

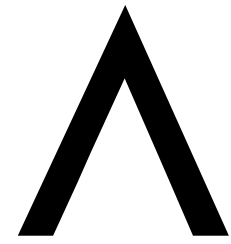
FIXXON

Email Marketing & CRM *proposal.*

Michael Colling-Tuck & Adrian Di Mambro

AGENCY
medical marketing





AIM:

Creating a *digital ecosystem.*

Set up internal email marketing capabilities for Fixxon and support them in executing email marketing campaigns to attract new customers.

VISION:

For Fixxon.

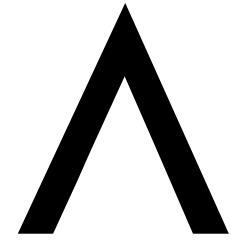
After a three phased project Fixxon will have a marketing ecosystem that supports continuous growth and operational efficiency. Lead generation will be achieved through a well-implemented CRM system and effective email marketing campaigns, ensuring a steady stream of new leads from both new and (if required) existing accounts.

Phase two will see improved customer onboarding facilitated by automated email sequences, providing a supportive experience that boosts customer satisfaction and retention. These sequences will help new accounts with implementation and product adoption, ensuring they derive maximum value from Fixxon's offerings.

Phase three will maintain ongoing engagement with existing customers through monthly emails, offering updates on Fixxon's activities, brand initiatives, and valuable information. This consistent engagement will reinforce brand loyalty and educate customers on product usage and benefits.

Additionally, comprehensive analytics will track who has opened the emails and which articles they have clicked on, enabling Fixxon to identify engagement opportunities. For example, if customers frequently click on an article discussing a common problem, Fixxon will follow up with those accounts to offer additional support or reduce the need for account visits.





OBJECTIVES:

01

Generate new leads:

- Implement a CRM system to streamline lead capture and management.
- Develop and execute email marketing campaigns targeted at new customers.
- Achieve a steady increase in new leads and conversions.

02

Improve customer onboarding:

- Create automated email sequences for new accounts.
- Provide clear guidance and support during the implementation and product adoption phases.
- Enhance customer satisfaction and retention rates through effective onboarding processes.

03

Enhance ongoing customer engagement:

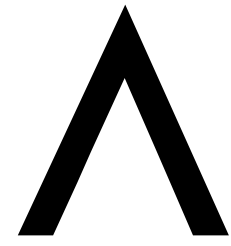
- Establish a regular schedule for monthly email communications to existing customers.
- Share updates on Fixxon's activities, brand initiatives, how-to guides, and valuable information.
- Foster stronger relationships and brand loyalty among existing customers.

04

Enable data-driven analytics:

- Set up comprehensive analytics to track email performance and customer interactions.
- Identify high-engagement opportunities by analysing email open rates and article clicks.
- Utilise data insights to refine marketing strategies and improve customer engagement.





STRATEGY:

To achieve *the objectives.*

The following strategy will be implemented in three key phases:

PHASE 1: CRM SETUP AND INITIAL EMAIL MARKETING CAMPAIGNS

01

CRM implementation:

- Select and implement a CRM system tailored to Fixxon's needs, enabling efficient management of new and existing customer data.
- Import current customer data into the CRM and ensure proper segmentation for targeted marketing efforts.
- Find a method to obtain target stakeholder email addresses; Care Home Managers and Reception Staff.

02

Email marketing campaigns:

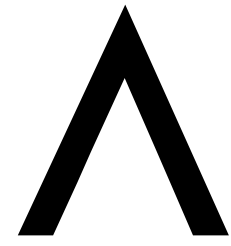
- Develop six initial email shots (e-shots) focused on lead generation and brand awareness.
- Design visually appealing and content-rich emails that highlight Fixxon's value propositions and call-to-action.
- Schedule and execute the email campaigns, ensuring delivery to the target audience at optimal times.

03

Analytics setup:

- Establish analytics tools to track email performance metrics such as open rates, click-through rates, and conversions.
- Integrate analytics with the CRM to provide a comprehensive view of customer interactions and engagement.





STRATEGY:

To achieve *the objectives.*

The following strategy will be implemented in three key phases:

PHASE 2: ENHANCED CUSTOMER ONBOARDING

01

Automated onboarding sequences:

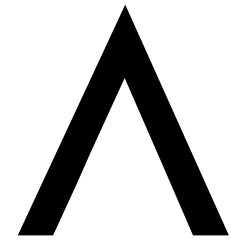
- Create a series of automated onboarding emails for new customers, guiding them through the implementation and product adoption process.
- Include educational content, how-to guides, and support contact information to assist new customers in maximising the value of Fixxon's offerings.

