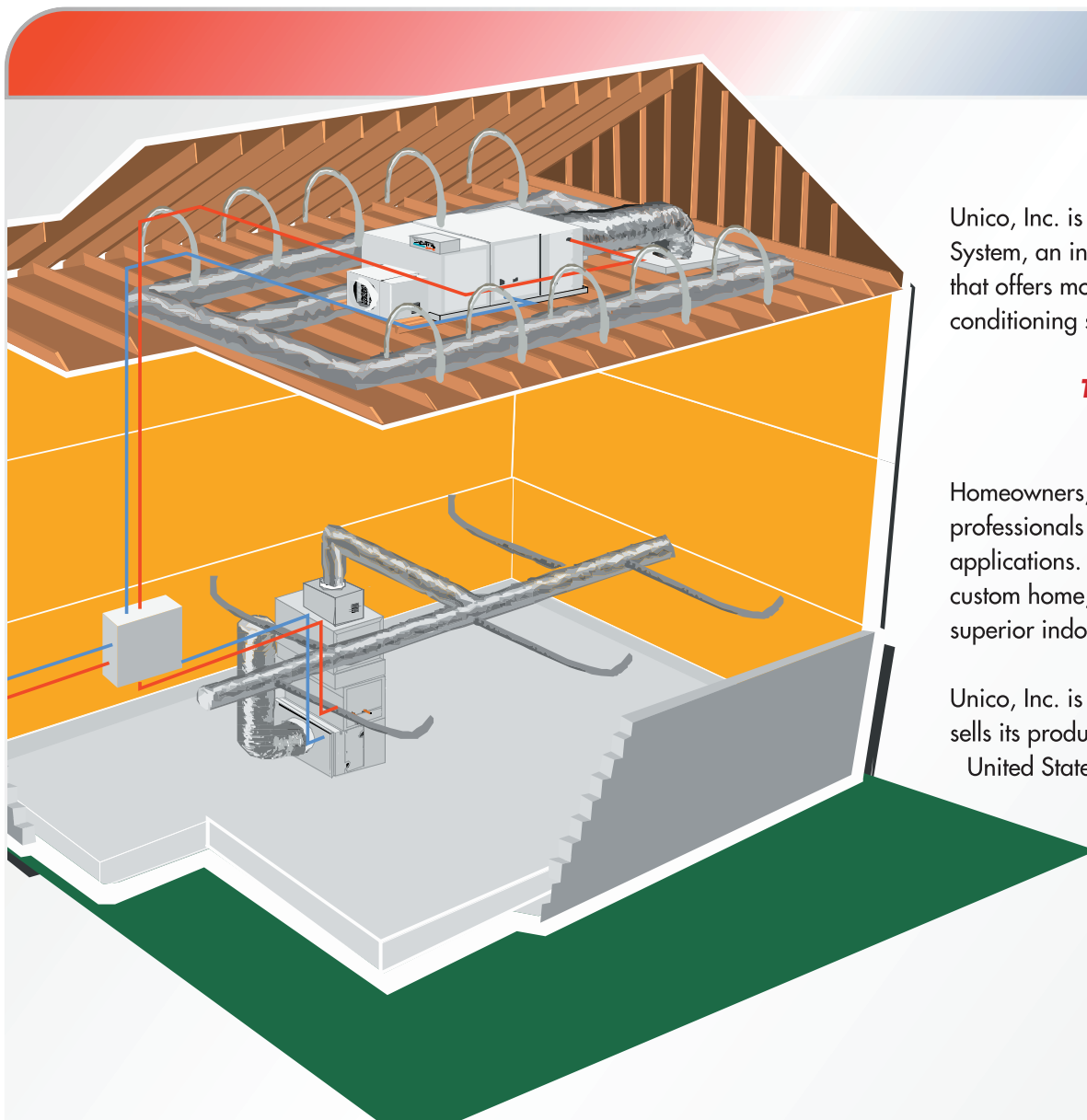


# The Unico System®

Small-Duct Central Heating & Air Conditioning



## About Unico

Unico, Inc. is a privately-held company dedicated solely to producing the Unico System, an indoor air handler and flexible small duct high velocity HVAC system, that offers more options than any other conventional heating/ventilation/air conditioning system.

