

Use Case 3: BI in Customer Relationship Management

Business Case:

A print shop with outlets in different cities offers customers a variety of services. Customers are registered by a loyalty card. A survey was done in order to improve services according to customer needs and learning about the image of the company. About 2300 customers participated in the survey. For each customer age, sex, duration of the business relationship and usage type (either private or business user) is known. A user profile for long term customers is defined by three indicators: an indicator for sales, an indicator for the intensity of usage, and an indicator for duration of customer relationship.

Analysis Goals:

- Understanding actual sales of customers dependent on their user profile
- Prediction of usage of certain services dependent on customer characteristics
- Segmentation of customers with respect to usage of the different services

Data:

Three data sources are used: a customer data base (loyalty card), a transactional data base and a survey data base. Transactional data are aggregated at different temporal resolution (monthly, quarterly, annual). Additionally the indicators for long term customers are available.

Data Task:

- Proposal for setting up a data structure for the project

Business and Data Understanding Task:

Application Environment:

- Size and Scope of the business
- What kind of application scenario is possible?

Business Perspective:

- What are the business perspectives of interest?
- Who is the owner of the business process?
- Who are the process subjects

BI Views:

- What BI-Views are defined by the data?

Analytical goals:

- Formulate KPIs and find possible influential factors
- Formulate some analytical goals

Assessment of Data:

- Ideas for data assessment

Modeling Task:

- Do you have any ideas and proposals?

Analysis Task:

- Do you know any analysis techniques?