02

Onboarding support:

- Provide additional resources and support to new customers through onboarding sessions.
- Monitor onboarding progress through the CRM and follow up with customers who require additional assistance.





STRATEGY:

To achieve *the objectives*.

The following strategy will be implemented in three key phases:

PHASE 3: ONGOING CUSTOMER ENGAGEMENT AND CONTENT MARKETING

01

Monthly email communications:

- Develop a monthly email newsletter for existing customers, featuring updates on Fixxon's activities, brand initiatives, product tips, and industry insights.
- Highlight customer success stories, new product features, and upcoming events to keep customers informed and engaged.

02

Content creation:

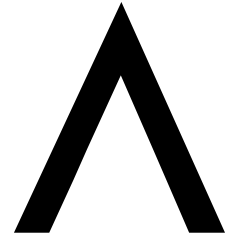
- Produce high-quality content, including blog posts, articles, and videos, to be shared via email and other digital channels.
- Focus on topics that address common customer pain points, provide solutions, and showcase Fixxon's expertise.

03

Engagement analytics:

- Utilise analytics to monitor customer engagement with email content, identifying which articles and topics generate the most interest.
- Follow up with highly engaged customers to offer additional support or explore opportunities for deeper collaboration.





IMPLEMENTATION PLAN

Fixxon *email marketing & CRM.*

The implementation plan will be carried out in three phases, each with specific deliverables and timelines to ensure a structured approach.

PHASE 1: CRM SETUP AND INITIAL EMAIL MARKETING CAMPAIGNS

MONTHS

01-02

CRM implementation:

- Market research and analysis completion.
- Brand strategy workshops and formulation of the brand strategy document.
- A kick-off meeting will be held with all project stakeholders to align on goals and expectations.

Email marketing campaigns:

- Develop six initial e-shots, focusing on lead generation and brand awareness.
- Design and create email templates.
- Schedule and launch the email campaigns.

Analytics setup:

- Integrate analytics tools with the CRM.
- Set up tracking for email performance metrics.

PHASE 2: ENHANCED CUSTOMER ONBOARDING

MONTHS

03-04

Automated onboarding sequences:

- Create and implement automated email sequences for new customers.
- Develop educational content, how-to guides, and support information for the onboarding emails.

Onboarding support:

- Organise onboarding sessions, webinars, and Q&A forums.
- Monitor onboarding progress through the CRM.
- Follow up with customers needing additional assistance.

PHASE 3: ONGOING CUSTOMER ENGAGEMENT AND CONTENT MARKETING

MONTHS

05-06

Monthly email communications:

- Develop a monthly email newsletter for existing customers.
- Include updates on Fixxon's activities, product tips, and industry insights.
- Highlight customer success stories and new product features.

Content creation:

- Produce and distribute high-quality content addressing common customer pain points and showcasing Fixxon's expertise.
- Share content via email and other digital channels.

Engagement Analytics:

- Monitor customer engagement with email content.
- Identify high-interest topics and follow up with engaged customers.
- Use data insights to refine content and marketing strategies.



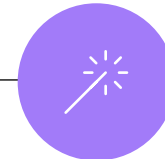
DELIVERABLES

Fixxon *email marketing & CRM.*



CRM Implementation:

A fully operational CRM system with segmented customer data.



Initial Email Marketing Campaigns:

Six e-shots designed and sent to targeted audiences.

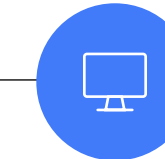
Performance metrics tracked and analysed.



Automated Onboarding Sequences:

A series of automated emails for new customers.

Educational and support content developed and included in the sequences.



Monthly Email Communications:

A template for the monthly newsletter.
Regularly updated content for ongoing customer engagement.



Content Creation:

High-quality articles, blog posts, and videos.

Content distribution plan via email and other digital channels.

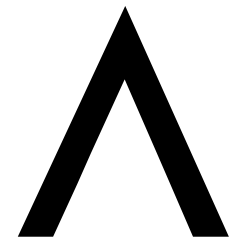


Engagement Analytics:

Detailed analytics reports on email performance and customer engagement.

Actionable insights to improve future marketing efforts.





AGENCY BUDGET

Overall allocation for email marketing & CRM.

