

Improving the Referral Funnel: How Crew Control Refreshed Targeting to Revitalize Conversions



The Challenge

- **Conversion Rates Repeatedly Below Targets and Customers Churning**
Crew Control was facing issues with customer conversion numbers lagging behind monthly targets at the beginning of fiscal year 2025. As the product has been intended to be a feeder product into the Aspire Core and ServiceTitan products, the margins for the product are lower with tight overhead costs (including handling churn customers). The product had a limited marketing budget, so initial focus would be on improving the sales funnel.

How A New Marketing Lead Tackled the Problems

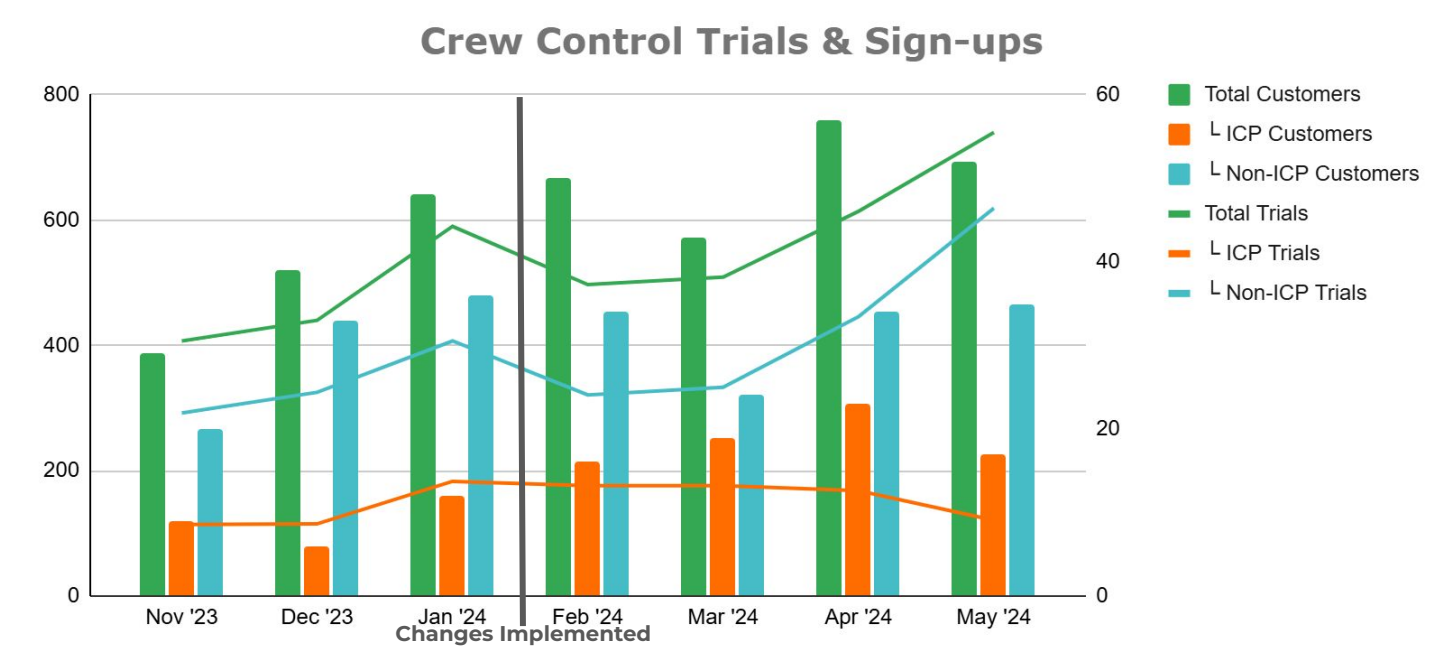
- **Updating the Ideal Customer Profiles and Segmentation**
In examining the data, there was a decreasing trend in ICP customer conversion rates, and the number of product trials started by non-ICP leads was approximately 250% higher than the number of ICP trials. We identified and prioritized the highest converting, least likely to churn customer segments to increase lead quality and focus on attracting customers most likely to “pay & stay” on CC. We updated the definition of ICP along with creating two separate ICP categories to prioritize based on the referring brands.
- **Developing Messaging for Underrepresented Prospect Personas**
As the customer personas were updated, we focused on improving trade specific messaging and prospect touch points to smooth the transition from other brands to the Crew Control sales process. The content messaging for the newer persona category was minimal, so by adding messaging that spoke to their experiences and needs along with ensuring they were not forgotten in the sales routing system, we created more touchpoints for sales to engage with the prospects.

The Payoff

- **Standardized the Sales and Marketing Funnel between Brand Referrals**
By digging into the sales team’s processes, we found many discrepancies in the outreach based on each method that leads signed up for the product trial. We created bandwidth efficient standards for sales team engagement and customer touchpoints. By automated sales sequencing initiation for all lead referral sources, we bucketed all incoming leads into two distinct email nurture funnels, and instituted demo webinar training for sales team instead of individualized phone calls which alleviated much of the sales teams spent per lead.

The Result

- **New Lead Categorization Improved Trial Signups and Conversion Rates**
In order to bring in more trial leads and focusing on improving the process for leads from internal referral sources, we honed in on smoothing the prospect journey from website landing page to trial signup to product education. Before this initiative, average trials started was 441 each month; average converted customers was 38 each month; averaged monthly customer conversion rate was 8.6%. After the changes were made and started to be implemented, average trials started was 590 each month; average converted customers was 51 each month



- +34% Increase in monthly product trial signups
- +34% Increase in monthly converted customers
- +5.4% Lift in conversion rate for ICP Leads



Crew Control
AN ASPIRE SOFTWARE SOLUTION

“I wanted to say my team and I have been really impressed with all the work you've been doing. All of your analysis and objectives are outstanding. I'm really excited to be working with you more closely and I'm excited for the positive changes to come.”

Scott Kavanagh, Crew Control
Product Manager.