



Efficiency

2011 Judge: Monroe “Roey” Diefendorf, Jr.

2010 Award Winner to Judge 2011 Competition

Roey Diefendorf has been selected as one the judges for this year’s “Efficiency” category for both the Americas (North, Central and South America) and Europe, Middle East and Africa.

As a follow up to last year’s Gold Medal CRM award, Roey Diefendorf will be judging the CRM awards in the category of “Efficiency.” Diefendorf’s proprietary CRM software – *Megethos3* – and case study presentation in Los Angeles gained him the recognition and respect of the technology world.

The Gartner and 1to1 Media CRM Excellence Awards are all about highlighting world-class customer strategy and CRM initiatives and broadly sharing their successes, challenges and insights.

Past winners of the Gartner & 1to1 Customer Awards have included Accenture, Bath & Body Works, eHarmony, Hewlett-Packard, Honeywell Aerospace, Ingram Micro, Nikon, Tractor Caterpillar, Travelocity, and of course, Diefendorf Capital.

Awards will be granted for five categories of CRM initiatives:

Customer Analytics – Use of analytics to optimize sales, marketing, and service processes and the use of insight to optimize each stage of the customer life cycle from initial investigation to purchase to ongoing support. Specifically, entrants should highlight their use of analytical tool, models, warehouses processes and dashboards in increasing sales or performing efficient campaign management during marketing activities or in analyzing and understanding customer service issues. This category is all about the use of analytics in performing CRM related activities.

Customer Experience (CE) – Commitment to the design and delivery of an exceptional CE that is demonstrated by significant improvement in customer satisfaction, loyalty, retention, or advocacy, as well as positive feedback and high CSAT. Organizations must explain how they deliver a differentiated, superior experience at all points of interaction.

Enterprise Efficiency – Reducing operational and interaction costs and improving sales, service, or other customer-facing processes without a detrimental impact on the customer experience. This includes excellence in efficiency improvements in sales, marketing, and customer service.

Organizations must show significant improvement in growing customer value (such as revenue growth, wallet share, products per person and frequency of purchase) by improving processes and while lowering costs.

Integrated Marketing – Excellence in integrating people, processes, and technologies across the marketing ecosystem to increase effectiveness, improve efficiency, and drive marketing performance and marketing return on investment. Potential areas of integration include channels (offline and online, social media, and traditional media), campaigns (outbound, inbound, and event-triggered), marketing alignment with sales (lead management) or customer service (retention and loyalty), planning and marketing mix optimization, strategic planning and performance management, and content/asset management. Entrants must show how they integrate people, processes, and technologies across the marketing ecosystem to increase effectiveness, improve efficiency, and drive marketing performance and marketing return on investment.

Social Engagement – Harnessing social networks and hosted communities to extend sales, marketing, and customer service processes as part of a mutually beneficial relationship, as well as the most innovative use of new media (e.g., social networking analytics, virtual worlds, mobile) to support or enhance an organization's customer strategy. Entrants must show how they use social media or hosted communities to extend sales, increase marketing or perform customer service related activities.

Former judges include; -- Past judges include John Deighton of Harvard Business School, and Canada Post Director of Customer Value Management Janet LeBlanc, and Ritz-Carlton Leadership Center Corporate Director Jeff Hargett, and Stephen M.R. Covey, author of *The Speed of Trust*.

The awards will be announced for five categories of CRM initiatives at the Gartner Summits in Los Angeles, CA and Lancaster, England.

Roey Diefendorf is CEO of his family of financial service companies. Under his leadership, the Diefendorf organization instated his proprietary Business Process Management software (Megethos3) to capture the Gold Medal award in the 2010 Gartner "Efficiency" category. It was his comprehensive understanding of "process" that led the Gartner organization to add Roey to the list of prestigious judges.

Diefendorf Capital Planning Associates (DCPA) has kept to the same philosophy throughout its 135-year history: strengthen families by addressing their financial needs. The company, which offers financial planning, wealth management, tax, insurance, and benefits services, "has always been about the customer, since my great-grandfather," says CEO Monroe Diefendorf. Now in its fourth generation, the company wanted to improve customer efficiencies to contend with bigger competitors, yet maintain its boutique, customer-centric approach. For more information, go to www.DiefendorfCapital.com.

Gartner is a global leader in technology consulting in 26 countries, speaking 47 languages. For more information, go to www.Gartner.com.