To ensure the successful execution of the proposed strategy, we have structured the payment model with an initial setup fee followed by a monthly retainer. This model allows for comprehensive initial setup and continuous support, ensuring sustained growth and efficiency.

SETUP FEE: £5,000 The setup fee covers:

Comprehensive CRM Implementation and Data Migration: Setting up the CRM system tailored to Fixxon's needs and migrating existing customer data.

Full Initial Email Campaign Setup: Development and execution of six initial email shots (e-shots) focused on lead generation and brand awareness.

Extensive Content Creation: Creation of onboarding email sequences, educational content, guides, and videos to support new customers.

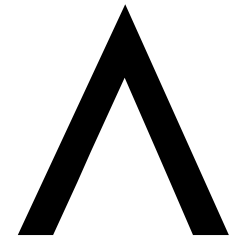
Advanced Analytics Setup and Integration: Establishing analytics tools to track email performance and customer interactions.

List Procurement or Auto Generation: Procuring targeted email lists or using tools like Apollo for auto-generation of leads.

Initial Training Session: Providing training for Fixxon's team on using the CRM and managing email campaigns.

Setup Documentation and Guides: Offering comprehensive documentation to support ongoing use of the CRM and email marketing tools.





MONTHLY RETAINER:

Basic plan: £750/month:

Monthly Newsletter Development and Distribution: Creating and sending a monthly email newsletter to existing customers.

Basic Analytics Reporting: Tracking and reporting on key performance metrics for email campaigns.

Email Campaign Management: Managing up to two email campaigns per month.

Customer Support: Providing ongoing support for troubleshooting and optimisation.

Monthly Strategy Call: Conducting a monthly strategy call to review performance and plan upcoming campaigns.

Content Calendar Development: Developing a content calendar to schedule monthly emails and content creation activities.

MONTHLY RETAINER:

Enhanced plan: £1,500/month:

Includes everything in the Basic Plan.

Additional Content Creation: Producing additional blog posts, articles, and videos.

Advanced Analytics and Reporting: Providing more detailed analytics and performance insights.

Quarterly Strategy Review and Adjustments: Conducting quarterly reviews to adjust strategies based on performance data.

Performance-Based Bonuses: Offering additional services or discounts if certain KPIs are met.

MONTHLY RETAINER:

Ultimate plan: £2,250/month:

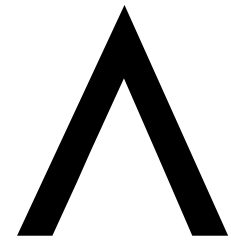
Includes everything in the Enhanced Plan.

Custom Content and Campaign Development: Creating tailored content and marketing campaigns.

Dedicated Account Manager: Assigning a dedicated account manager for continuous support.

Monthly Strategy Sessions and Continuous Optimisation: Conducting in-depth strategy sessions and ongoing optimisation.

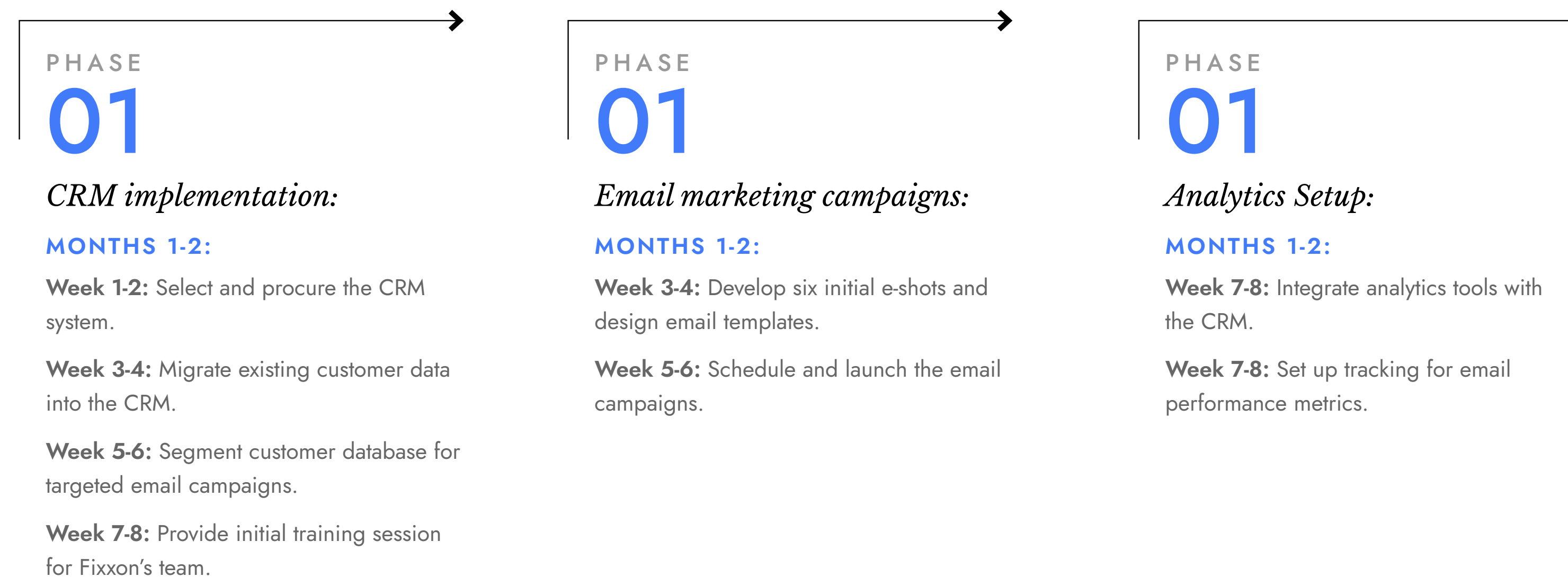
Additional Webinars and Customer Engagement Activities: Organising webinars and other activities to engage customers further.

