you thrive tomorrow.



Turn Clients into Fans

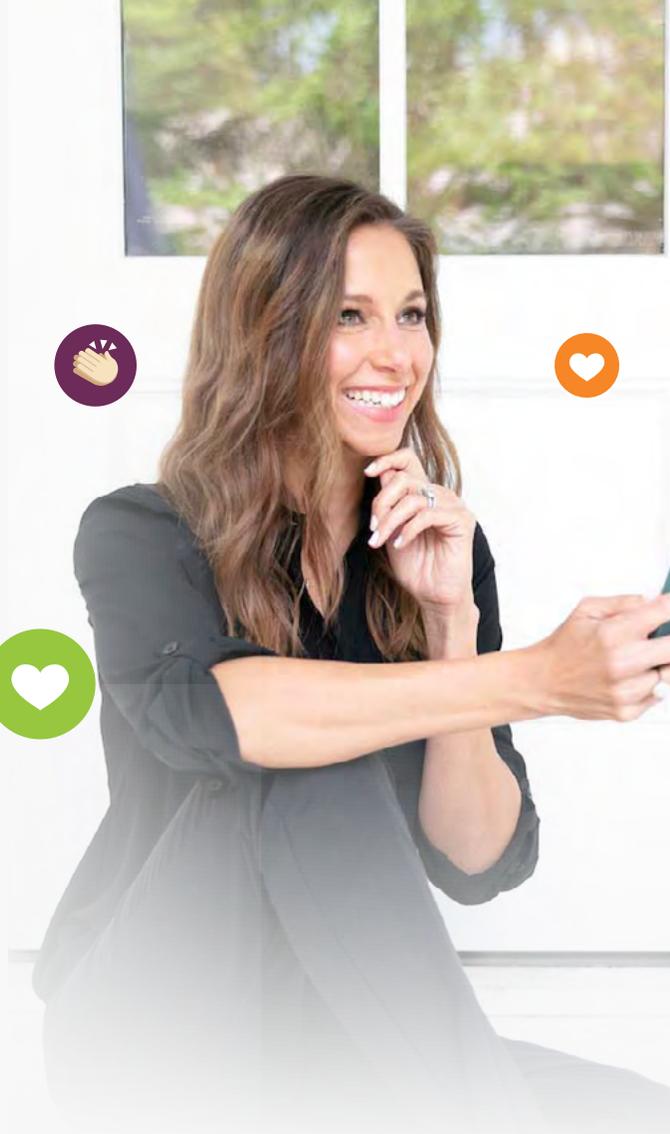
ML has conducted client quality assessments, win/loss interviews, and market research for over two decades.

Our experience has shown that a neutral third party can have more success getting actionable intel versus having someone who owns the relationship attempting to initiate these conversations.

Our Methodology

Using a neutral outside firm like ML helps ensure you get open and honest feedback.

- ▶ Give your contacts the space to speak openly and offer their personal perspective on what keeps them up at night.
- ▶ Course correct quickly in areas where you may have been unaware you were falling short of expectations.
- ▶ Better understand how your competitors are perceived.
- ▶ Use insights to create content that your customers will value, giving you an advantage over other thought leaders and your competitors.
- ▶ Make data driven decisions concerning your product or services roadmap including new functionality or market expansion.



“The ML team has a great ability to get our customers on the phone and engage with them to get the information we need. They also provide quality reporting. We do not have the resources to get this kind of qualitative detail. The interviews we get from Joanne are great.”

– Senior Relationship Manager, Global Risk Management Company



Our Executive Interviewers

ML's Executive Interviewers have conducted thousands of interviews across numerous industry sectors on behalf of ML clients. They are skilled in engaging the interviewee to gain valuable insights while being respectful of their limited time and then reporting back to our clients to share the information obtained in a meaningful manner.



Joanne Strobert has been listening to the Voice of the Customer for ML since 2003. She is particularly skilled at conducting exploratory interviews that help identify unmet needs in the marketplace which our clients then leverage to create new revenue streams. She has extensive Marketing Communications and Sales experience in many industries including professional services, technology and pharmaceuticals.

Fluent in Spanish as well as English, **Mariana Loboguerrero** has been invaluable supporting our international clients. She has subject-matter expertise in engineering and other construction related services, deep knowledge of how non-profit organizations operate, and has conducted interviews across a wide range of industries from medical technology to financial services and cyber security.



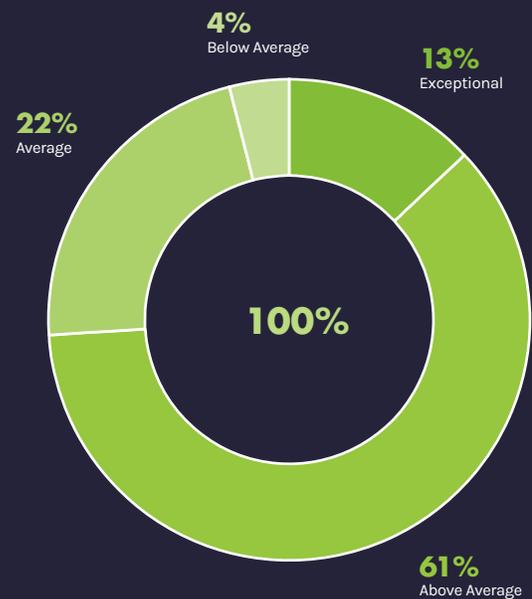
Client Quality Assessments

By conducting interviews with client contacts, the ML team can aggregate important data and provide assessments on a variety of key points that measure overall satisfaction and other elements that could influence your relationship.

