

Increase Sales with Better Customer Service

**Bookmark
905**



**Duncan
Jones**



**Tom
Ingram**

Client Name
Withheld to
Protect
Confidentiality

**\$12 Billion
Manufacturer
of Electronic
Connectors**

**\$216 Million Gross
Profit Increase
Expected over 5
Years from Improved
Customer Service***

**\$9.8 Million Cost
Savings Expected
Over 5 Years, Will
Cover Cost of Big
Salesforce Project**

**\$9 Million in Gross
Profit by Shortening
Hot Lead
Process from 40 to 6
Steps for \$30,000**

**\$5.6 Million Gross
Profit from Improved
Warm Lead
Handoff to
Distributors**

**Grew Margins to
33.5% in Commodity
Business**

**\$144,000/year Saved
from Reducing
Agent Wait Times by
6 Minutes/day for 125
agents**

**\$258,000/year Saved
by Automating
Complex, Repetitive
Email Tasks,
Implemented in 60
Days**

**Increased Direct
Customers from 150
to 3000 over 5
Years****

**How Results Were Produced,
Some Keys:**



- **"Make Every Customer Service Contact an Opportunity to SELL"** Using **360 View** of customer and related concepts, major progress e.g. **agent knows buying cycles, when likely to order**, always has **special promotions, overstocks, add-on products**, Artificial Intelligence to predict best selling opportunities and customer service needs
- Found dozens of ways to **sustain higher margins through improved service**. E.g. invested in archive of technical specifications for all products acquired in last 30 years
- **"Getting the Right Skills in the Right Agent Serving the Right Customer with Minimum Waste."** Striving toward excellence with Skill Based, Optimized Routing of phone, chat, email service cases, Universal Agent capability (instead of three agent types.)
- **Cases, Needs, Actions Resolved On Time** for internal and external customers (large, ongoing effort with escalation and consequences)
- **Removing the "One Agent to One Customer" staffing and cost problem.**
- **Big improvements in Lead Qualification**
- **"Meet Competitive Price Request"** System to help win deals while protecting margins
- **Rapid deployment of Customer Service Case Management to seven divisions**

[**Click for Full Case Details**](#)

		<p>\$47 Million Gross Profit From “360 View of Customer” Agent Console</p> <p>\$7 Million Gross Profit Expected from Chat-To-Case Improvements</p> <p>\$9 Million Gross Profit Expected from Lead Qualification Improvement</p> <p>\$6 Million Gross Profit Expected from Customer Self Service Improvement</p> <p>\$9 Million Gross Profit Expected from Increased Lead Sources</p> <p>\$7 Million Gross Profit Expected from Pricing Quoting Improvements</p> <p>\$8 Million Gross Profit Expected from Resolving “Case Black Hole Problem”</p> <p>\$7 Million Gross Profit Expected from Voice Technology Improvements</p> <p>*Conservative 5 year estimate, gross margins and cost, by business analyst with Client provided data ** True results disguised due to sensitive nature of issue</p>	
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<p>Bookmark 906.1</p>  <p>Craig Taylor</p>	 <p>(Computer Science Corp)</p>	<p>Led \$550 million Healthcare Software Business Turnaround</p> <p>Before: \$475 million revenue, 15% loss for previous two years</p> <p>After: \$550 million revenue, 15% profit in 30 months</p> <p>Best financial performance of 26 business units for CSC</p>	<p>Four Large Acquisitions</p> <p>Five Smaller Acquisitions</p> <p>Business spanned 50 countries, 5 continents, 4000 customers, 3,000 employees</p> <p>Accomplished by removing non-performing units and investing in the remaining units for profits and growth</p>
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<p>Bookmark 906.2</p>  <p>Craig Taylor</p>	 <p>(Mobile Applications)</p>	<p>Grew from \$16 million revenue, \$1 million loss to \$44 million in revenue, 35% gross margin and \$14 million contribution margin in 18 months</p>	<p>Accomplished through Customer Focus</p>
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<p>Bookmark 906.3</p>  <p>Craig Taylor</p>	 <p>Sabre Travel Services</p>	<p>EVP Responsible for \$850 million P&L of Software and Professional Services</p> <p>36% Gross Margins</p>	<p>Pandemic prevented growing business and role as expected</p>
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Bookmark 907



Dave Davis



Tektronix
Inet
(IP and Mobile
Monitoring Swr / Hwr)

For 20 years,
rising through
VP, GM,
President and
CEO roles, sold
and delivered
systems
to **AT&T,**
Vodafone,
Verizon, Orange,
American
Mobile,
Comcast, China
Mobile,
Bouygues,
Singtel and
Telus.

Grew revenues
to \$350 million
at 20% EBITDA
in 6 years for
software and
hardware
monitoring,
video, data,
audio and IP
business.

- **Strategy**
resulted in #1
market share

- **For**
AT&T: Won 3G
monitoring,
displaced
Agilent (by HP)

- **For**
Verizon: Won
LTE monitoring,
displaced
Agilent

- **For**
Vodafone: Won
3G monitoring,
displaced
Agilent



- **Grew profits**
15% in 2009,
2010

MOVED AWAY FROM
DEPENDENCE ON A
FEW POWERFUL
CUSTOMERS.

Before: Two accounts
provided 63% of
revenues. 24 smaller
accounts provided 37%

- **After: Two**
accounts
provided 25%
of
revenues. 200
other accounts
provided
75% in two
years

		<p>- Grew revenues from \$95 million to \$195 million with 400% increase in operating income in four years for network management and surveillance systems</p> <p>- Attained Danaher 20/20 Club: Sustained 20% Growth with 20% EBITDA</p>	
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<p>Bookmark 908</p>		<p>In 27 years with Jack Henry, rose to President, produced outstanding results:</p>	<p>\$14 billion Market Value on \$876 million invested capital in 2021</p>
	<p>Financial Services Software</p>	<p>- Highest sustained profits and market value on low invested capital of any company studied (Two-time winner in Tom Ingram and Associates studies of 427 software companies)</p>	<p>Strong, Consistent Profit over 25 Years = Sustained High Market Value</p>
<p>Alex Johnson</p>		<p>- 500% ROI 1995 to 2005</p>	<p>Profitable 46 years in a row – 1976 to 2022</p>
		<p>- 300% ROI 2012 to 2021</p>	<p>Transitioned to 90% Recurring Revenue by 2021 (SaaS subscription based software) while maintaining profits</p>
			<p>Strategy based on High Value for Customer as sustainable competitive advantage</p>
			<p>Software Sells Services. Service margins higher after transition to recurring revenue</p>
			<p>Sustained focus on customer excellence</p>

		<ul style="list-style-type: none">- 22% avg Net Profit 1995 to 2005- 27% Revenue Growth from 1995 to 2005 including significant acquisitions- Earnings Average 14% during the "Tech Bust", 2001 to 2006	<p>Sells for highest price among competitors, occasionally loses on price, happy about it</p> <p>Software/Services Mix: 56% services in 2005.</p> <p>SG&A 11% of revenues in 2020</p> <p>Not distracted by stock price, quarterly earnings, cash-out dream</p> <p>Stopped selling to IT dept – sell to line executives with a significant problem and a budget</p>
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