

Business Insights from Simple Data Manipulations

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Tools for the Job



Spreadsheet tools eg Excel

FreeWare Development Studio for statistical analysis

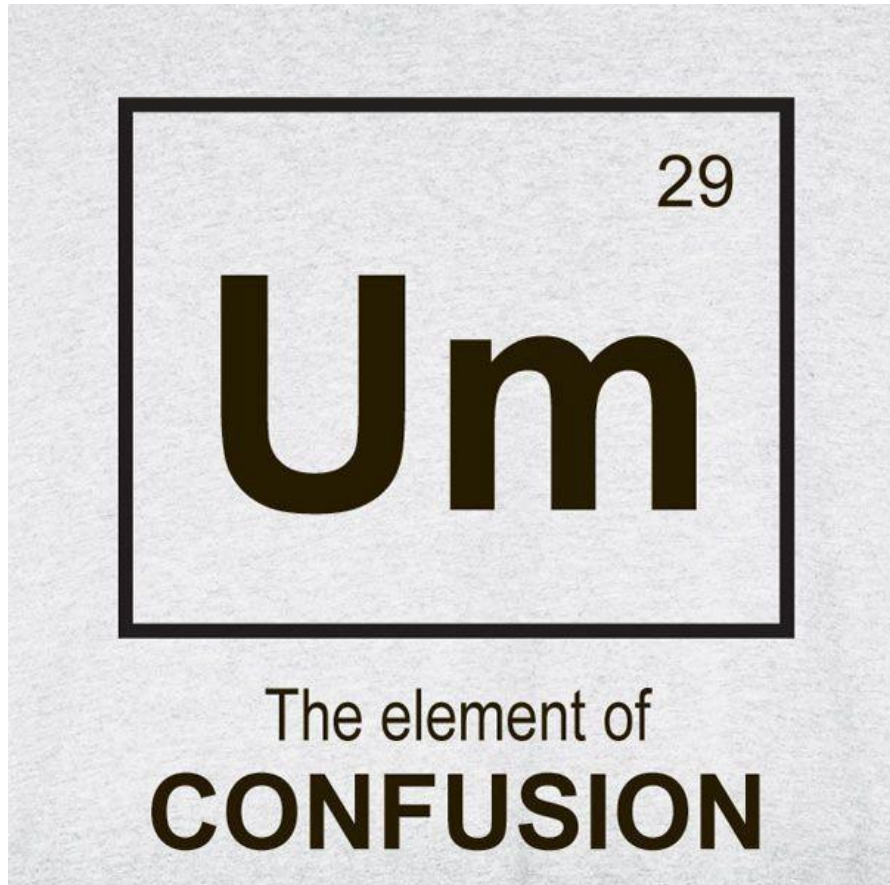


Powerful Microsoft Reporting Tool
Excel on steroids

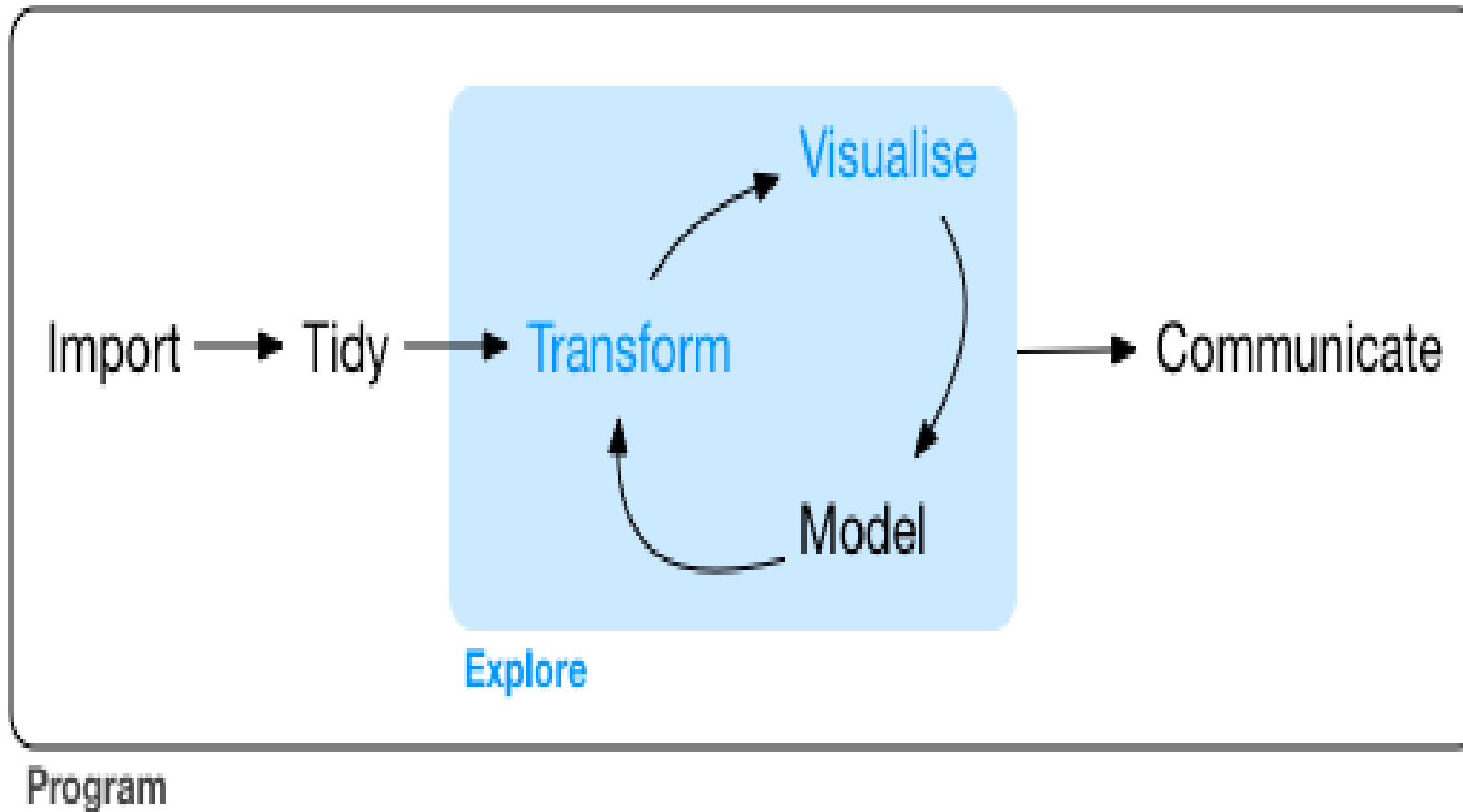


The Business Problem

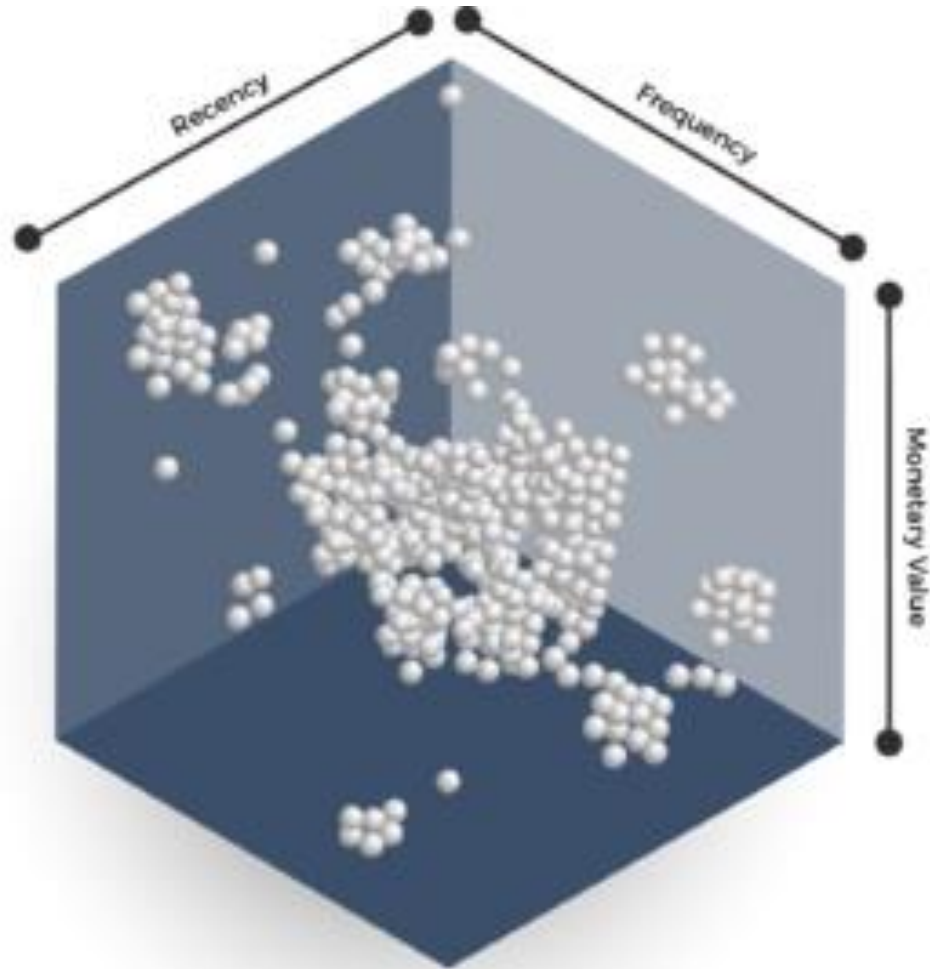
Customer Mindset?