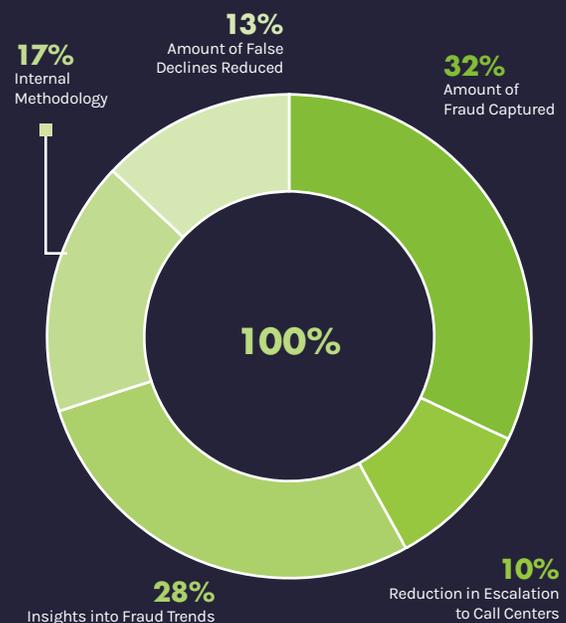
Interview questions are built to meet the particular project and your specific requirements. Some of the basic elements of our interview templates include:

- ▶ Net Promoter Score
- ▶ Customer life cycle insights
- ▶ Potential areas of concern that require immediate attention
- ▶ Opportunities for additional revenue generation
- ▶ Exceptional or lagging employee performance
- ▶ Potential quotes or references for use in sales and marketing efforts
- ▶ Industry trends signaling changes that could affect your business
- ▶ Potential areas of weakness
- ▶ Competitive analysis to protect against threats

Reporting samples from CQA interviews conducted for a leader in behavioral biometric fraud prevention



ROI Measurement



CLIENT STORY

Better Insights Improve an Architectural Design Firm's Five-Year Plan

ML implemented an in-depth Client Quality Assessment survey for an architectural design firm specializing in education, healthcare and corporate interiors.

We surveyed the firm's client base and produced recommendations that became a critical part of the firm's five-year planning initiative.

CLIENT STORY

How the "Voice of the Customer" Helped This Client Gain a More Accurate Assessment of Their Market

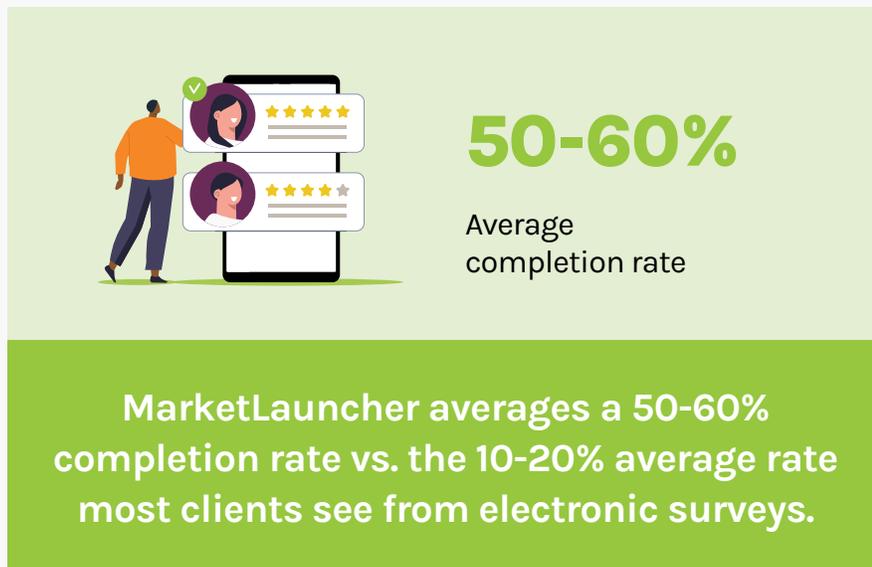
ML conducts Client Quality Assessment interviews on behalf of a global leader and pioneer in risk analysis, compliance and cyber security. The ML team interviews a segment of our client's customer base each quarter to gain insight about the services being provided as well as the customers'

personal insights and feedback on emerging needs and trends.

This intel is then used to better understand how our client can best address the evolving needs of their customer base and ultimately saves them time, effort and money by challenging assumptions and adjusting plans based on the feedback received.



Marketlauncher finds that client interviews conducted by phone rather than electronically garner a much higher completion rate.



The opportunity to speak directly to customers one-on-one provides a way to probe on responses to reveal a far more robust view of the customers' perceptions.