***The world's leading manufacturer of small-duct central heating and air conditioning***


Homeowners, architects, custom builders, interior designers and specifying professionals are using the Unico System in their custom home and retrofit HVAC applications. Whether the installation is a retrofit, historic preservation, new custom home, commercial application or unique solution, the Unico System delivers superior indoor comfort with little or no remodeling required.

Unico, Inc. is based in St. Louis, Missouri. The company has over 85 employees and sells its products through 22 Independent Manufacturing Representative firms in the United States, Canada, and the U.K.

case study

## The Challenges

### ***No way to track and measure the effectiveness of marketing dollars spent on Tradeshows (the most recent show measured was the International Builders Show).***

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- Did not have a large, in-house database of Builders in our house/SalesForce.com database; purchased a direct mail list from the International Builders Show and offered a unique value proposition with urgency to gain permission for ongoing communications
  - Little or no accountability on the marketing dollars spent for the various lead generation activities
  - Limited email marketing addresses available with current opt-in list from contact Unico forms on corporate web site
  - Determining if the offer of a free unit for a builder's display home would compel them (builders) to visit their Purl. If they were not going to the tradeshow, would they like to meet the Unico Rep, participate in a lunch and learn, or use the Unico engineering department for /yourplans
  - Marketing budget was not expanding, needed to develop new methods, leveraging tools to drive results with existing budget restrictions
  - Little Understanding of how to entice builders to engage with Unico

### ***Difficult to measure sales performance through the sales channel***

- Based on their ability to drive leads and follow up with builders using direct mail and Purl's vs. email and direct mail, the Sales Reps did not have any factual documentation to share with the sales channel
- Required improved methods and documentation to understand the results of our direct mail campaign allowing Unico to hold the Manufacturing Reps accountable for the lead follow up process
- Wanted to extend the position of Unico to be "top of mind" when interacting with the building industry
- Needed consistency with documenting performance to align with Unico corporate sales and marketing processes
- Difficult to track builder satisfaction after product has been demonstrated
- Ability to increase up-sell/cross-sell was impacted by lack of understanding what is most important to the builders

## The Solution

### Tools

- Purchased a database of builders who attended and/or inquired about the International Builders show in 2007
- Send direct mail and email to the existing builders in Unico's salesforce.com which had not been contacted over the last 1 – 2 years
- Implemented the MindFire Purl solutions along with ExactTarget to deploy a precision one-on-one directmail and email communication
- Implemented MindFireInc for content management with an active marketing component and realtime ROI Dashboard which immediate lead delivery process

**Process:** Defined and implemented technology automation

### **Developed new process for lead import and distribution**

- Redefined mapping and distribution of all leads whether they attended the tradeshow or not.
- Provided a brief survey to further qualify and determine what was most important to the builders.
- Integrated submission with salesforce.com to capture lead records and utilized work flow rules to distribute assigned leads via email to appropriate Unico sales executive for immediate follow up to interested parties.
- Sent customized follow up email to end-user with relevant product information
- Trained sales channel on how to view, record, and update activity results

### **Scheduled lunch and learn, and provided additional insight about / your plans for builders**

- Gained knowledge on how to provide immediate follow up and distribution of leads. Holding our sales and marketing dollars accountable with proven ROI.
- Gained knowledge on the perception of the Unico solution in the builder industry

### **Began a new process for immediate lead follow up to builders**

- Implemented advanced "Mindfire Dashboard" analytics
- Better understanding of why builders who inquired with Unico in the past did not buy and why
- Had realtime review and delivery of builders leads delivering immediate results

### **Redesigned Unico direct mail piece to enhance the value proposition adding urgency for the builder to visit their Purl (free Unico display system giveaway with registration deadline)**