Step 1: Data



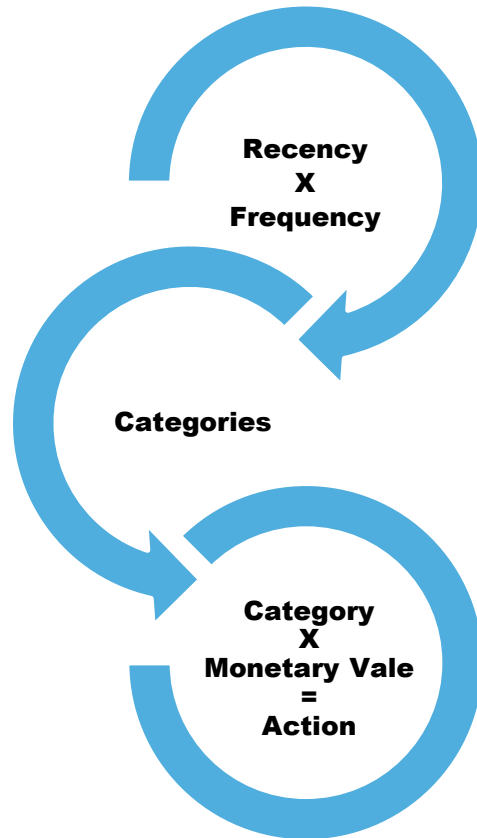
RFM Model



- **RECENCY**
- **FREQUENCY**
- **MONETARY VALUE**



Boiler Service RFM Example



Example 1
Recency: 1 Yr
Frequency: Bi-Yearly