The two-way interaction between the customer and interviewer is generally viewed as a more positive customer service-oriented approach than a sterile one-way interaction with an electronic form.

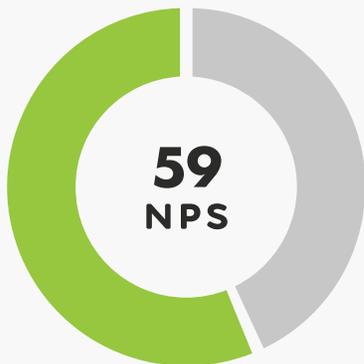
Marketlauncher aggregates all the data into easy-to-digest reports that give the client a summary of what we learned from the interviews. For this specific client, it was important to see the intel compared across two different market segments and to highlight any historical trends.



Examples of Reporting on Key Observations & Historical Trends:

Net Promoter Score (NPS) Market Segment #1

While the NPS score of 59 is good, there was a substantial percentage of neutral responses. This quarter, there were no detractors which helped to increase the NPS in comparison to last quarter.

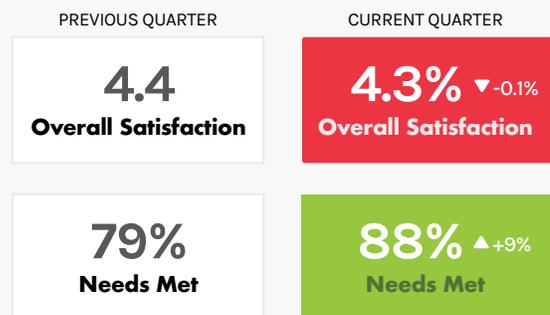


Market Segment #2

There was a larger set of interviews which helped to increase the NPS in comparison to the last quarter due to comparatively less detractors and neutral responses.

Overall Satisfaction Market Segment #1

Decreased slightly since the last quarter from 4.4 to 4.3. However, 88% (vs. 79% last quarter) say reports meet their needs.

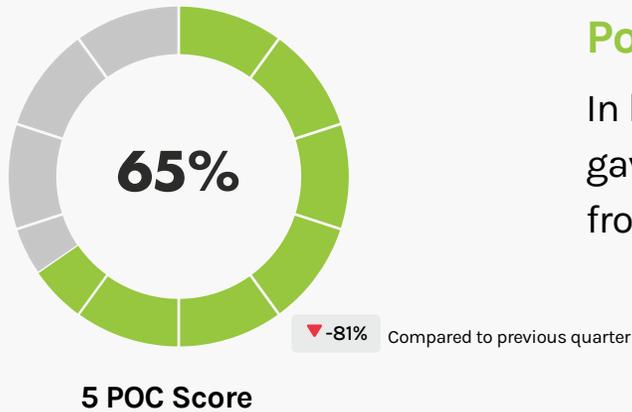


Market Segments #2

Increased slightly from 4.0 to 4.1, and 83% gave a 4 rating or higher (up from 60% last quarter).



Market Segments #1 and #2



Point of Contact (POC)

In both Market Segments, 65% gave the POC a 5. This is down from 81% in the last quarter.

Areas Identified for Improvement

Market Segment #1

- Report Layout
- Overall Quality

Market Segment #2

- Set Up
- Delivery
- Training

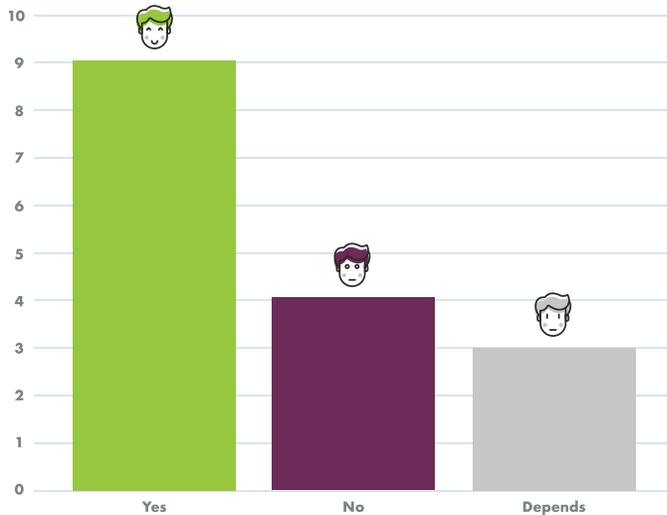
“ML does a very good job for us. They operate on a high level and the program is helpful in a sense that an independent party is doing this analysis for us in a format that is easy for our team to digest. Our Client Services Manager does a really good job of summarizing at an executive level what we need to know, as well as providing the intel behind it.”

- Global Leader in Risk Analysis, Compliance and Cyber Security



Data Capture - Examples

Would you recommend our client over other providers you have used; and if so, why?



YES: I would recommend your client over any of the competition.

