



A “Stories That Sell” Teleclass:

Writing a Compelling Customer Story – Start to Finish

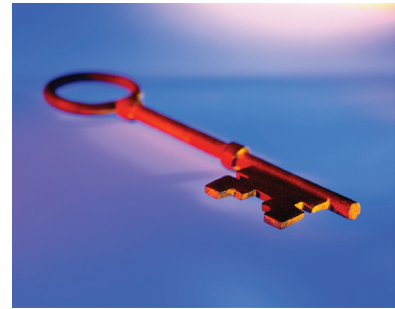
April 7 & 9, 2009

Part II

The Key Messages

The marketing contact at ScheduleGenius stressed that the story, ideally, should touch on these themes:

- 1. A solid return on investment**
- 2. Integration with the company's payroll solution**
- 3. Customizability of the software**
- 4. Built-in rules to prevent employees from working overtime**



The interview hit all of these points, giving us rich information for the story. As we craft the story, these four main ideas become our story “chunks,” or cornerstones.

What's the Angle?

Each case study should focus on an angle of value to the vendor company. Ideally, ScheduleGenius should have stories across its various industry targets and stories that address all the top needs and concerns of its prospective customers. The angle that emerged from this customer interview:

- Staff efficiency and cost-savings as a result of easier scheduling, and time and attendance tracking.

Other customer success stories for ScheduleGenius have focused on these themes: employee satisfaction and retention, complying with union rules, reducing costs due to overtime, etc.

The Feature Story Format

Customer stories have traditionally followed a format of Challenge-Solution-Results, with those sub-headings. There's also often a Customer Profile section at the beginning. It's a perfectly valid format and a tried-and-true way to organization a story.

However, the story itself does not need to be structured with those specific headings and subheads. In fact, descriptive headlines and subheads allow readers to skim the information for the main ideas.

A customer story that follows a feature-story format resembles a feature story you might see in a magazine.

Here's an example of a success story in a feature format:

Breakdown of the Customer Story: Feature–Story Format

The story gets rolling immediately after the headline.

The customer story still follows the same flow of Customer-Challenge-Solution-Results, but with descriptive subheads instead.

Descriptive subheads allow readers to understand the basics when just skimming.

Again, a powerful quote that speaks to benefits.

The story ends with a powerful quote.

Company:
Oregon Winery

Industry:
Winemaking

Solution:
Shipping and payment automation solutions

The Results:

- The winery runs multiple orders at once-cutting processing time from about 10 minutes down to less than 30 seconds per order.
- The ability to run multiple charges at once allowed the winery to negotiate lower transaction fees with its merchant services provider, which saves thousands annually.
- The winery prepares wine club shipments in two days instead of two weeks, and avoided having to add two full-time staff to handle the club orders.
- Savings on labor costs and credit card fees paid for the solutions the first week.

Winery Blends Shipping and Payment Software to Expedite Wine Orders

With a spirit of adventure and a passion for making world-class wine, Bob and Sue Sorensen launched Oregon Winery in the Willamette Valley in 1970. One of the first to recognize the region's value for winemaking, the winemaker has become internationally acclaimed for its Pinot Noir, Chardonnay, Pinot Gris, Pinot Blanc, Arneis, Dolcetto and White Riesling.

Today, under the second generation of leadership, the winery produces about 17,000 cases per year and is growing quickly. With direct sales via phone, the site or at retail locations-expanding by 25-30% per year for the past few years, the company needs more effective way to keep up with customers' specific requests and preferences, as well as help in expediting orders. The winery might send 10 shipments a day during low season, and up to 40 during high season.

Manual Shipping Becomes Unmanageable

Shipping volume reaches its highest during quarterly distributions to members of the wine club. In just a couple of years, the club has grown from 70 to 700. Previously, the winemaker struggled through a manual order fulfillment process, spending about two weeks every quarter preparing and shipping orders to club members. Each order could take more than 10 minutes of staff time to process.

