

Blue Marble Financial Web-to-print Case Study

Vertical marketing: Professional services (financial planning)

Business Objective: Lead generation and brand management

Services provided: web-to-print, online ordering, printing, mailing and fulfillment services

Challenge

Blue Marble Financial is a financial services company based in Texas that employs 250 sales agents. They have 4 regional offices throughout Texas but many of the agents work from their homes. Each agent is responsible for his/her own marketing efforts and for ensuring they have updated materials. After meeting with a potential client, the agent leaves a package of information so the prospect can review it at their leisure.

One of the challenges Blue Marble was having was an increase in printing costs throughout the company due to the number of changes they were making to their brochures and sales sheets thus resulting in frequent printing reorders. And, outdated materials were just getting thrown out or, worse, were still being used by the agents. Blue Marble wanted more control over their printing and distribution process. They also wanted to improve the effectiveness of their marketing materials to add more clients to their customer-base.

Solution

We introduced Blue Marble to our web-to-print online ordering system and set up an online catalog for all of the sales and marketing materials the agents frequently used as well as identity items such as letterhead, envelopes and business cards. Since all agents are based out of a regional office, we standardized information about these offices within the site to minimize errors on future orders. The online catalog made it easy for the agents to just log onto the system, select the item they needed, customize it with their regional office and/or personal contact information and select the quantity they needed.

Because we are able to print all of the materials on demand as ordered, we helped Blue Marble keep printing costs down and eliminate the cost of storing and disposing of obsolete materials. By setting minimum inventory levels in the system telling us when to reprint, Blue Marble did not run out of anything. Also, the system allows for split shipments so that we can ship directly to each regional office ourselves rather than sending everything to the corporate headquarters and having them incur even more shipping charges forwarding on to their regional offices. Blue Marble also designed a person at each regional office that approved all orders using our Master Buyer feature.

The online catalog also provided the agents with an easy way to send out postcard mailings on a regular basis. Previously, since they are working from home, they had to print labels themselves, affix to pre-printed postcards and affix stamps. Now, they were able to have a custom postcard with their personal contact information printed on it as well as their photo addressed cleanly to each prospect. Along with their postcard order, the agents can attach their mailing list, thus saving more time by having us send out the mailing for them. They now had more time to spend on the phone prospecting.

Results

Blue Marble Financial realized a 10% decrease in company-wide printing costs just within the first 9 months of using our online ordering system. Each regional office maintained a smaller quantity of marketing materials in inventory. Although they reorder more often now, they have very little waste and are able to ensure that their agents are using the most current marketing and sales tools. Real-time reports generated by the system allowed the corporate office to manage spending by cost center (regional office) as well as by product/items ordered. Also, since the agents spend less time ordering materials and doing their own mailings, they have more time for prospecting and closing and Blue Marble is already seeing an increase in their customer acquisition and retention ratios.