



Conversation with Trend Micro Director Tobias Lee of Trend Micro About Customer Reference Management

Introduction

Hi. My name is Tobias Lee. I'm the Director of the Corporate Marketing Operations at Trend Micro and I'm responsible for the Customer Reference Program here at Trend.

Can you describe Trend Micro's challenges with Customer Management Reference Management?

We're a global company and we have regional offices throughout the globe. So, with all the challenges that occur in a multinational company, some of the more prominent ones are things like communication and coordination around really effective company deliverables like customer references - ensuring that our many salespeople and marketing staff we have across the globe can go and access and get all those good things that we're delivering.

We saw many parallel piecemeal movements to get references. The concern that I had when I took on this task was that we weren't acting in the most efficient, cost effective and results oriented manner.

The company recognized that there had to be a better way to ensure customer references were being prioritized correctly, managed effectively, and had a common process to improve the efficiency and results of how we actually achieved these. In the end, I think it was a general acknowledgement that we wanted to take our customer reference efforts to another level. And that's why we wanted to proceed with something a little more mature, if you will, in a professional nature.

What benefits did you hope to gain from addressing this area?

In general, the benefits for customer references are pretty obvious. I think the ability to provide a service to sales and have them have access 24/7 to a global database of the references that we currently have, in addition to having a service capability to request references that they need that don't exist in that database, is a value add that we never had before.

And we believe that delivering that type of value and service to sales is going to increase the effectiveness they have when they're out in the field, where their main challenge is the way to demonstrate credibility's surrounding the solutions to perspective customers or channel partners, and also company credibility in some of the regions where the Trend Micro brand may not be as pervasive as it is in others.

From the marketing prospective, I think it's marketing's job to really understand and promote the optimal marketing deliverables that leverage customer references. So, things like marketing collateral, vehicles like webinars, and forums that showcase the customer references we've obtained, really help sales become more aware of the great things we're doing. Having an application and a process around that application really increases the benefits we can provide to both customer sets.

In general, I think the cost justification was clear because the results were not only non-disputed in value, but also the perceived benefits and greater ability to obtain references, better consistency, better awareness of the common process for anyone at Trend Micro to get references, clearly substantiated the cost involved to go and do this.

What capabilities were required for your Customer Reference solution?

I think from a capability perspective, there were a few key things that were very important to us when we were examining an ideal solution for Trend Micro, based on our unique needs and based upon our unique organizational structure. Some of those are global access, so being able to log on from wherever you are and whatever region you are in, without making it complicated, to just get onto the program.

I think in addition to that we were really looking for an application that had robust centralized management with access rights, for tiered administration, so we could create a super user and also power users, to have regional control among the respective users within that region. Our intent is really to have this rolled out in phases and eventually have each region take more of a participatory role in the management of it, as well.

Other things were, reporting functionality. We wanted to have capabilities within the application to demonstrate our success and growth. So, having easy templated reports that either were instantly available, or the data was exportable in an easy to use manner, where we could create executive level summaries to show here's how good

we're doing and here's how much better we've done since implementation of this program - whether it's along vector from case studies to industry verticals for customer references that would speak with the media.

Some other quick things that were very important to us, were to have a mature and advanced tracking and routing capability so that the Program Manager would be able to understand the amount of requests that would come in; be able to prioritize which ones were most important to the company at the time, and communicate that across all the requesters and into the broad audience. And of course having an intuitive, easy to use UI for users was also very important to us.

To recap, global access, centralized management, secured access capability, reporting, prioritization tracking and easy to use UI, were all key things we were looking for, when we were investigating potential solutions.

Why did Trend Micro buy, versus building a solution internally?

I think with many companies that have technology expertise, it's also specific to the industry that you're in. And obviously the company is not going to pay wages or time allocation to build programs not related to the core business. So, I think that time-money allocation, expertise, were critical concerns why we didn't try to pursue this internally.

Additionally, I think on the expertise component, it's an important one to really discuss because having a dedicated expert who lives and breathes this - I think is an added bonus you get from going to a vendor who specifies in this business. And that comes through not only in the application features that you see - because those make a comment upon the level of expertise - but also helps make a comment about the structure of the program you're looking to launch around it. I think that component of expertise was a critical one that we didn't have internally, which really led us to an outsource model.

Can you speak about your implementation of Boulder Logic Reference Manager?

We've addressed a number of topics in this interview. Some were regarding the feature requests we're looking for in the solutions; some were around the organizational challenge we had to roll out a program of this magnitude within Trend Micro, and we felt that the Reference Manager application and Boulder Logic as the company, provided an excellent blend of all of those areas that really made it a winning solution for us. Their program and solution had enough capabilities and was flexible enough and well thought out enough, to really help us fine-tune our own reference program.

And I'll go back to the comment I made earlier, which was, the development of an application, speaks very well to the expertise of the vendor in that industry. So, looking and talking with Boulder Logic and really, I think, combing through the details of how we were going to roll out a customer reference program - seeing how those two mapped together - the application and the program - there was a lot of back and forth that helped us in a beneficial manner - tweak the direction of how our customer reference program would go. So, I think that's a good commentary upon the expertise that Boulder Logic has and we've certainly benefited from it.

We found the staff at Boulder Logic to be completely supportive, quick, fast, and nimble - all the things we needed to get this out quickly and in a professional and robust manner. And we're very happy thus far, with the relationship and look forward to great things in the future.

What else did you learn in this process?

I think that my experience, so far, has been a very good learning lesson, in that, it's not necessarily as easy as it seems. It requires a number of coordinated efforts, not only from a resource perspective, but also from the implementation effort within the regions or within your executional marketing and sales arms. And understanding the magnitude of what's required to ensure that gets out successfully is not to be underestimated and does require quite a bit of planning and thought. So, I think that was a good lesson learned for me, as I embarked on this in the past year or so.

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