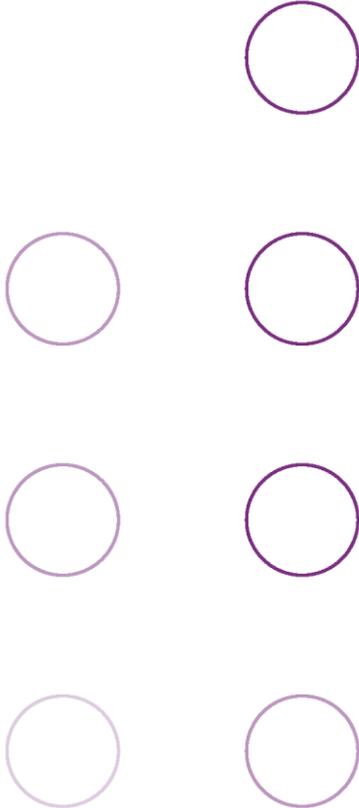




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# Case-study: Wessex Resolutions CIC

Helping WRCIC gain clarity



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## Summary of case study

Wessex Resolutions CIC (WRCIC) was concerned about the low uptake of their loan scheme for vulnerable people whose homes needed vital repair and maintenance work. Despite spending time and money on marketing, they weren't getting the results they needed. They needed to find out why.

They engaged Kara to help them undertake customer and stakeholder research. Kara also suggested an audit of their marketing to see where they were leaking customers and to give them strong foundations on which to create their Strategic and Tactical Marketing plans.

As a result, WRCIC came away with greater clarity about how to stop prospective customers leaking out of the Buying Process: their marketing had to focus on this rather than more awareness marketing to generate new leads or costly new product development.

## About Wessex Resolutions CIC

Wessex Resolutions (WRCIC) is a Community Interest Company providing Local Authority (councils) supported loans. As a not for profit lender, they work with over 20 Local Authorities who all fund loan schemes for their area.

The loans are used for essential home maintenance or repairs for people who are unable to access other financial support.

Delivering their service can be challenging:

- They report to 20 different Local Authorities, each operating a slightly different loan scheme.
- There are enforced legal restrictions on how they can advertise their financial support packages.
- Their end-customers are some of the most deprived and hard to reach in our communities.
- The end-customers can approach WRCIC directly for loans or via their Local Authority, so there are 21 different routes to purchase.
- The people who need the loans often have strong emotional reservations about approaching WRCIC or their Local Authority for help.

Headed by passionate Managing Director, Andrew Wallace, and Development and Delivery Manager, Mel Richards, they are determined to ensure WRCIC's vital services help those that need them.

## Background to their marketing

WRCIC's marketing wasn't working.

For over two years, they had tried different marketing tactics to increase the numbers of people applying for their loans but with very limited success.

They knew there was a desperate need for the loan scheme. They also knew that the loan application process was long, confusing and frustrating. Following a process improvement project, led by independent consultant Steve McLauchlan, they removed a key "blockage" in the customer journey.

However, their marketing still wasn't effective at driving the numbers of referrals that they really needed. Something else had to be done.

## Key marketing issues

Andrew and Mel decided that before WRCIC spent more money and effort on marketing, they wanted to check that they were offering the right product and gain a better understanding of their customers.

They wanted to:

- understand their customers' perception, barriers and competitors/alternatives
- gain an insight into why they weren't getting a satisfactory uptake of services, despite there being a need
- develop marketing plans based on research, so they would work.

Steve recommended that they approach Kara Stanford to help them.

## First: a marketing review with customer research

Kara, collaborating with another Watertight Marketing Accredited Consultant, Ros Conkie, undertook a review of WRCIC's marketing activities throughout the whole customer Buying Process.

There were two key goals:

- Understanding why potential clients were not hearing about WRCIC.
- Understanding why potential clients were leaving the Buying Process early, i.e. why WRCIC was leaking prospects.

Kara and Ros wanted to understand WRCIC's products and the buying process from different angles, with views from staff, customers and stakeholders. Therefore, they set up several elements to this project:

- A workshop with the WRCIC project team to understand the target demographic and assess their Buying Process
- A workshop with WRCIC’s front line staff to gather their thoughts on the organisation’s marketing and the informal feedback they gleaned from clients
- A focus group with the Local Authorities (without WRCIC present) to understand their views and concerns
- Desk analysis of WRCIC’s client data and LA demographic information
- Direct research with potential clients to understand their reasons for not taking the loan, despite beginning the process.