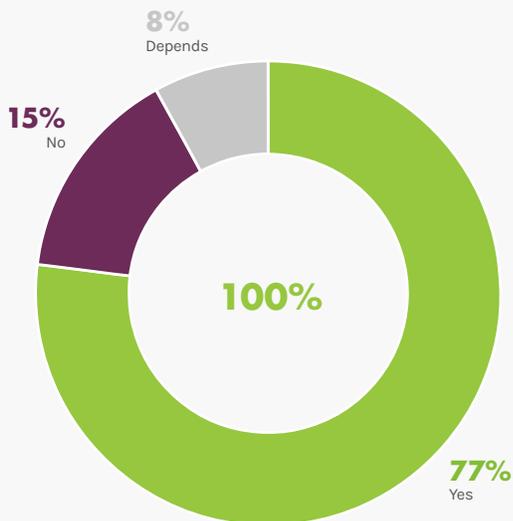


NO: I would recommend others over your client. Quotes from others are consistently lower in cost for same quality.

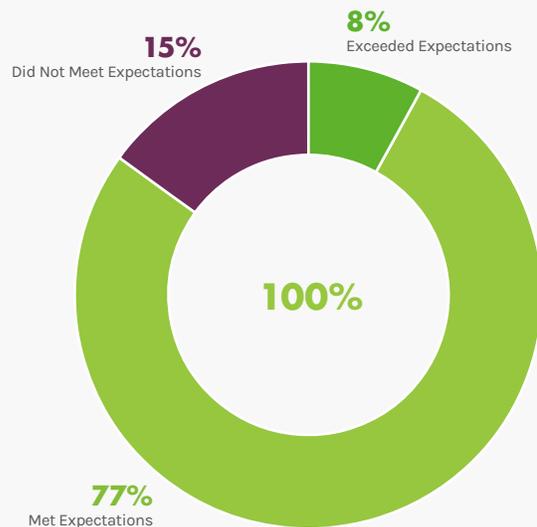


DEPENDS: I have gotten quicker turnaround time from others and would recommend over your client when speed matters.

Does the portal provide a good workflow?



Does the compliance portal meet expectations?





Win/Loss Analysis

In a Win/Loss Analysis, the ML team collects data directly from your buyers and lost prospects. This data not only helps you better understand why your sales team is securing or losing deals, but also gives insight into your company's position in the marketplace, and how your offering compares to your competitors'.

Our proven Win/Loss Analysis methodology collects intel directly from your buyers to understand why companies chose to buy or not buy, identifies areas for opportunity, and gathers intelligence on lost bids to strengthen future positioning.

We gather actionable intelligence our clients need to make decisions regarding process, product offering, pricing and market positioning – all while creating a customer-service oriented first or last impression.

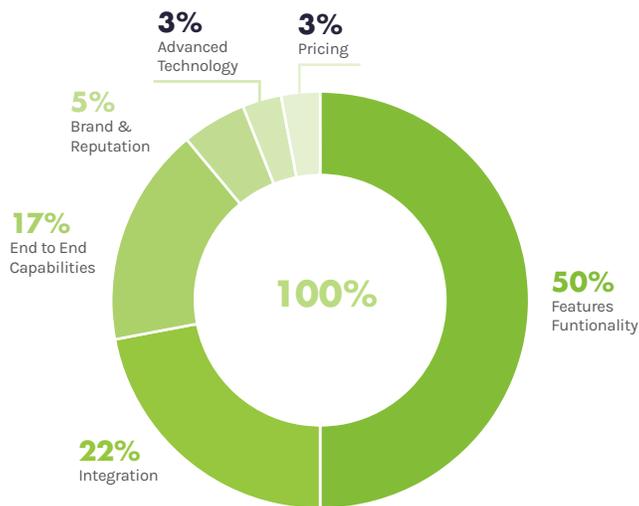
Our position as a neutral third party assists us in gathering objective win/loss data that can:

- ▶ Identify strengths to exploit
- ▶ Pinpoint weaknesses to improve
- ▶ Capture competitive intelligence
- ▶ Identify opportunities for new services or product development
- ▶ Solidify relationships with new clients
- ▶ Improve sales and marketing processes
- ▶ Provide insight regarding effectiveness of marketing programs and collateral
- ▶ Improve new business close rates
- ▶ Influence client retention and / or satisfaction

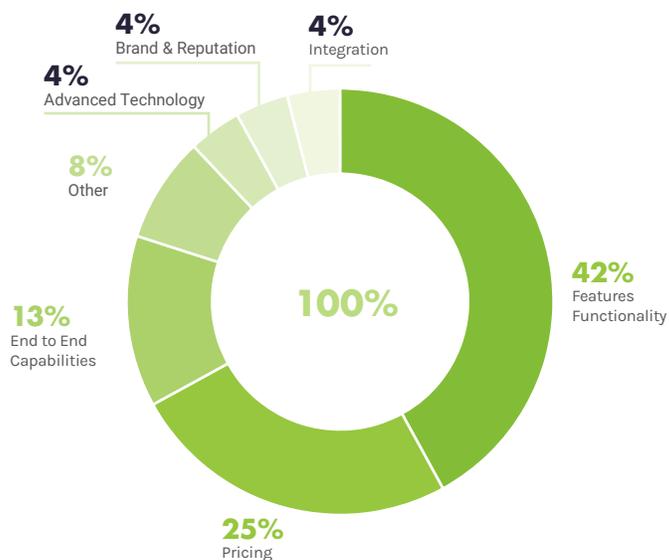


Reporting Samples from Win/Loss Interviews Conducted for an ERP Solution

Most Important Criteria in Decision to Select [CLIENT]



