

Track your best customers with RB's points system

RB8 offers an optional marketing system plug-in for tracking individual contact activity with your firm. We developed this plug-in for the unique needs of Alabama firms who reward attorneys, secretaries and paralegals with points for booking jobs with them.

In Alabama, court reporting firms are allowed to give clients gifts, gift certificates and even cash in exchange for points. We realize that such an exchange is not legal in all 50 states, so you may not be able to offer your clients these incentives. However, there are other uses for a points system, so we offer this plug-in as an optional tool in your marketing arsenal.

Know which calls generate the most revenue

Similar to the sales commission concept which tracks business by sales rep, the RB8 Reward Points plug-in tracks business by who requested a job. This way, you can see how much revenue, including original and copy sales, was generated from a job request.

You can easily see who your best clients are, not by who you are billing the most, but by whose calls generate the most revenue. This is better for your marketing staff to know because total invoice amounts can be misleading — a lot of work is billed to third parties, such as insurance companies whom you don't market to, and a lot of a law firm's invoices might be copy orders on jobs they didn't initiate.

This differs from RB8's Calendar Analysis, which shows how many calls your clients make, but not the revenue generated from those calls. This also differs from RB8's Client Analysis, which shows billing amounts for a firm, but these could include a lot of their own copy orders and no connection to copies ordered by other parties on jobs your client initiated.

With a merit system, you know which clients "earn" the most revenue for your firm, so you can market more effectively, maybe by giving these clients special attention, rewards (as allowed by state law), or a preferred rate.

How RB's points system works

This point award system is designed to work similarly to airline mileage programs or credit card reward systems, but if you are not legally allowed to give rewards or prefer not to, you can use this system as a sales analysis tool instead.

You determine which clients you want to award points to, how many points to award per dollar billed, and which service items earn points. For example, earmark appearances and pages to earn points, but not delivery, mileage, parking and other pass-through expenses.

With your points system set to award one point for each dollar earned, you can see how much revenue is generated by

each of your clients, broken down by individual contacts at each firm in the Points Analysis report under Payables.

Make your business more rewarding

If you can offer incentives based on settings, then this merit system can be a powerful tool in building client loyalty. You assign a value in redeemable points for dollars spent with your company, then monitor each individual contact's points status, including their current balance, any pending points in their account, how much they earned on a particular invoice, and how many points they have redeemed. Points are earned when an invoice is generated and posted, however points are pending and not redeemable until the invoice is paid.

You can set up point-sharing between contacts, if they prefer. For example, designate that every \$50 is worth three points, and give your attorney-clients the option to allot those points any way they wish between their secretaries, paralegals and themselves. They could split points three ways, give them all to their secretary, or use some other breakdown. You can also honor requests to transfer lump sums of points from one person to another, and award bonus points for signing up.

If you are redeeming points for cash, gift certificates or other items, use Points Analysis to see how much you have spent on redemptions, plus see at a glance how much you need in reserve to cover all outstanding points.

Give clients access to their points

If you want your clients to be able to monitor their points themselves, add the RB Web My Reward Points plug-in. They can see their current points balance, pending amounts and history, plus make requests to redeem or transfer points online.

Whether you choose to award clients for their loyalty or use this system for sales analysis only, the RB8 Reward Points plug-in makes it easy to see which firms and which individuals are generating the most revenue for your company, so you can treat them as the important clients that they are.

The RB8 Reward Points plug-in costs \$50/month per RB8 Server. The My Reward Points plug-in costs an additional \$50/month, and requires RB Web. If you have any questions or would like to subscribe to these plug-ins, please contact RB Sales.

RB Sales

851 California Drive | Burlingame, CA 94010

650-396-2105 | 650-560-6550 (fax)

info4@omti.com | www.omti.com/rb



ReporterBase