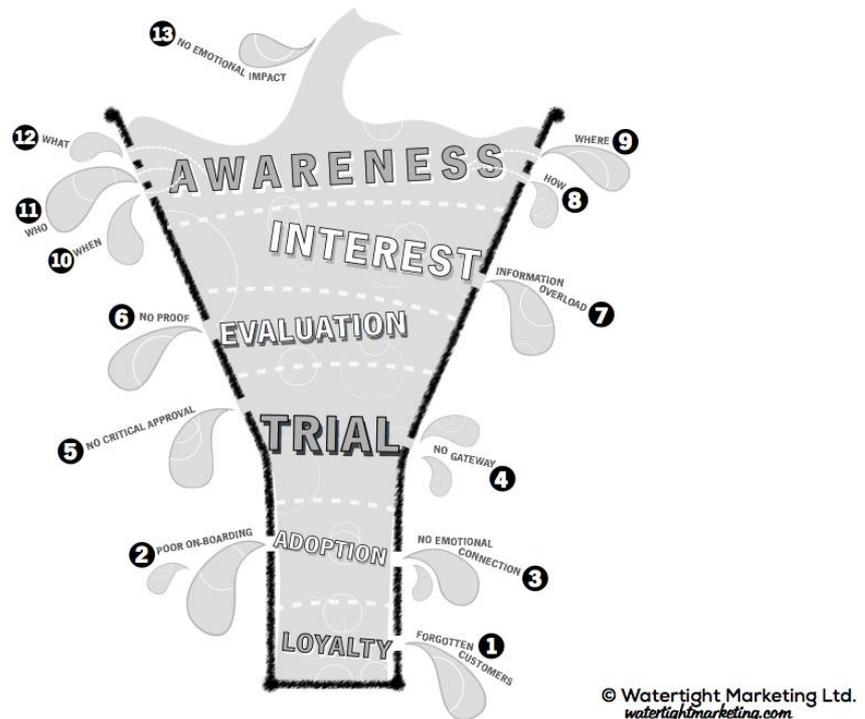


Diagram: The Thirteen Touchpoint Leaks™ where organisations leak profit in the Buying Process

The marketing research project produced many insights but key ones were:

- The products, i.e. the loans themselves, were suitable and fit for purpose; something that the WRCIC had questioned given their low uptake.
- Potential referrers, such as staff at the Local Authorities, were not referring the schemes as they weren’t aware of or didn’t understand the loan schemes.
- WRCIC’s marketing messages were not always effectively communicating the benefits of the schemes compared to alternatives.
- Communication from WRCIC during the long buying process was often insufficient for prospects, so they would “leak out” of the process before they had received their loan.
- The process to acquire a loan from WRCIC took too long for some, leading to more “leaks”.

The research confirmed that WRCIC understood their market and their products were what clients wanted; there was no need to instigate a costly product redevelopment project.

“This was a complete mind-shift for us ... We didn’t need to do more promotional work and find new customers ...”

Mel Richards, WRCIC

promotional work and find new customers – we just all had to ensure we kept the ones that already knew about us and had already applied.”

Andrew agreed, saying “You have drawn to our attention the challenges and what we might do about them. Your report is clear, easy to follow and sets out what we need to focus on.”

However, the research also showed that if everybody who was eligible for a loan and had begun the process stayed and finished the process and got their loan, then **WRCIC would more than achieve** their annual goals for the number of people helped and loans taken.

There was no need for much more “awareness” marketing – if Andrew and the team could work with the Local Authorities to fix the identified leaks in their Buying Process, WRCIC would be a huge success.

As Mel said, “This was a complete mind-shift for us and the Local Authorities. We didn’t need to do more

“Your report is clear, easy to follow and sets out what we need to focus on.”

Andrew Wallace, WRCIC

## Then: honing their marketing messages

Following the market research project, Andrew engaged KMS Marketing to facilitate a workshop for WRCIC to develop key marketing messages at each stage of the Buying Process.

This helped the team:

1. Create a succinct Vision and Mission Statement that they could use as the foundation of their strategic marketing plan.
2. Identify the wording that would best differentiate them from competitors and alternatives without sounding clichéd or insincere.
3. Develop a series of powerful marketing messages that they could use in all their marketing.
4. Conclude that their current branding fitted with their Mission Statement so no major changes were needed but the fonts used could be refreshed.



## Next: a realistic marketing plan

With some tools and support from Kara and Ros, Andrew, Mel and the WRCIC team were now ready to create their Strategic Marketing Plan, knowing that it would be built on strong foundations.

When Kara and Ros caught up with Andrew and Mel some months later, Andrew commented that, “We now have a clear, strategic plan about the approach we need to take.”

This included gaining the funding for some more part-time marketing team members and a huge stakeholder engagement programme with the Local Authorities.

## Conclusion

Under Andrew’s strong leadership, WRCIC was able to admit that what they had tried didn’t work, bring in outside help, and then listen to the surprising findings.

“We needed expert input and your input has brought us to a new place. We now have the tools necessary to achieve this.”

Andrew Wallace, WRCIC

Mel and Andrew then acted on those findings to improve marketing across the whole customer journey and convince their key stakeholders of this need too.

At their final meeting with Kara and Ros, Andrew observed that, “We needed expert input and your input has brought us to a new place. We now have the tools necessary to achieve this.”

We wish WRCIC every success now and in the future.

## Contact us

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