



JOURNEYTEAM

CUSTOMER SUCCESS STORY



BASIC
RESEARCH®



CUSTOMER SUCCESS STORY

Basic Research is an award-winning, multimillion-dollar organization with top products in the weight-loss, bodybuilding, anti-aging, joint health, and skin-care industries.

Scope of the Project

- Call-Pop (& IVR Menu)
- Caller (Contact) Verification
- Order Generation
- Payment Processing
- Subscription and Membership Management
- ERP Integration (Invoice and Status Updates)
- Full Integration of Sales and Marketing

The Challenge



COMPANY CHALLENGE #1 - VISIBILITY

Basic Research needed a fully integrated view of their customers journey throughout the buying process. They wanted a solution that showed a consumers first impression, to purchase, all the way through the conversion to becoming a lifetime customer.



COMPANY CHALLENGE #2 - COMMUNICATION

A big challenge at Basic Research was the inability to reach customers with the proper channel, (*retail, phone, web, SMS, social, etc.*) This inefficiency lead to lost leads, opportunities, and sales. The company was working with siloed technologies that did not allow departments to have a common understanding of customer demographics and sociographics.



COMPANY CHALLENGE #3 - MAXIMIZING MARKETING AND SALES BUDGETS

Data is the electricity that runs an organization and Basic Research struggled to measure the success and failures of marketing campaigns. The organization would continually spend money inefficiently. They needed an alignment of marketing spends to data and positive outcomes.





CUSTOMER SUCCESS STORY

"JourneyTEAM came through and provided us with an end-to-end solution. The task wasn't easy... but they listened to our needs and got the job done."



Rick Velasquez,
CTO Basic Research

25%+

Reduced 'Call to Order' process

20%

Reduced Overall Costs by 20%

70%

Increase in Customer Service Response

-10

Reduced the Need of Admin Headcount

3X

Increased Digital Marketing Channel Leads

The Solution

MICROSOFT DYNAMICS 365 CRM

- Develop a integrated Customer Relationship Management (CRM) system. Incorporated SharePoint, Workflow processes, Marketing Automation and InContact (Telephony software) into the CRM system. (12-week go-live).

CALL-POP

- Leveraged D365 and inContact and linked call data to order data.

CRM AND ERP INTEGRATION

- Invoice updates and statues updates based on shipping.

BUSINESS PROCESS REVIEW

- JourneyTEAM lead and developed numerous "discovery" processes.
- Wrote and edited several versions of the requirements document.

PAYMENT PROCESSING AND QUOTES

- Integrated payment processing, authorization, and verified payments.
- Set up a quoting system to "stage" data for checks and balances.
- 'Quote it Before you Buy it' ability to process payment before order.

DATA COLLECTION

- Single repository for collection of data and reporting metrics used in: Predictive Tools, Forecasts, Projects, Metrics
- Improved demographic visibility with Dynamics Customer Insights.