- Made it easier for individuals to find relevant content and sign up for the free display system
- Increased branding to provide better image and make it consistent with Unico's current branding
- provided immediate access to Unico resources who could help the builder better understand the Unico System products

### **Integrated MindFire, Exact Target and salesforce.com**

- From direct mail post card and email, prospects were enticed to visit their Purl allowing for web-capture submission with survey insights
- automated follow up email with customized auto-responder and lead delivery
  - Based on survey question answers, we are generating and sending lead/contact information to the appropriate contacts depending on the builders need
- assignments through automated tasks within salesforce.com and direct phone calls.
- Created reports and dashboards based on direct mail and email behavior with results
- Created daily "sales report" via emails sent to each Manufacturing Representative Firm with status and standings of sales efforts to date

### **Generated Satisfaction Report for Manufacturing Representative Firms**

- Closed the loop on end-user satisfaction with Manufacturing representative firms follow up.

### **Knowledge:**

- Behavior: Direct Mail combined with email marketing
- Demographics: Expanded and targeted to Shawn's territory
- Opinion: Email surveys across all builders to define what is most important to them and if they knew about the Unico solution
- Purchasing: Applying Salesforce.com tracking to analyse length of time from lead capture to close of the sale
- Advertising: Testing and measuring print and email communication through the use of our Mindfire dashboard
- Direct Mail: defined the value of a purchased list from tradeshow promoter.
- Implemented a series of marketing and sales related on-demand technologies to manage the Builder lifecycle from lead to customer advocate

## The Results

**Economy:** We have created a process that will allow us to determine the value of attending industry specific tradeshows, potentially saving the company thousands of dollars in tradeshow participation.

Provided access to low cost product information instantly for our prospects via email, and the Unico System Web site.

All of our rep firms can now be directed to review, update, and maintain lead/opportunity status within salesforce.com. We now have a real time ability to generate sales forecasts and understand direct marketing for future tradeshows. By creating immediate campaign results, rep firms are held accountable for their sales efforts.

**Efficiency:** We have created and documented processes for deployment, reporting, and task generation with our follow up processes. With communications through the sales channel, we are saving time and money in closing the sale.

The company has created a new asset that did not previously exist which enhances our support of the builders, contractors, distribution vendors, sales partners and investors.

**Effectiveness:** We now immediately reply to prospects with relevant product information based on survey responses. We anticipate our time to close a sale can be reduced by 40%, and our cost of sale has decreased. We now have a foundation that will continue to allow for rapid response to market trends which can be implemented by people with minimal technical knowledge.

|               |                                   |
|---------------|-----------------------------------|
| Mailer w/PURL |                                   |
| 3,000         | Number of Mailers Sent            |
| 300           | Number of Emails Sent             |
| 3,300         | Total                             |
| 0             | Phone Responses                   |
| 54            | PUR L Responses                   |
| Unknown       | Show Responses                    |
| 1.64 %        | Response Rate                     |
| 16            | Number of Lunch & Learns Arranged |

### Other Key Aspects Learned from the PURL

#### Of the 54 Respondents,

- 24% of the recipients were attending the show
- 40% wanted to schedule a Lunch & Learn
- 83% are builder who build 10 or less houses per year
- 12% had never heard of the Unico System
- 27% have heard of Unico, but are not familiar with the product
- 83% requested more information on Unico's free duct design service
- 10 Builders from our Database Responded to the Direct Mail
- 18 Builders from the Purchased List responded to the Direct Mail piece
- 16 Builders from our database responded to the Email

#### Results of Email to Sales Force List:

- Sent on February 19th to 281 Builders
  - 243 Emails were delivered and 39 Bounced
  - 75 Emails were opened
- 16 Builders visited their PURL and filled out a survey
  - 3 were attending the IBS Show
  - 8 requested a Lunch and Learn at their Office
  - 70% knew about the features and benefits of the Unico System, but had never used one
- 70% Requested More information on Unico's Free Duct Design