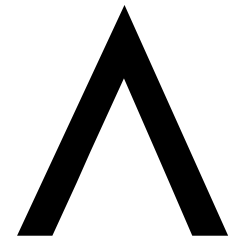


TIMELINE & MILESTONES

The implementation of this project will be carried out in three key phases, each with specific deliverables and timelines to ensure a structured and efficient approach. The timeline outlines the expected duration for each phase, with key milestones to track progress and ensure timely completion.

PHASE 1: CRM SETUP AND INITIAL EMAIL MARKETING CAMPAIGNS





TIMELINE & MILESTONES

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PHASE 2: ENHANCED CUSTOMER ONBOARDING

PHASE

02

Automated onboarding sequences:

MONTHS 3-4:

Week 9-10: Create onboarding email sequences for new customers.

Week 11-12: Develop educational content, how-to guides, and support information.

Week 13-14: Implement automation setup and manage sequences.

PHASE

02

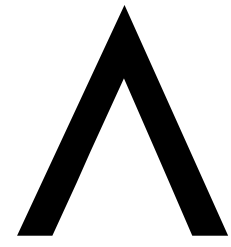
Onboarding support:

MONTHS 3-4:

Week 13-14: Organise onboarding sessions, webinars, and Q&A forums.

Week 15-16: Monitor onboarding progress through the CRM and follow up with customers.