Example 1
Category:
BIYEARLY_OFF

Example 1
MV: MEDIUM
ACTION:
INCENTIVISE
YEARLY BEHAVIOUR

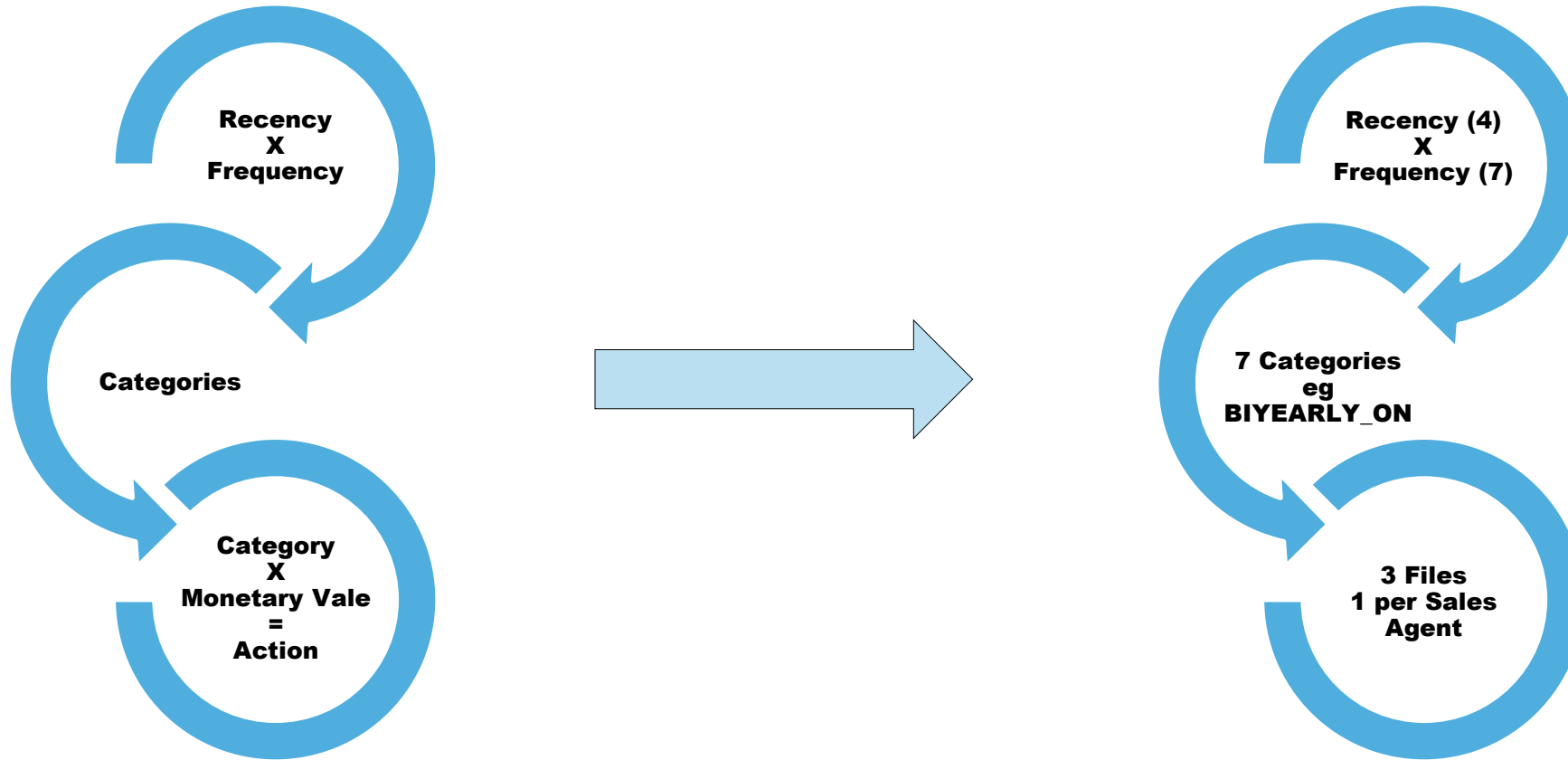
Example 2
Recency: 2 Yrs
Frequency: Bi-Yearly