"It was getting unmanageable to have just a list of customers and manual processing," said Sue Sorensen, President. "We deal with a lot of customers daily and we need to make sure we treat them more on a personal basis, remembering details like what kinds of wines they like, and ensuring that they receive their shipments on time."

Shipping & Payment Processing in One Click

When Oregon Winery selected its CRM solution, it chose to implement integrated shipping and payment processing software from XYZ Software to expedite order fulfillment. Now it's just a couple of clicks to share information across the whole system.

"There are lots of products out there that are custom-made for wine clubs or PUS centers," Sorensen explained. "But we wanted a solution that would integrate with everything else we were doing—all our accounting systems, web orders, CRM and shipping. We liked XYZ Software because they integrate really well with our CRM software, and make it quicker to get orders out and cards charged."

Employees simply go to the customer's account record in the CRM software, and with the click of a button the order is processed end to end: the system automatically calculates the total, charges the credit card using, and triggers the shipping application to print the shipping label. The system also emails the tracking number to the customer and stores the tracking number in CRM history. All this processing is automatic once the user triggers the order processing

track in the CRM system. There are no more clicks through and no cutting and pasting.

Thanks to the tight CRM integration, off-site staff are productive. Employees at the wine bar or at home can process orders.

The Sorensens are particularly impressed with the system's reliability when it's needed most. "The payment processing work every time. It's reliable, stable, easy to use and transparent. We just make sure it's on, and that's about it."

Saving Thousands on Merchant Fees, Labor Costs

With an automated process handling credit card charges and shipping preparation, the vineyard runs multiple orders at once-cutting processing time from about 10 minutes down to less than 30 seconds per order. The merchant services supported by payment processing software helped the vineyard save thousands of dollars a year on merchant fees.

"The time and money we save with shipping and payment automation probably add up to two full-time people. The software paid for itself the first week."

— Sue Sorensen, President, Oregon Winery

Now at 700 members, and growing every day, the wine club has become much more manageable. Shipping and payment processing software tap into customers' shipping preferences and financial information in the CRM software to process orders. Sue Sorensen estimates that the winery would have had to bring on extra staff to handle the growing wine club.

"We're able to get a handle on our wine club now," she said. "Every time we do it, the list is larger. What used to take maybe two weeks, now we can do in two days."

Savings on labor costs and credit card fees drove an almost-immediate return on investment. "The time and money we save with shipping and payment automation probably add up to two full-time people," Sorensen said. "The software paid for itself the first week."

The Story “Lead”

The lead in any story is the introduction, the very first sentence or paragraph. It literally leads the reader into the case study. In a feature-story format, you have the opportunity to kick off the story with an engaging, relevant lead.

For comparison, let’s look at a lead in a traditional format versus a feature format.

Traditional lead:

Customer Profile

The Desert Arena is home to the Desert Rattlers NBA team, and host to about 120 sports and entertainment events every year. Built in 1996, the Arena seats 20,000 people and includes 40 skyboxes for private use. Artists from throughout the southwest contributed the murals and sculptures to showcase the spirit of the region. Desert Arena is the premier sports and entertainment venue for the metropolitan area.

Feature lead:

Imagine putting on an event for 20,000 guests – the food and drinks, promotion, ticket sales, ushers, souvenirs, cleaning, and more. At the Desert Arena, it takes a team of hundreds to bring it all together.

The feature lead already begins getting into the story – that it takes a lot of people to make an event happen smoothly. The second paragraph, and subsequent story, provides more description about the customer.

Paragraph two of feature format:

Each year, the Desert Arena hosts about 120 events. As home to the Desert Rattlers and local college basketball teams, the arena hosts, on average, two events every week. During basketball season, that can be every day. Sometimes that means quickly transforming the basketball court into an ice floor.

Introducing the “Challenge”

After orienting the reader to the featured customer, quickly get into information about the customer’s challenge. Ideally, the reader will see his own challenges reflected in those of the featured customer.

In a 2-page case study or success story, this will take three to four paragraphs usually.

