

CRM Use Case: Description

Business Case:

A company with outlets in different cities offers customers a variety of services. Customers are registered by a loyalty card. In order to improve services according to customer needs and learning about the image of the company a survey was carried out. 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: a indicator for sales, an indicator for the intensity of usage, and an indicator for duration of customer relationship. Usage of the services is known from the transaction database.

Goals:

The following KPIs are of interest for the company

- Sales of customers in dependence of their their usage profile
- Usage of the different services
- Customer profiles with respect to usage of the different services

Data Task:

Three data sources are used: a customer data base (loyalty card), a transactional data base and a survey data base. Business and data understanding is summarized in the following template.

CRM Use Case: Business and Data Understanding

Application Environment:

The use case considers a medium sized company with a large number of activities in the different services, which do not have many dependencies. The application scenario is using BI as feedback for strategy formulation (different services) and probably also as strategic resource (bundling and redefining services).

Business Perspective:

Corresponding to the sales orientation, main perspective is the customer perspective. The owner of the business processes is the company and the process subjects are the customers. Additionally personnel in the outlets are actors in the sales process.

BI Views:

All available data are cross-sectional data

Analytical Goals:

In that case the KPIs define the analysis goals estimation, segmentation and classification. Further analytical goals are description of customers and detecting interesting behavior.

Assessment of Data:

For obtaining cross-sectional data all transactional data were aggregated at different temporal resolutions (monthly, quarterly, annual). The description of the different sales variables and the identification of outliers is done as well as the description of the survey about user satisfaction.