

Holy Crap – We Made a Sale! Now What Do We Do?

Understanding Cradle-to-Grave Customer Fulfillment!

During our tenure supporting early-stage ventures, we're amazed at how often clients overlook the importance of planning a well-engineered customer fulfillment operation. Immense effort is poured into product design, pricing strategy, promotion, and prospect development. But when the first deal is finally closed, and the sales bell is rung, there always seems to be a loud celebration, followed by a collective "[Hush]... Now what do we do?"

The simple fact is that many start-ups don't spend a lot of time planning effective customer fulfillment -- not even timely delivery. In truth, making a sale and closing a deal represents only 50% of your market validation and venture success. Delivering seamless customer fulfillment and flawless service are what will keep you in business. Don't make the mistake of thinking your job is done the day customer payment hits your bank account. Your long-term success will be determined the day your product lands in the hands of your customer, and every day following where you offer genuine value-add service. In short, your job is never finished. You will always be judged -- against past efforts, and your competition. So you better aim for exceptional standards in delivery. Because your brand, reputation, client testimonials, publishable case-studies, recurring revenues, future referrals, and general "stickiness" are based entirely on how well you execute on your value proposition and promised outcomes -- products or services alike. From cradle-to-grave.

**Don't Stop When the Cheque Hits the Bank. Your Job is Never Done.
Fulfillment is On-Going. You're Always Being Judged**

ENGINEERING CUSTOMER FULFILLMENT - A STEP-BY-STEP ANALYSIS

So how do you design an effective customer fulfillment program? You must conduct a step-by-step analysis of a "single sale" through every facet of your operation -- back end and front end. In truth, it's an extremely simple exercise. But it's not always done. All it takes is for you to ask some straightforward questions about your internal policies and procedures across each function. Here's a sample of what to consider:

Contacting Your Service Team

- Is it easy to reach a service representative at your company? Do you publish a departmental directory?
- What means can a prospect or customer use to contact you? Email? Phone? Submission Form? Live Chat?
- What's the turnaround time on responses? Does it meet client requirements and expectations?
- What about technical services? Do your customers need 24/7 support? Are you providing it?
- If you were a customer of your own company, and you had an urgent issue, would you feel you were getting timely service? Or would you find your company frustrating to work with? [APPLY THE GOLDEN RULE.]

Order-Taking / Deal-Signing

- How do you administratively take an order? By phone? By email? Via internet submission form?
- Do you have a simple means to build an entire customer account with all relative contact details?
- Are you prepared to issue a formal quote and/or register a purchasing order (where applicable)?
- Are your orders centralized through a P.O.S. system or an E.R.P. system, or both?
- How does the P.O.S. system tie into your C.R.M. and accounting systems (where applicable)?
- If you have contracts with time-sensitive service clauses, where are these logged and scheduled?
- Once an order is received, do you know which departments should be forwarded a copy?
- Have you mapped the journey that an "order" must take through your entire organization?
- What internal procedures does a confirmed order initiate?

Payment Processing & Finance

- How do you take payment? Are you capable of taking cash, cheque, credit card, etc. (where applicable)?
- What do you provide your customer as a receipt/proof-of-payment?
- Is your P.O.S. system tied to your accounting system?
- Do you collect scheduled subscription payments (e.g. SaaS)? How will you facilitate these auto-payments?

- Are payments made according to a schedule of deliverables? If so, how is accounting made aware of these terms and deliverables? What system is used to confirm that collections are now due?
- Who collects scheduled payments? Sales, service or accounting? Can it be automated?

Inventory Management / Manufacturing

- How is your “delivery” or “inventory management” team informed of a deal closure or product order?
- Are you sending orders to a customer fulfillment warehouse or manufacturer? How is this done?
- Do you require integration between your P.O.S. system and E.R.P. system?
- How do you ensure your manufacturing division is made aware of an influx in orders?
- What early-warning systems are in place to ensure raw materials and / or finished product do not run short?
- If you’re a SaaS operation, do you have clearly designed on-boarding protocols (see below)?

Packaging & Delivery

- Do you have the right packaging and shipping solutions in place to deliver single units, and in volume?
- Do you assemble your product? Is it done on-site? Or do you need to relay orders to an external provider?
- Can you “unitize” and pre-package your product offering? Or do you offer your customer some choice in quantities and accessories? If the latter, do you have a “packing team?”
- Do you require a warehousing and shipping operation? If so, is it in-house? Or have you outsourced?
- Can you ship to all relevant markets? Have you researched cross-border logistics and customs work?

On-Boarding/Training

- Do you provide training for your product, service or SaaS application? Do you make video tutorials available?
- Do you have an official on-boarding and orientation program available?
- Should any aspect of on-boarding, training, and orientation be conducted in person?
- How many service hours do you dedicate to early-stage product adoption with new customers?

Post-Sale Service & Fulfillment

- Do you provide dedicated service representatives for your customers? Is this individual the same as the sales representative? If not, do you have an official hand-off protocol?
- Do you schedule a series of service calls to gauge customer satisfaction?
- Do you offer any form or value-added training in best practices?
- Have you scheduled value-added promotions or opportunities for upgrade? Do all of these come at a cost to the customer? Or do you set aside a fixed budget for overall customer fulfillment and satisfaction?
- Does your product require periodic maintenance? If so, how do you schedule maintenance calls?
- What do you do to recognize and appreciate your customers? (Gifts and token “thank you.”)
- Do you offer a warranty program? Is it well communicated? Is there an option for extension?

SURPASS YOUR COMPETITION. REPLICATE THE BRANDS YOU ADMIRE.

Above and beyond an internal analysis of your own customer fulfillment policies and procedures, you should always strive to set benchmarks and standards for your combined team. There are two simple ways to set this bar:

- 1. Surpass The Competition**
- 2. Replicate The Brands You Most Admire**

Again, you are being judged by prospects and existing customers on a daily basis. Your target market is weighing its options all the time. So take a look at the competition, and strive to surpass their approach. Yes – your exact product and service offerings may vary. Ideally, you have a unique differentiator which already gives you a winning edge. But don’t underestimate the “stickiness” of exceptional customer fulfillment and dedicated customer relations. Fresh out of ideas for new ways to achieve higher standards of delivery and service? Then study other brands you personally admire in the markets? And be sure to choose a few outside your immediate industry. Because often winning ideas come from non-conventional places.

Good luck! And let us know how we can help. Contact www.canadastartup.com for your mission critical needs.