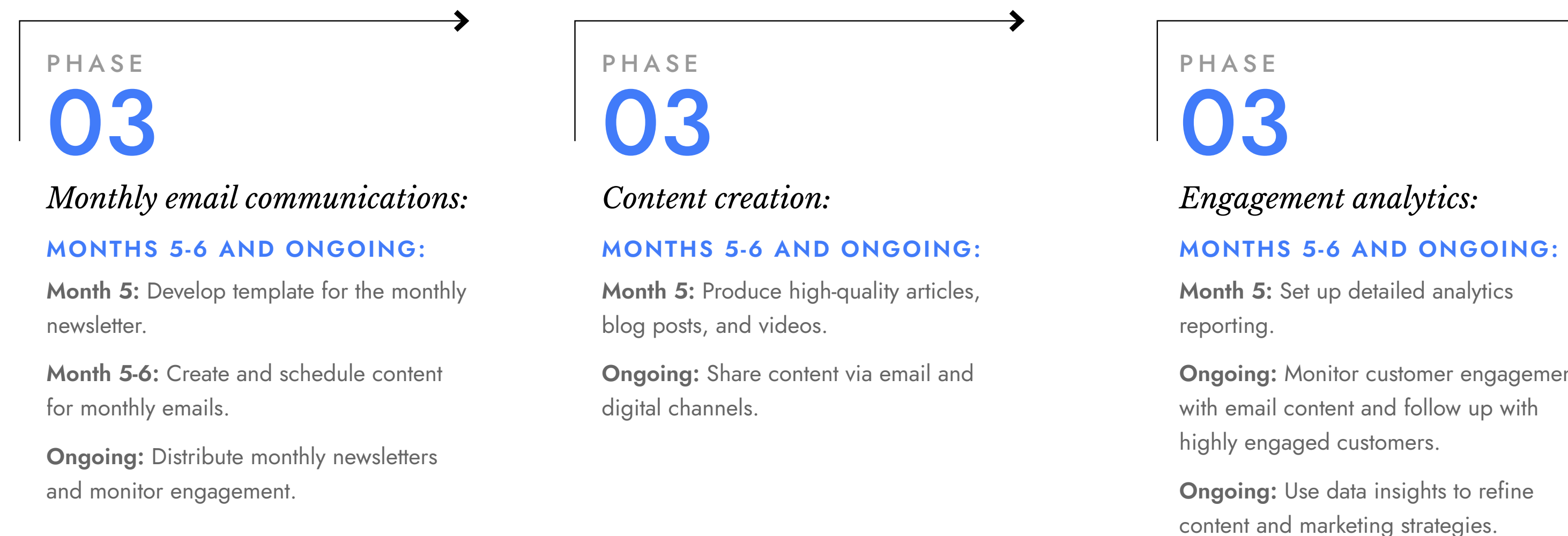




TIMELINE & MILESTONES

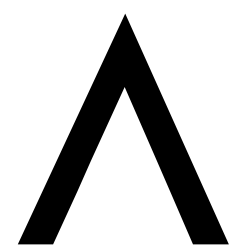
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PHASE 3: ONGOING CUSTOMER ENGAGEMENT AND CONTENT MARKETING



KEY MILESTONES:

- End of Month 1:** CRM system selected and procurement completed.
- End of Month 2:** Initial email campaigns launched and analytics tools integrated.
- End of Month 4:** Automated onboarding sequences implemented and customer onboarding support in place.
- End of Month 6:** Monthly email communications established, and initial content creation completed.
- Ongoing:** Continuous monitoring, performance tracking, and strategy adjustments based on analytics insights.



POST-PROJECT:

Considerations and *ongoing costs*.

After the initial implementation of the proposed marketing strategy, Fixxon will need to account for several ongoing costs to maintain and optimise the new systems. These costs are essential for ensuring the sustained effectiveness and efficiency of the CRM system, email marketing campaigns, analytics, and website maintenance.

01

CRM subscription software:

Description: The CRM system implemented during the project will require an ongoing subscription to maintain access, receive updates, and utilise advanced features.

Estimated Cost: £50-100 per month, depending on the chosen CRM platform and the specific features required.

Considerations: Regular updates and maintenance are crucial to ensure the CRM system remains secure and functional. Continuous training for staff on new features and best practices will maximise the CRM's effectiveness. Regular data backups and data integrity checks should be performed to safeguard customer information.

02

Email marketing software:

Description: The email marketing platform used to create, send, and track campaigns will also incur an ongoing subscription fee.

Estimated Cost: £50 - £100 per month, based on the volume of emails sent and the features included (e.g., automation, advanced analytics).

Considerations: To maintain high deliverability rates, it is essential to regularly clean email lists by removing inactive contacts. Continuous monitoring and optimisation of email content based on performance analytics will enhance engagement and conversion rates. The platform should also be updated regularly to take advantage of new features and improvements.

03

Analytics and reporting tools:

Description: Tools used for tracking, analysing, and reporting on marketing performance will require ongoing subscriptions.

Estimated Cost: £50 - £100 per month, depending on the complexity and capabilities of the analytics tools.

Considerations: Regularly review and interpret analytics reports to gain insights into customer behavior and campaign effectiveness. Use these insights to refine and optimise marketing strategies continuously. Ensure compliance with data privacy regulations and protect customer data.

Total Estimated Ongoing Monthly Costs:

Possible Additional Total Estimated Monthly Costs: £150-£300

04

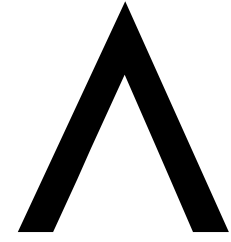
Website maintenance and updates:

Description: Periodic updates and maintenance of Fixxon's website to ensure it remains functional, secure, and optimised for user experience.

Estimated Cost: dependant on the scope of updates and maintenance required.

Considerations: Regularly update website content to keep it relevant and engaging. Monitor website performance metrics to identify and address issues promptly. Implement security patches and updates to protect against vulnerabilities and ensure compliance with industry standards.





Conclusion.