Most Important Criteria in Decision to NOT Select [CLIENT]



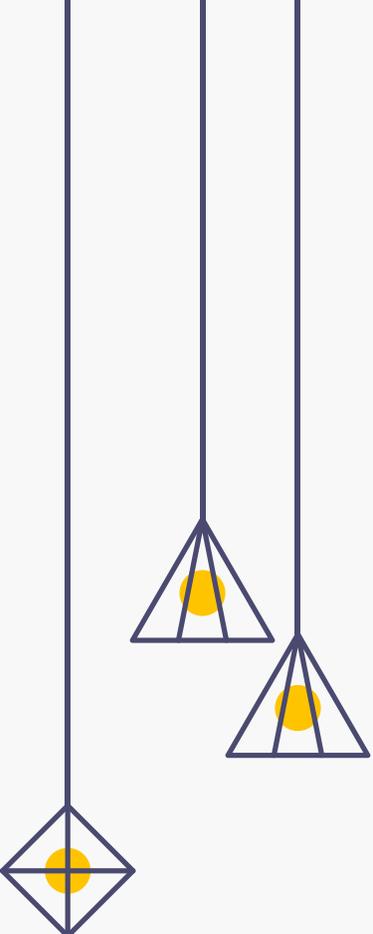
CLIENT STORY

Influencing Company Wide Initiatives

ML implemented an ongoing win/loss evaluation program on behalf of an auditing firm. Each year, the ML team interviewed all recent new client wins and losses, aggregating all of the key findings into market intelligence reports which compared and contrasted each year's data.

The client used these results to establish new annual initiatives designed to impact brand perception and new business acquisition rates.





CLIENT STORY

Spotting Trends Early to Effectively Respond

A niche-industry provider of a technology solution designed to manage finance and operations engaged ML to conduct win/loss analysis services over a 10-year period, interviewing new clients as well as lost prospects on a quarterly cycle.

Upon completion of each cycle, ML provided a report with detailed findings. In addition, an annual comparison of the aggregate data was provided so that trends could be identified, and improvements benchmarked and monitored.



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Market Research Services

ML's Market Research Services include capturing and analyzing market intelligence to assess the needs of a target market. Speaking with potential buyers allows you to capture the kind of intel that will help identify and influence your best go-to-market strategy.

Our Market Research Services are designed to:

- Assess the market's needs, pain points, and drivers
- Gain competitive insights
- Explore market appetite and pricing strategies
- Evaluate brand awareness
- Identify potential partnerships
- Explore new growth verticals or geographies
- Assess market viability and potential

ML provides Market Assessment reports that assist clients in answering key questions related to growth strategies while simultaneously identifying

new business opportunities.

By using the ML team to conduct initial research, our clients are able to obtain critical information while sales and executive teams focus on delivering their core service.

Many of ML's long-term clients have come to us when they want to explore new markets. In the architecture, engineering and design space, we have helped top firms like AECOM and Kimley Horn evaluate new geographic markets for expansion.

We've also helped many companies across multiple industries explore new markets to identify emerging needs. Well-known brands like J.D. Power & Associates, Harvard Business School Publishing and Philips Healthcare have trusted our team to interface with decision makers and influencers to capture intel that guides strategic growth initiatives.



Reviving Dormant Accounts

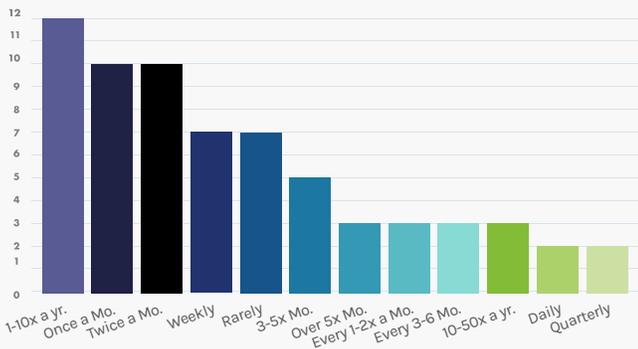
The ML team conducted an outreach campaign to healthcare professionals who had gone dormant in the referral network of a leading innovator in medical alert services. The goal was to re-engage, collect information that would help the client improve the referral process, and introduce new stakeholders to the client’s product.

The ML team conducted 148 interviews with healthcare providers in the client’s network and collected data to better understand the full market potential, referral method preferences, obstacles and opportunities.

As a result of the outreach and interviews, we added 500+ new referrers to the program which led to 1,200+ new product fulfillments within two years.

