

Client Brief



Lead: Rick Berzle
Role: Fractional CMO

Executive Summary

[Intellectual Technology, Inc.](#) (ITI) provides innovative hardware, software and system integration solutions to North American motor vehicle agencies (aka DMVs) to securely issue motor vehicle documents to the public. Using ITI's [self-service terminals and kiosks](#), [distributed printing](#) and [centralized fulfillment services](#), motor vehicle jurisdictions can shorten wait times, increase revenues, and reduce fraud.

Stepping into a part-time, interim CMO role, I worked closely with the President, VP of Operations and CFO to refine the company's positioning and value proposition. We designed and developed all the content for a new website, replaced and updated sales collateral and implemented a CRM (customer relationship management) solution to monitor the deal flow.

Situation

ITI was purchased by [Vicente Capital Partners](#), a Los Angeles Private Equity Firm, in 2012. Although the company was doing well, it wasn't growing at a pace that the stakeholders desired. At the time of our engagement, the company had no B2B marketing professionals on staff.

Relationship selling to DMV directors and attending the [American Association of Motor Vehicle Administrators](#) (AAMVA) events was the primary go-to-market strategy. The company provided sales collateral to support the AAMVA events, developed promotional videos for their kiosks and provided face-to-face demos on customer calls.

Sales collateral didn't adequately reflect the company's value proposition or completeness of their product/service offerings. The company website was hard coded, poorly designed and difficult to update. Content on the site was out-of-date, inconsistent and missing important elements to their story.

Approach

We identified 4 key focus areas to improve sales/marketing operations.

1. Company Positioning/Messaging

We held a positioning workshop to gain consensus on the buyer, influencers, value proposition and competitors. After several iterations we finalized messaging and positioning.

Instead of positioning ITI as a product/services company, we positioned the company as a solution provider for DMVs in four areas: vehicle registrations, drivers licence renewals, vehicle safety inspections and outsourced fulfillment services. This positioned ITI as a more complete partner for N. American DMVs.

2. Updated Sales Tools

We revised the content on all customer facing sales collateral, eliminated some pieces and developed new pieces where it made sense. Most importantly we ensured each piece highlighted customer benefits and messaging was consistent from piece to piece.

3. New Website (ITI4DMV.com)

We redesigned the corporate website and developed new content to reflect the company's new positioning and value proposition. The new site brings a fresh new look to ITI and delivers a broad range of new content that didn't exist on the previous site.



One of the most important outcomes from the website re-design was management's agreement to disclose customer wins and transaction volume, which illustrates customer trust in ITI and the dependability/scalability of ITI solutions.

A few notable additions include:

1. Positioning ITI as thought leader for the DMV-of-the-Future
2. A near-real-time counter that illustrates the volume of DMV document transactions
3. A customer landing page that identifies each state DMV that relies on ITI to issue DMV documents to the public
4. A resource zone that includes all literature/videos and includes an exhaustive FAQ for each solution area.

4. Opportunity Management (CRM/SFA)

At the time of our engagement, the company had no automated tools or defined processes in place to manage deal flow and the sales pipeline. No way to capture deal status, wins and losses.

We took the lead in recommending and procuring a CRM tool, Salesforce.com. As administrator of the system, we initialized the database with known deals and associated contracts and opportunities in the immediate pipeline. We customized the system to map to their sales process and produced custom reports for management and BOD review.

We worked with management to develop a clean customer/prospect database and integrated it with Salesforce.com and a direct email platform, MailChimp.

In addition we promoted and established weekly sales calls with the management team to review sales/marketing status and next steps.

Summary

Working with the ITI management team for 1 year in the capacity of an interim part-time CMO, we had a dramatic effect on the company's perception in the market and with its stakeholders.

Accomplishments:

1. Revised messaging and positioning for the company and products
2. Designed, developed, launched and maintained company website
3. Recommended, procured and set-up Salesforce.com instance
4. Improved sales/marketing communication and processes
5. Established contact/prospect database and email broadcast platform
6. Developed and distributed company's first eNewsletter
7. Proposed content and news calendar and published first press release

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