This proposal outlines a comprehensive approach to transforming Fixxon's marketing and sales operations into a structured, continuous, and scalable system. By implementing a CRM system, developing targeted email marketing campaigns, and establishing robust analytics, Fixxon will be well-positioned to achieve sustained growth and improved operational efficiency.

The phased implementation plan ensures that each step is carefully executed, from setting up the CRM and launching initial email campaigns to enhancing customer onboarding and maintaining ongoing engagement with existing customers. The detailed budget allocation provides clarity on the investment required and the value delivered at each stage of the project.

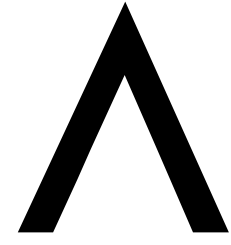
WITH THE SUCCESSFUL EXECUTION OF THIS PROJECT, FIXXON WILL:

Achieve Enhanced Lead Generation:

- A streamlined CRM system and effective email marketing campaigns will generate a steady stream of new leads.
- Improve Customer Onboarding:
 - Automated onboarding sequences will provide a seamless and supportive experience for new customers, enhancing satisfaction and retention.

Maintain Ongoing Customer Engagement:

- Regular monthly emails and high-quality content will keep existing customers informed, engaged, and loyal to the Fixxon brand.
- Enable Data-Driven Decision Making:
 - Comprehensive analytics will provide insights into email performance and customer interactions, allowing for continuous improvement and optimisation of marketing strategies.



Next steps.

To initiate this exciting journey towards redefining Fixxon's marketing and sales operations, the following steps are recommended:

01

Stakeholder approval:

- Gather feedback from all key stakeholders on the proposal and secure final approval to proceed.

02

Project kick-off meeting:

- Schedule a project kick-off meeting within the next two weeks to align the internal team and external partners on project goals, roles, and responsibilities.

03

Contract finalisation:

- Finalise any contractual agreements with external agencies or consultants involved in the project execution.

04

Initial strategy workshop:

- Organise the first strategy workshop to commence the detailed planning phase, aligning with the brand's strategic direction and core messaging pillars.

05

Timeline and budget confirmation:

- Confirm the project timeline and budget allocations, ensuring all teams are aligned on expectations and deliverables.

06

Monitoring and evaluation setup:

- Establish the systems and tools for project monitoring and evaluation, setting the foundation for ongoing optimisation and success measurement.

By following these steps, we can ensure a smooth start to the project and a clear path towards achieving Fixxon's marketing and sales transformation goals.



FAQs

Q1: How long will the entire ecosystem creation process take?

A: The proposed timeline outlines a comprehensive process spanning approximately 6 months from initial strategy development to full implementation and evaluation. This allows adequate time for thorough execution and adjustments based on feedback.

Q2: How will we measure the success of the ecosystem creation process?

A: Success will be measured against pre-defined KPIs focused on brand awareness, digital engagement, surgeon and healthcare professional feedback, and surgeon engagement. Regular monitoring and evaluation will inform us of the project's impact and areas for optimisation.

Q3: What happens if the project exceeds the budget?

A: We will provide a detailed list of costed deliverables associated with each project phase. Regular billing schedules will allow for financial reviews to ensure any potential overruns are identified early, allowing us to adjust plans accordingly to stay within the overall budget.

Q4: Can adjustments be made to the strategy after the project has begun?

A: Yes, flexibility is built into the project plan. We anticipate adjustments may be necessary as we gather feedback and learn from each phase. The project will adopt an agile approach, allowing for refinements to ensure the strategy remains aligned with JRI's goals and market needs.

Q5: How will internal and external stakeholders be kept informed throughout the project?

A: A communication plan and gantt chart of the project phases will outline regular updates, milestone achievements, and feedback loops for both internal teams and external partners. This may include newsletters, project dashboards, and stakeholder meetings.

Q6: What if the ecosystem creation process does not resonate with our target audience as expected?

A: The strategy includes initial testing phases and ongoing monitoring to gauge audience response. If the refresh does not resonate as anticipated, we will gather insights to understand why and refine the approach based on this feedback.

By addressing these FAQs, we aim to provide clarity and assurance on the key aspects of the project, ensuring all stakeholders are well-informed and aligned on expectations.





Michael Colling-Tuck

Founder/Lead

t: 0117 290 0044

m: 07507 014005

mct@agencybristol.com



Adrian Di Mambro

Creative Director

t: 0117 290 0044

m: 07966 211459

adrian@agencybristol.com