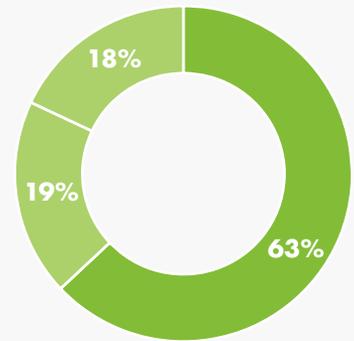
Some of the intel collected:

How often do you make a direct referral?

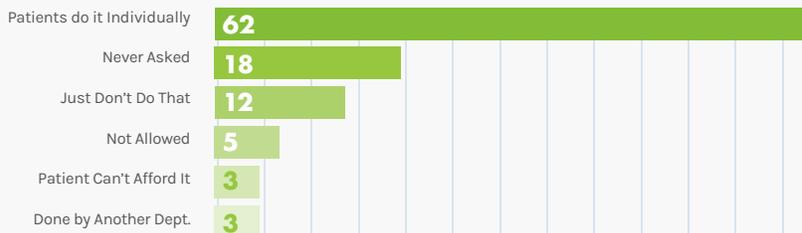


What is your preferred method of making a referral?

- Combo of Conversation & Literature
- Conversation
- Hand Literature



What prevents you from making a direct or live referral?





CLIENT STORY

Launching a New Service Offering

In 2002, ML helped a government, risk and compliance software provider launch their Sarbanes-Oxley solution. The pilot program focused on gathering market intelligence to allow this venture-backed firm to establish a viable forecast and better understand the competitive landscape. Simultaneous to the market research effort, the pilot program was designed to identify prospects with the highest probability to convert to sales opportunities.

As a result of the market assessment, the client set a two-year forecast, and ML continued to pursue this finite market until the team had reached over 60% of the total viable prospects. After establishing significant market penetration because of this effort, the company was acquired by Wolters Kluwer.



CLIENT STORY

Market Assessment for New Service Offering

ML conducted an assessment to evaluate market readiness for an engineering firm's proposed construction advisory services. Interviews were conducted with 35% of the total addressable market.

Data was gathered and analyzed to provide a comprehensive market assessment, including recommendations and strategies for bringing the service offering to market.

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CLIENT STORY

Accelerate Into New Markets

ML helped a global engineering and software provider to the electric utility industry kick start their release of a new product offering and secured appointments for the sales team. In addition, ML collected data from the market to help the client forecast future sales potential.

A market assessment report was produced that included findings from the pilot effort. These were used to help determine what kind of scenarios were best linked to potential interest in the client's new product offering.



Expanding Into the Federal Government Market

A civil engineering firm was looking to proactively grow their Federal contract opportunities. ML was hired to identify the following:

1. Which federal agencies hired civil engineers?
2. What were the important details of the contracting process to consider?
3. Who were the key decision makers within each agency's branches/divisions/locations?
4. Were there upcoming opportunities that required our client's specific capabilities?

ML built a comprehensive list of target agencies and contacts within each office. Interviews were conducted to gather market intelligence. An eighty-four page “How the Federal Government Hires Civil Engineers” report was developed that included the identification of immediate opportunities as well as an outline of longer-term strategies.



CLIENT STORY

Geographic Expansion

When an Orlando-based civil engineering firm began to consider a geographic expansion, ML conducted a comprehensive assessment of the public and private sector to provide the client with key indicators relative to growth in selected markets.

Based on the comprehensive market assessment provided by ML, the client began seeking an acquisition in a targeted area and significantly increased their national footprint.



CLIENT STORY

Essential Mindset of Current Customers

ML helped a developer of diagnostic solutions understand the essential mindset of its current customers. The ML team accomplished the following.

REACH

72%

- ▶ Reached 72% of the customers by phone who were willing to participate in the interview.

HIGHER THAN FORECASTED

+18%

- ▶ Conducted 18% more interviews than originally forecasted.

NEW CONTACTS

100

- ▶ Appended customer data to add over 100 new physician contacts at existing client practices. This resulted in a leverageable asset for the Customer Success Team.

IDENTIFIED CUSTOMER SATISFACTION



- ▶ Identified both satisfied and dissatisfied active customers which allowed the client's customer success team the opportunity to save existing customers, improve engagement, educate about additional offerings, uncover advocacy quotes, position joint marketing activities and address billing issues.





CLIENT STORY

Competitive Assessment

A niche software solution client came to ML for better market research and a true, in-depth look at the strengths and weaknesses of their key competitor.

To compile meaningful, firsthand information, we conducted interviews with buyers to gauge satisfaction with their current solution. We segmented the target audience by category, department, and decision maker, and created customized outreach for each.

This segmentation allowed us to provide a more comprehensive analysis of our interview findings, providing intel by category specific

to the competitor's perceived strengths and weaknesses.

We then identified competitor strengths and weaknesses as well as potential gaps for our client to exploit in their product roadmap and go-to-market strategy.

This is a real example of how ML data can help make marketing strategies more effective.





Key Themes & Observations

Snapshot of Key Learnings

The ML team took the information collected from the market interviews and provided an overall summary of the key themes and observations.

Buyers interviewed have been using the competitor's software for 4 to 20 years.