The Desert Rattlers officially manage and operate the arena. In this dynamic staffing environment, the guest relations team for the Desert Rattlers found manual scheduling and time-tracking extremely inefficient. Monthly scheduling took days to complete.



“In scheduling hundreds of part-time people, we had to understand quickly who could work when and where,” said Claudia Emerson, director of guest relations. “Managing it on an Excel spreadsheet was pretty time-consuming. I want to make sure everyone has an equal chance to work, but doing it manually, it was hard to see if one person got more shifts than another.”

Likewise, the staff had to transfer hours and pay rates after each event from paper into the computer, which took four to five hours.

The quote:

Try to integrate the first customer quote into the challenge area, so the customer explains the problem in her own words, with her own emotion.

Notice that the quote is not verbatim what Claudia said, however it’s still basically in her voice with the phrases she used. The created quote pairs her phrases but not necessarily in the precise order she said them.

This differs from journalism where quotes are exact. However, because Claudia will read and approve this story, it is acceptable to edit quotes. If quotes are basically what the customer said, most customers do not realize that they have been changed. If they disagree, they have full license to edit.

Introducing the Solution

Follow details about the customer’s challenge with the solution that was applied to the problem.

The decision

Surveys indicate that buyers want to know how other companies make purchase decisions. Did they look at other solutions and why did they choose this one?

Emerson and the staff evaluated various scheduling solutions before selecting ScheduleGenius. Most importantly, the ability to customize the software would allow the Rattlers to accommodate different types of shifts, some hourly and some not. In particular, the conversion department – those who change the basketball floor to different configurations – is paid by type of shift.

“Our employees are not working regular hours Monday through Friday,” Emerson said. “ScheduleGenius listened to our needs, and both the software and the company were flexible to our specific requirements.”

The basics of the solution’s use

If the solution is technology-related, ease of implementation might be important, as well as discussion about training and ease of use. For this story, customization of the software was integral to solving the customer’s needs.

A ScheduleGenius consultant configured the software to track shifts in the conversion department by half or full shifts, while other employees are paid by the hour at various rates. The Desert Rattlers set up other business rules in ScheduleGenius, such as notifications when an employee has worked 30 hours in a week, helping the staff prevent overtime.

Additionally, ScheduleGenius ties into the arena’s hand scanner, pulling attendance data right into the software. From there, it integrates with ADP to bring data over for payroll processing.

Six Desert Rattlers departments access ScheduleGenius: guest relations, premium services, the conversion department, facility services, engineering and the box office. ScheduleGenius stores availability and day/time preferences for all employees, who are required to be 90 percent available. As employees call in with changes to availability, staff can easily update that data in an employee’s record.

How the Customer Benefits

From there, go further in detail in a couple of subsections about how the customer uses the product. Readers don’t want too much detail about features, but touch on some of the functionality that drives benefits for the featured customer.

Here, you’re setting up for mentioning measurable results, so readers know what’s behind those measurable results.

Presenting Measurable Results

When we present measurable results here, we encapsulate those benefits into a powerful quote that will become the “feature” quote highlighted on the story. This feature quote should hit on the #1 benefit the customer experienced.

With significantly faster scheduling and processing of attendance, the guest relations team actually saves one full-time position previously dedicated to scheduling.

“We saved a whole position by streamlining scheduling, reducing our costs by more than \$30,000 annually,” Emerson added. “Those savings easily return four times our investment in ScheduleGenius.”

The customer contact did not say that the savings “return four times the investment in ScheduleGenius.” However, this is true. We added this to show return on investment. The customer then approved the addition of that line.

Tip: Stay Journalistic

The purpose of a customer case study or success story is to SHOW, not tell. You’re presenting facts, though they are facts that strongly support the vendor’s product. The case study is the proof that the buyer is looking for, so you don’t need to make a lot of big claims with lofty adjectives in the copy.

However, customer quotes are different. That’s where the opinion comes into the story. Customer quotes are the place for any superlative language, if there’s any at all; the customer has a lot more credibility than the vendor. If the customer actually said it, it’s not the vendor making big claims about the solution.

