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# Member Relationship Management Toolkit

## Inside

The AXIS Member Relationship Management (MRM) toolkit enables auto clubs to build a 360° view of each member and leverage this information to build lasting relationships.

Look inside to find out how you can:

- empower front-line staff in their interactions with members
- build strong analytical capabilities to better understand members
- collaborate in a progressive MRM vision with a partner who knows AAA/CAA business



Integrated Solutions. Integrated Minds.

# Member

## Relationship Management Toolkit

More than ever, AAA and CAA clubs are focusing on a member-centric business strategy, aiming to provide value to individual members and increase the members' value to the club.

To support this strategy, AXIS provides member relationship management (MRM) tools that enable organizations to leverage member information and build strong relationships with individual members. Using AXIS MRM tools, your club can personalize marketing, sales, and service activities and differentiate how services are offered to provide a unique and valuable experience to each member.

### **Realize a seamless MRM solution across business lines**

The AXIS MRM solution delivers the analytical and operational tools you need to leverage detailed member information, resulting in a seamless services and sales process that improves customer interactions across all business lines. Better yet, these tools provide your users with a collective and individual 360° view of members that contributes to informed decision making and a clear understanding of client history and new opportunities. It's knowledge that leads to more consistent and relevant sales delivery, strengthened members relationships, and improved member retention, all of which result in increased profitability.

### **Gain a comprehensive understanding of your members**

AXIS MRM operational tools such as Navigator's Client Workspace (NCW) provide your CSRs with a comprehensive 360° view of each member to promote effective contact management and relationship building. As a client-centric access point to essential information, NCW is an invaluable

tool for your CSRs to engage in meaningful and relevant communication with members.

AXIS MRM analytical tools provide your analysts with quick, easy access to individual member information for profiling, segmenting, and targeting members with relevant promotions. Data from all business-lines is combined with Lifetime Value, Product Index, promotion responses, third-party demographic and psychographic data, and additional data sources such as client feedback, to provide greater knowledge and insight about each client and your entire club membership.

### **Partner in a progressive MRM vision**

As your organization changes and evolves to meet your strategic business objectives and emerging industry trends, so should your MRM solutions. Work with a trusted partner to develop a shared MRM vision.

Campana is committed to the evolution and advancement of MRM and, with support from progressive clubs and the AXIS User Group, has embarked on a journey that is delivering tailored club-specific solutions. With a strong commitment to the AAA and CAA MRM vision, Campana has the depth of knowledge to help your club chart new destinations.

### **AXIS MRM: How It Works**

The AXIS MRM toolkit features integrated analytical and operational tools and a comprehensive data store that allows for unparalleled individual member insights. These components include Navigator, Client Feedback, Lifetime Value and Product Index, Promotion/ Response Tracking and Database Marketing. Together these components represent the cornerstone of a successful MRM strategy.





#### **Meet Liz Dennison and her husband Charles.**

Members for 33 years, Liz and Charles are frequent travelers, who book an average of two vacations per year. In the past six months, Liz and Charles have purchased or used the following services:

- ERS battery replacement
- Auto Touring Triptik
- Travel car rental and flight
- Renewed Home-Owner's insurance
- AAA credit card holders
- Retirees

## **Navigator**

Navigator is an operational MRM tool that provides your CSRs with a 360° view of each member via Navigator's Client Workspace (NCW), to deliver quality customer service. With NCW, your staff can easily initiate transactions, review member details, search past transactions from all business lines, and drill-through to detailed client information. Navigator facilitates active member relationship building by allowing your CSRs to efficiently manage every contact with the member, ensuring seamless processing of sales/requests and follow up as required.

This benefit is further enhanced through the use of **Dialog Topics**, which display "just in time" relevant cross- and up-selling opportunities and other recommendations for discussion with the member. Dialog Topics allow you to target individual clients based on marketing criteria for capitalizing on sales leads, while personalizing and enhancing member interaction. In addition, customizable navigation actions ("macros") provide you with one-step access to AXIS menus and functions, internet/intranet sites, and third-party applications. This simplifies and speeds transaction processing, while increasing productivity.

## **Client Feedback**

The Client Feedback tool gives you the flexibility to create feedback forms and surveys that collect relevant, first-hand information about your members via your club website and from your CSRs. Use the resulting information to track requests and leads, identify members' concerns, and improve customer satisfaction levels. This data also contributes to your 360° view of members and integrates with Database Marketing to provide targeted member promotions.

## **Lifetime Value and Product Index**

**Lifetime Value (LTV)** uses transactional data from all business lines to calculate the value of members to your clubs. Members are assigned a resulting LTV code, which can be used when deciding customer service policies, renewal rates and promotions in order to reward your most valuable members. The **Product Index** calculates a score for each individual and household, providing insight into the depth and breadth of the relationship between the client and club.

## **Promotion/Response Tracking**

Promotion/Response Tracking (PRT) provides marketing staff with the tools they require to actively manage campaigns and target individual clients. Using PRT, marketing staff can assign promotions to a group of targeted members or clients and measure the overall effectiveness of particular promotions. Visibility of promotion activity is integrated into Navigator and Database Marketing.

## **Database Marketing (DBM)**

Database Marketing (DBM) provides your marketing staff with the tools they require to analyze a vast array of customer data for profiling, segmentation and targeting, as well as membership renewal analysis. Data sources include transactional data from all business lines, as well as membership renewal data, demographic data, promotional campaigns and responses, Client Feedback, Lifetime Value and Product Index. DBM allows unlimited custom data imports which are often used to incorporate third-party demographic and psychographic data.



AXIS Navigator has been of great value to the front-line staff because it provides them with a more global profile of each member. Navigator is user-friendly and helps staff quickly identify key information and provide a far better quality of service. This directly reflects on the loyalty of our club members.

**Marie-Claude Nantel**  
Operational Support Analyst  
CAA Québec





We'll help you navigate your MRM journey.

## About Campana

Campana Systems is an international leader in information solutions for the auto club and health care industries. Since 1988, we have been enabling our clients to achieve their ongoing business objectives using our in-depth industry knowledge and trusted technology solutions.

AXIS, a division of Campana Systems, applies its in-depth industry knowledge and experience to maintain leadership in providing an evolving suite of integrated software and service solutions for AAA/CAA auto clubs.

The AXIS division offers Member Relationship Management tools that interface seamlessly with AXIS Membership, Travel, Point-of-Sale and Emergency Road Service.

With years of experience in the industry and a proven track record of comprehensive, integrated and cost effective solutions, Campana consistently meets and exceeds club expectations while keeping with current AAA Standards.

**Campana**  
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