



## Keep the Clients That Keep Your Business Running

# Account Retention

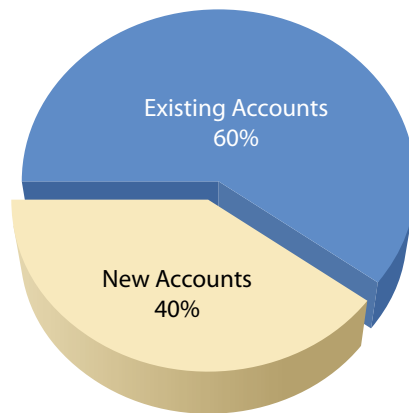
*Developing new customers is important; keeping current customers is vital*

Successful executives know that a loyal customer base is the foundation upon which a profitable organization is built. Trying to replace a lost account wastes valuable time and resources and erodes your profit margin. Loyal customers, on the other hand, generate predictable revenue that improves your company's cash flow and financial stability. Primary Intelligence's Account Retention Analysis is a comprehensive solution that provides your organization with crucial information about why your customers renew or defect, and a scientific, actionable approach to increasing your overall retention rate.

### Customer satisfaction is not enough

Even though they are fundamental to success, many companies don't spend sufficient time understanding how their current customers make the decision to renew, upgrade, or defect. Instead, they focus on customer satisfaction studies that give a simple temperature reading of the client's current mood. These studies overlook one important fact:

### Revenue Source



*Even satisfied customers will switch vendors if they think they can get something better.*

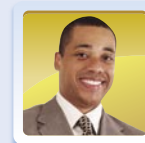
In order to ensure that your customers are not just satisfied but loyal, you must understand not only what your customers want, but what your competitors are promising them. Using a sophisticated interviewing methodology and predictive analytics, Primary Intelligence gathers this information from the key decision mak-

### Account Retention Helps:



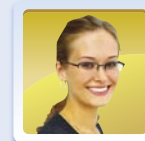
#### Sales Professionals

With the majority of your quota coming from existing clients, the more you know about purchase decisions from this group, the better. Understanding account retention intelligence will help you keep more clients, thus maintaining your quota base.



#### Sales Managers

Just as sales professionals rely on recurring contracts to maintain their quotas, sales managers keep their team's numbers high by re-signing existing customers. Account Retention gives managers the training information they need to improve client retention within their sales group.



#### Marketing

Marketing always tries to target the right message to the right person. Account Retention gives marketing the insight to direct the best message to existing customers. Such fine-tuned messaging improves client retention by emphasizing the points of the product or service that most likely will retain clients and improve contract renewal rates.

ers at companies that have recently gone through the process of deciding to renew or defect from your company. You will be able to learn:

- Why did these companies decide to remain with you or defect?
- Who influenced the decision?
- What factors were the most important influencers in the decision?
- What are the chances of the company returning (or defecting) in the future?

You will receive crucial information on the process these companies went through to make their decisions, as well as a comprehensive report that analyzes significant trends and presents strategic recommendations for improving your account retention strategies. You won't just learn what your customers feel—you'll learn how your customers think and how they make their purchase decisions.

## Understand your competition as well as your customer

Primary Intelligence's Account Retention Analysis provides you with insightful data on your competitors, answering these important questions:

- Who are your customers considering?
- Which competitors are the greatest threats to your accounts?
- How are your competitors trying to win away your accounts?
- What are your customers' perceptions about the competition and the market?

Using this information, you can make strategic choices to prevent future defections, increasing your retention rate and cementing the loyalty of your client base.

## Key Benefits

- Pinpoint the most important influencers in your customer's decision making.
- Identify areas of risk and opportunity.
- Know how competitors are winning accounts from you.
- Develop better-informed strategies for improving loyalty.
- Allocate resources to areas that will have the greatest impact.
- Improve your overall retention rate.

## Precise predictors of success

Unlike customer satisfaction studies, Primary Intelligence's Account Retention Analysis provides impact scores on the 27 key factors (adjusted for industry and solution) that influence whether or not your customers will remain loyal. These scores give you precise predictions regarding how much you can increase your retention rate by improving your

performance in these areas—allowing you to allocate your resources, time, money, and training to those areas that will give you the greatest benefit. This analysis, driven by Primary Intelligence's proprietary predictive analytics engine, presents you with unprecedented clarity of vision concerning your account retention initiatives.

## Optimize training initiatives and sales strategies

Primary Intelligence's Account Retention Analysis is the only solution that gives you a comprehensive understanding of your customers' renewal or defection decisions. Through predictive analytics, you can progress from telling your company, "Our customers are happy," to telling them, "Here is how we can improve our retention rate by 5 percent (or more)." Account Retention Analysis, as a key component of your "voice of the customer" program, provides your organization with the objective data you need to make informed decisions about protecting your accounts and the revenue they generate.

## Primary Intelligence The Client Cycle

Solution-mapping to the needs of the client or prospect.