Ending the Success Story Gracefully

You can end a customer story in a few different ways:

- **A powerful quote** – Choose a customer quote that powerfully sums up the customer’s experience or results.
- **A look at the future** – Talk about next steps for the customer with the solution, such as rolling out new features, taking it to more departments or users, etc.
- **A wrap-up** – Summarize the story and the benefits the customer saw, and tie this summary back to how the customer solved the challenge stated early in the story.



Headlines that Serve as Signposts

It’s important to create a customer story that’s skimmable, so that casual readers can glean the main ideas. However, some will choose to read every word.

Descriptive headlines and subheads are one of the ways to create a skimmable success story. I usually write the complete story before adding in my headline and subheads.

Headline

Your headline should speak to the main benefit that the customer realized – ideally a measurable result. You can choose to create a headline that plays off the subject matter of the story, but only if you use a subhead with more description.

ScheduleGenius a Slam Dunk for Desert Rattlers

Automated Scheduling Saves One Full-Time Position

Subheads

The story has four subheads throughout. Each subhead represents one of the four key messages (chunks) the company identified as important:

Flexible, Automated Scheduling Solution

Safeguards against Overtime

Payroll Data in 15 Minutes, Not 4-5 Hours

Saving \$30,000 Plus

The subheads tell a story for skimmers. Of course, they don’t always have to mirror your key messages exactly. You won’t always have 4 key messages and 4 sections to subhead. But in general, try to use those subheads for your most important points.

Completed Success Story – Word Version

A ScheduleGenius Success Story

ScheduleGenius a Slam Dunk for Desert Rattlers

Automated Scheduling Saves One Full-Time Position

Key message #1: solid return on investment

[featured quote]

“We saved a whole position by streamlining scheduling, reducing our costs by more than \$30,000 annually. Those savings easily return four times our investment in ScheduleGenius.”

Key message #1

Claudia Emerson, Director of Guest Relations, Desert Rattlers

[sidebar]

Solution Review

Company

Desert Rattlers and Desert Arena

Challenges

Manual scheduling and time and attendance tracking were time-consuming for the Desert Rattlers’ guest relations team, which manages 120 events per year in the 20,000-seat Desert Arena.

Solution

ScheduleGenius simplifies and expedites scheduling for 550 employees. Integrating with a hand scanner and the company’s ADP payroll system streamlines post-event work.

Key message #2: Integration with ADP and the hand scanner

Benefits

- The staff saves one full-time position as a result of scheduling efficiency with ScheduleGenius.
- After events, attendance data is ready for the finance department in 15 minutes, instead of 4-5 hours as before.
- Employees call an automated line for schedules, reducing calls to live staff.
- Eliminating manual practices improves payroll accuracy.

Key message #1

Imagine putting on an event for 20,000 guests – the food and drinks, promotion, ticket sales, ushers, souvenirs, cleaning, and more. At the Desert Arena, it takes a team of hundreds to bring it all together.

Each year, the Desert Arena hosts about 120 events. As home to the Desert Rattlers and local college basketball teams, the arena hosts, on average, two events every week. During basketball season, that can be every day. Sometimes that means quickly transforming the basketball court into an ice floor.

The Desert Rattlers officially manage and operate the arena. In this dynamic staffing environment, the guest relations team for the Desert Rattlers found manual scheduling and time-tracking extremely inefficient. Monthly scheduling took days to complete.

“In scheduling hundreds of part-time people, we had to understand quickly who could work when and where,” said Claudia Emerson, director of guest relations. “Managing it on an Excel spreadsheet was pretty time-consuming. I want to make sure everyone has an equal chance to work, but doing it manually, it was hard to see if one person got more shifts than another.”

Likewise, the staff had to transfer hours and pay rates after each event from paper into the computer, which took four to five hours.

Flexible, Automated Scheduling Solution

Emerson and the staff evaluated various scheduling solutions before selecting ScheduleGenius. Most importantly, the ability to customize the software would allow the Rattlers to accommodate different types of shifts, some hourly and some not. In particular, the conversion department – those who change the basketball floor to different configurations – is paid by type of shift.