Example 2
Category:
BIYEARLY_ON

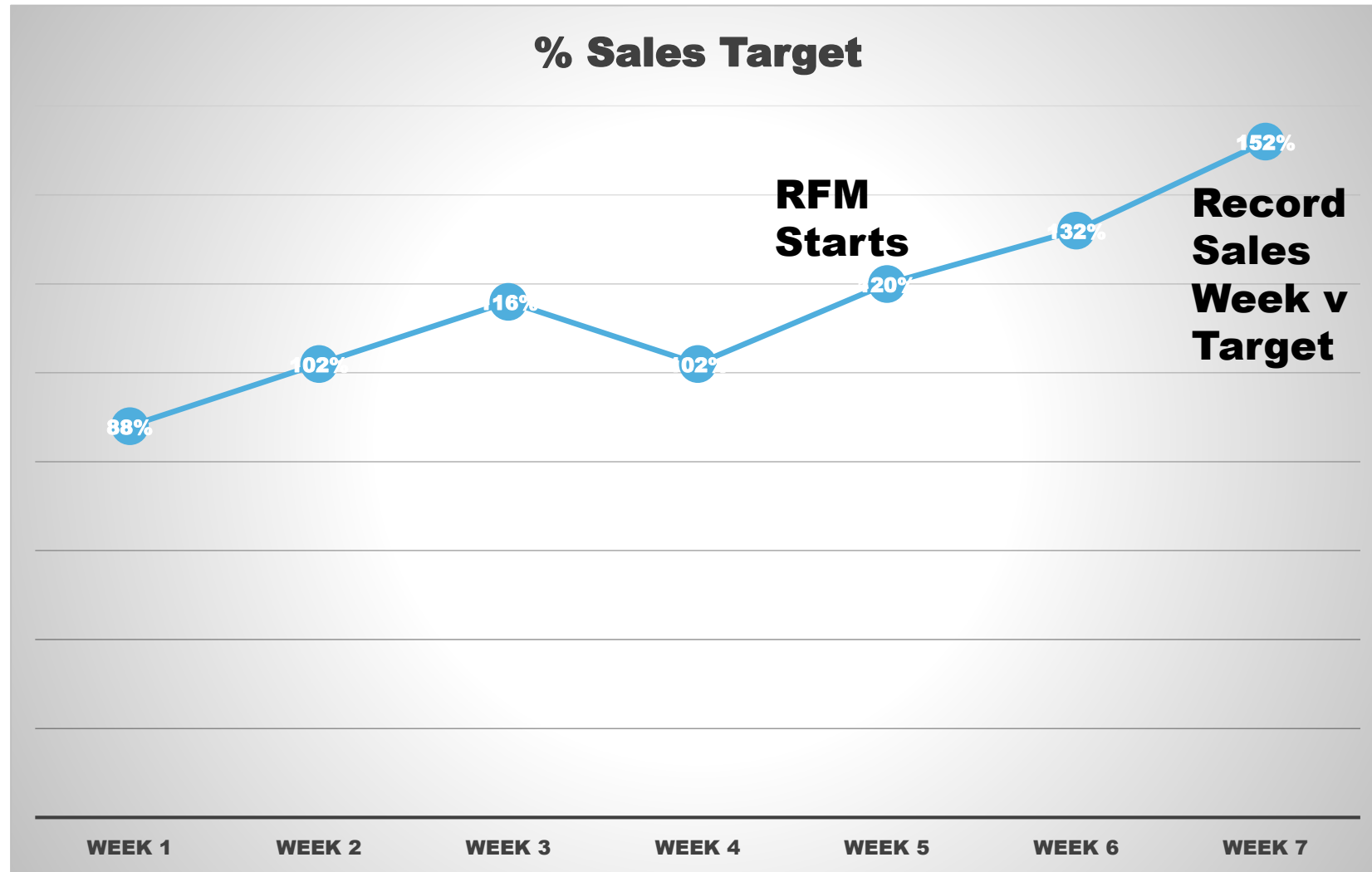
Example 2
MV: LOW
ACTION: UPSSELL



Keep It Simple



Business Impact



Using Sankey to identify Cost to Serve Opportunities

