

## AAM-MAA Winner Profile: Internal Marketing Campaign Reaps Over 25% New Business for Isdaner & Company

**I**sdaner & Company, LLC (nine partners, 60 total staff, Bala Cynwyd, Pa.) knows the importance of educating employees and generating excitement about client service. Now that the results are in, Jill Lock, Director of Marketing is pleased to tell her fellow AAM members about her successful internal marketing campaign that showed increases of over 25% of new business after only an eight-week program.

### Theme

An employee committee, consisting of eight members, first began by challenging themselves to develop a theme. Without much disagreement, the committee determined that a theme surrounding a huge horse racing event, The Kentucky Derby, would be the right approach to their marketing awareness campaign. Of course, having a Kentucky Derby in Pennsylvania wouldn't work, so the customized theme became "The Isdaner Derby Run for the Clients."

### Program Specifics, Goals and Results

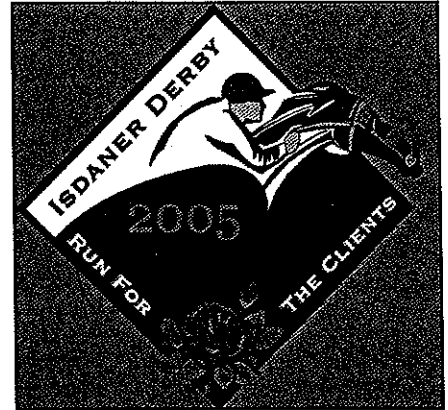
To kickoff the program and share the goals with all firm members, the conference room was decorated with Derby hats, red roses and numerous other horse racing items. The room definitely set

the stage for the campaign. The kickoff provided booklets that were handed to each employee as a reference guide to the benefits to employees, program goals, duration of program, list of teams, award list and rules on how to obtain an award, program monitoring, captain selection process and duties, role of the team, important events, reading list, activity lists (with point allocations) and firm service offerings and industries.

The goals were defined clearly as:

**To provide value added service to clients.** Over 200 holiday/congratulatory cards with personal notes were sent to clients, over 50 clients were contacted that had not been contacted in the last three months, approximately 50 clients were called for good will, over 20 clients were taken to lunch and 15 new business opportunities were cross-sold to clients.

**Improve client relationships.** Once the team captain was selected, all teams were required to develop a name, with slogan, logo and props. Clients were then invited to a lunch for the team naming announcements and judged each name, then choosing a winner. This luncheon brought the clients and employees together, enhanced existing relationships (on a personal level), and built new relationships.



**Enhance camaraderie among employees.** The team creation mixed different professionals from various departments. Development of a team name, team meetings, professional development seminars and an awards banquet were all ways the team members built upon their existing relationships.

**Build (or enhance) relationships with referral sources and prospective clients.** Over 200 business cards were distributed to appropriate referral sources and prospects, over 20 prospects were taken to lunch and over 40 networking events were attended.

**Increase visibility of the firm.** Program goals were shared with over 100 clients, referral sources and prospects, and media personnel.

**Help the firm become more profitable.** As a result of the activities during this eight week period, the firm had an increase of over 25% new business to firm revenue.

### Costs

The cost of the program was \$7,300 which included booklets, prizes, trophies, gift baskets, lunch meetings, DVD, props and an awards banquet.

To learn more about this program, contact Jill Lock, Director of Marketing for Isdaner & Company at [jlock@isdanerllc.com](mailto:jlock@isdanerllc.com). **AA**



Isdaner & Company's conference room was decorated with derby hats, red roses, and numerous other horseracing items to set the stage for the campaign.