← Key message #3

“Our employees are not working regular hours Monday through Friday,” Emerson said. “ScheduleGenius listened to our needs, and both the software and the company were flexible to our specific requirements.”

← Key message #3: customizability of the solution

A ScheduleGenius consultant configured the software to track shifts in the conversion department by half or full shifts, while other employees are paid by the hour at various rates. The Desert Rattlers also configured ScheduleGenius to notify users automatically when an employee has worked 30 hours in a week, helping the staff prevent overtime proactively.

← Key message #4: preventing overtime

Additionally, ScheduleGenius ties into the arena’s hand scanner, pulling attendance data right into the software. From there, it integrates with ADP to bring data over for payroll processing.

← Key message #2

Safeguards against Overtime

Six Desert Rattlers departments access ScheduleGenius: guest relations, premium services, the conversion department, facility services, engineering and the box office. ScheduleGenius stores availability and day/time preferences for all employees, who are required to be 90 percent available. As employees call in with changes to availability, staff can easily update that data in an employee’s record.

← Key message #4

For each event, the staff begins with a master template of the schedule. With the easy-to-use interface, they quickly fill in shifts with employees based on when and where people are able to work. ScheduleGenius ensures that they only schedule employees at times they can work, equitably, and that they never go over 30 hours per week per employee.

← Key message #4

The ease of creating schedules in the software now enables the staff to build schedules every two weeks instead of monthly, which benefits employees. That information is immediately available for employees, who call in to retrieve their schedules via the automated ScheduleGenius phone module. To retrieve schedules previously, they checked email, called the office or physically came by the facility.

Employees also know their responsibilities for each shift beforehand, allowing them to go straight to the uniform room and to the correct briefing area.

“The process is a lot smoother and clearer for employees,” Emerson said. “They don’t need to come to the building to see a calendar of events or check email. They can always pick up the phone and know their shifts two weeks in advance, so they can plan better.”

Payroll Data in 15 Minutes, Not 4-5 Hours

← Key message #2

The guest relations department taps into reporting in ScheduleGenius to improve scheduling. They can evaluate which employees are requesting a certain number of days off, and reach out to those not giving 90 percent availability. Before each event, the team runs lists for supervisors showing all the employees working in their area that night.

At the close of an event, the staff immediately has attendance data from the integrated hand scanner. Before, it took up to five hours to hand-enter it, which left room for error. Now, it takes just 15 minutes to check over data and send it on to the finance department for processing. Guest relations staff also know the staffing costs associated with an event right after the event closes.

← Key message #2

Beyond speed, automating the collection of attendance data ensures that the organization pays employees for exactly the time they worked.

“Taking manual data entry out of time tracking contributes to accuracy,” Emerson said. “If we’re off by a couple of minutes, people are losing money. ScheduleGenius has really worked for us because the pay rate, hours and pay are accurate.”

Saving \$30,000 Plus

With significantly faster scheduling and processing of attendance, the guest relations team actually saves one full-time position previously dedicated to scheduling.

← Key message #1

“We saved a whole position by streamlining scheduling, reducing our costs by more than \$30,000 annually,” Emerson added. “Those savings easily return four times our investment in ScheduleGenius.”

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As the Desert Rattlers use increasingly more of the capabilities of ScheduleGenius, they realize even greater efficiency.

“Managing such a large group is hard, but the more you put into the system, the more it works for you. I would never ever go back to the old way,” Emerson said.

The Story in Layout

Page 1:

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Safeguards against Overtime
Six Desert Rattlers departments access ScheduleGenius: guest relations, premium

The Story in Layout

Page 2:

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More information on customer stories, including the *Stories That Sell* blog, book, e-tip of the Month, articles and more:

www.storiesthatsellguide.com

www.compelling-cases.com

Success-Story Marketing LinkedIn Group (www.linkedin.com)

Stories That Sell LinkedIn Group - created specifically for course participants
(www.linkedin.com)

Twitter: casey_hibbard