Competitor's Most Common Positive: **Strong Support**

- Good training
- Strong customer support
- Online university
- Large knowledge base for workarounds

Competitor's Most Common Negative: **Cumbersome**

- Cumbersome
- Not user friendly
- Counterintuitive
- Lots of steps and workarounds
- Merged
- Buggy
- Bolted on piece
- Quirky

- Not responding screen
- Slow
- Not comprehensive
- Very dated
- Not graphically attractive
- Not web-designed

Why not change?: **Learning Curve and Growing Pains**

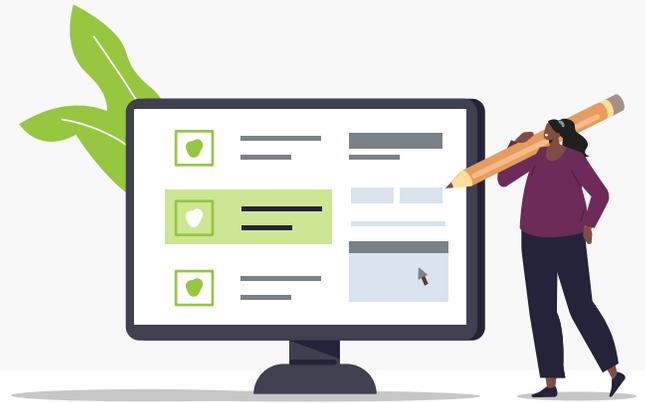
- Not unsatisfied enough to go through that pain again
- Too difficult to change while working on projects
- Too long of a learning curve

What would interest you to change:

- Ease of use in reporting / ability to customize
- Increased field visibility/ accessibility
- Show ROI benefit
- Comprehensive bidding software package
- Strong estimating package
- Web-based - accessible anywhere
- Integrated - input one place and carries over



Market Assessment



A full-service infrastructure engineering firm was looking to expand a particular service into a new geographic market. They retained ML to conduct a market comparison to help them determine which market represented their best opportunity for growth and what factors needed to be considered when crafting their go-to-market strategy.

Three states were chosen for analysis. ML conducted research to identify the target audience for each. We then segmented a representative sample of decision makers and influencers in each market for outreach to address the following questions:

- ▶ Was there a viable need or appetite for the client's service?
- ▶ What did the selection process include?
- ▶ What were the requirements for performing the service?
- ▶ What was the level of brand awareness?

As part of the outreach program, the ML team built in a strategy designed to raise brand awareness while engaged in the interview process.

ML's specialized research uncovered this engineering firm's best opportunities for growth. Our findings provided a roadmap to show where the client should best focus their resources to pursue market penetration.



Observations Summary

Through our extensive research, we were able to get valuable information for individual markets and summarize the averages to help our clients find the best place to focus their resources to increase their market penetration.

Aware of our Client in State	48%
Hire Bridge Engineering Consultants (frequently or sometimes)	83%
Require Local Presence	30%
Open to Work with New Firm	82%
Top Factor in Selection Criteria	Past Project Experience
Top Criteria % Importance	54%
Active or Fair for Complex Bridge Work	50%

	MARKET 1	MARKET 2	MARKET 3
Aware of our Client in State	25%	55%	50%
Hire Bridge Engineering Consultants (frequently or sometimes)	75%	90%	75%
Require Local Presence	25%	30%	33%
Open to Work with New Firm	75%	90%	90%
Top Factor in Selection Criteria	Past Project Experience	Past Project Experience	Past Project Experience
Top Criteria % Importance	80%	50%	50%
Active or Fair for Complex Bridge Work	62%	45%	50%



Increase Penetration Into a Top Tier Account

ML helped this client (a provider of consulting services to the Aerospace and Defense industry) improve its penetration into an important top tier account. Our client engaged us to uncover intel including:

- ▶ Perception of our client and awareness of their offerings
- ▶ Quality assessment of the prior work done by our client
- ▶ Competitive landscape / possible barriers to entry
- ▶ Future work potential / possible areas of opportunity
- ▶ Likelihood of using our client for future needs

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Summary

Based on responses, our team identified three areas where stakeholders indicated there was a gap in capabilities where they felt they were currently underserved.

These gaps represent opportunities for our client to educate the various divisions within this target account about their capabilities.

Specific opportunities were identified in Competitive Analysis Program Management Integration and Master Plan and Master Schedule.

We asked the interviewees if they'd consider working with our client in the future. A little over half (52%) said they would consider it.

Of the ones who would not consider it, half said it was because decisions were not made at their level and the other half said it was because they don't outsource. Only one respondent indicated they would not consider it because they prefer their current provider.



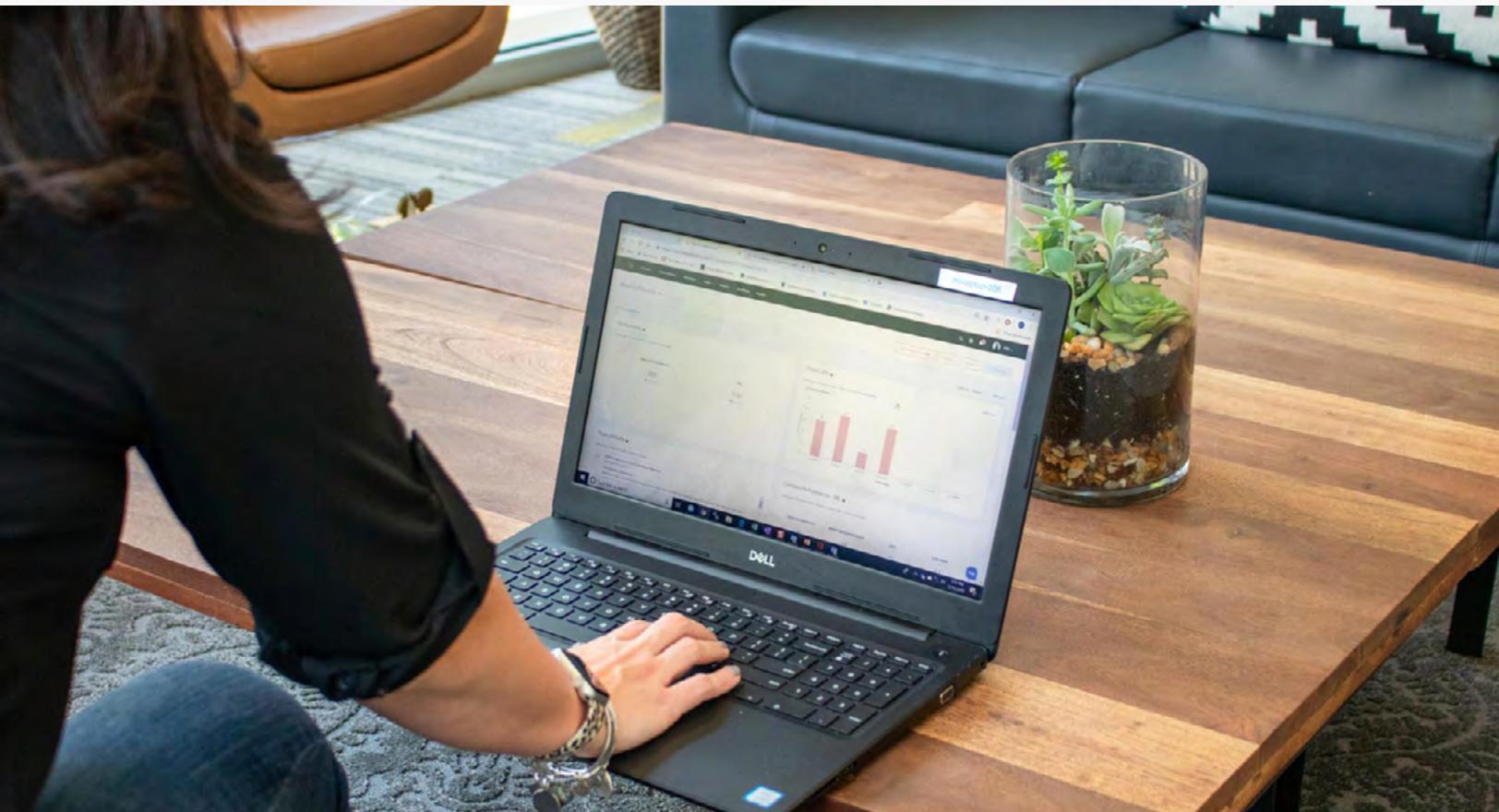
Reporting & Analysis

Included in Every Engagement

ML includes a deep analysis of the data and regular reporting for every project we conduct.

A weekly snapshot report with an aggregate of the data that is collected on every connection gives you regular visibility into who is engaging and the intel our team is collecting.

We also provide a monthly analysis on key insights that have been collected to date, and a comprehensive assessment report is presented upon conclusion with actionable recommendations.





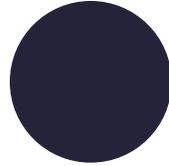
“We selected MarketLauncher to conduct our ongoing assessment surveys because of the way they approached the strategy; they really worked to understand our business and what we’re trying to accomplish. We found after the pilot, which was quite successful at discovering needs, that we may not be meeting with our customers often enough. We also discovered during the pilot that we are meeting the needs of certain sets of customers, but not others.

“On an ongoing basis, the MarketLauncher program has given us qualitative information that we can use to understand both sides; our losses and wins, how our constituents are thinking, what’s on their minds in their own words. That’s valuable data for us.

“Now that we’re in our second year of collecting this data, we’re seeing the trend lines. As we make improvements the trend lines improve in certain areas. In an evolving and changing marketplace, this allows us to react to those trends and make modifications.”

-Product Market Manager, ERP Software





About MarketLauncher

Our seasoned experts get you in front of the right decision-makers. ML is typically the cost equivalent of one high-end salesperson. However, our team approach means our clients receive an unrivaled combination of expertise across multiple disciplines related to top-of-funnel sales development, providing more bandwidth than one individual ever could.

If you would like to learn more about MarketLauncher and how we can help you achieve your lead development goals, visit us at www.marketlauncher.com.

