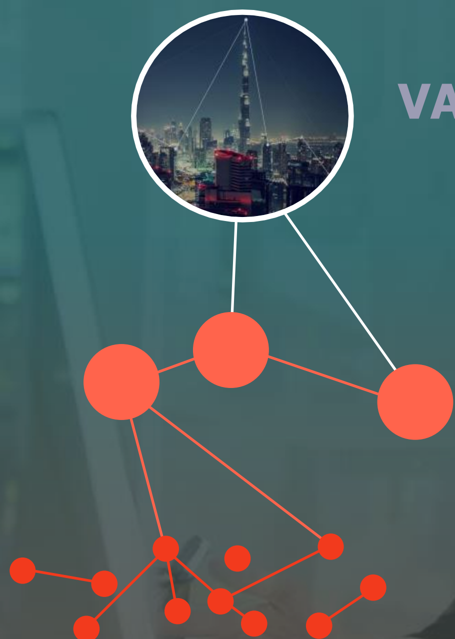
MERKLE



VALUE VS ENGAGEMENT

CUSTOMER HEALTHCHECK DASHBOARD

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VALUE VS ENGAGEMENT

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DREAM DO DELIVER

INTRODUCTION TO MERKLE ANALYTICS

We are a dedicated, performance unit of BI analysts, data scientists, data engineers, platform specialists and CXO consultants. We deliver results for our clients in marketing, business and customer analytics.

We have a growth mindset for our people and our clients.

We believe the future of business is customer experience. In crafting experiences so personal and valuable that you never have to shout to make customers listen. That data, technology and creativity hold the power to create experiences that make our lives better, easier, more meaningful, the power to make winners out of smart companies, and losers out of others.

We believe the future belongs to those who care, with fervent empathy, about the human truths in the smallest specks of data and who build experiences from that. But that's not what makes us Merkle. We do more than just 'believe'.

We drive progress.

And that's what makes us Merkle.

Our approach

We understand that every business is unique, with its own objectives, challenges and customers. That's why, for every client, we provide a bespoke solution, drawing on our specialist expertise across the following core disciplines:

Harness your data

Capturing, storing and accessing your data in the right way

- Optimise technology setup
- Cloud service engineering
- ML Ops and IoT

Learn from the past

Driving actionable insights from yesterday for a better tomorrow

- BI and visual Analytics
- Investigative Analytics

Predict the future

Go beyond that has happened in the past, predict what will happen next and take informed actions for the best outcomes

- Data Science and AI

Prescribe better outcomes

Understanding the best source of action to optimize all areas of your business

- Marketing Optimisation
- Experience Optimisation
- Business Optimisation

Embed the practice

Build, nurture and grow best in class teams

- Build your analytics team
- training

Drive the direction

Navigate the right path on your analytics journey

- Analytics Maturity and Roadmaps

Product overview

Get.
Grow.
Keep.

In the world of customer experience management, understanding the strength of your customer base is paramount to ensuring optimal experiences, increased loyalty and lifetime value.

The Customer Healthcheck Dashboard compliments our Customer Healthcheck so that you can keep your finger on the pulse of under or over-performing customers groups and make rapid decisions on changing behaviours and trends.

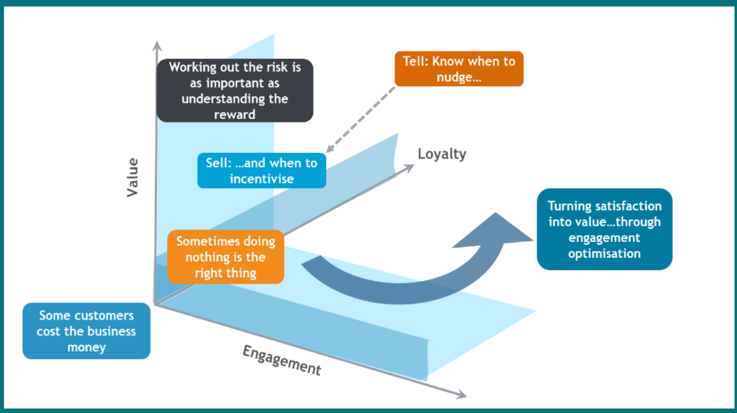
The Customer Healthcheck Dashboard focuses on the key metrics of Value, Engagement and Loyalty, and also allows you to dive into other customer base metrics. To make it fit your business, it can be delivered in Tableau, PowerBI, Qlik Sense or any other leading Gartner platform.

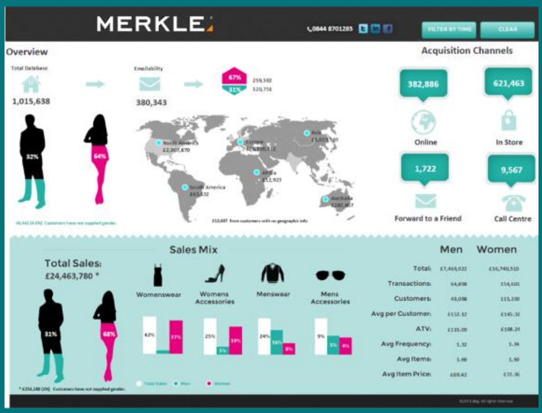
What is it?

This dashboard gives users the ability to view the 6-9 Healthcheck groups, created as part of the Healthcheck, at a granular level as well as showing the customer base.

Users have functionality allowing the comparative analysis of different Healthcheck groups over time. The Customer Healthcheck Dashboard's key metrics are Relationship length, Value and Engagement scores.

To further understand the health of your customer base the dashboard features also include; Volume changes, Acquisition Source, Churn and reason for churn, marketing preferences, demographics and any existing owned or 3rd party purchased segmentations.



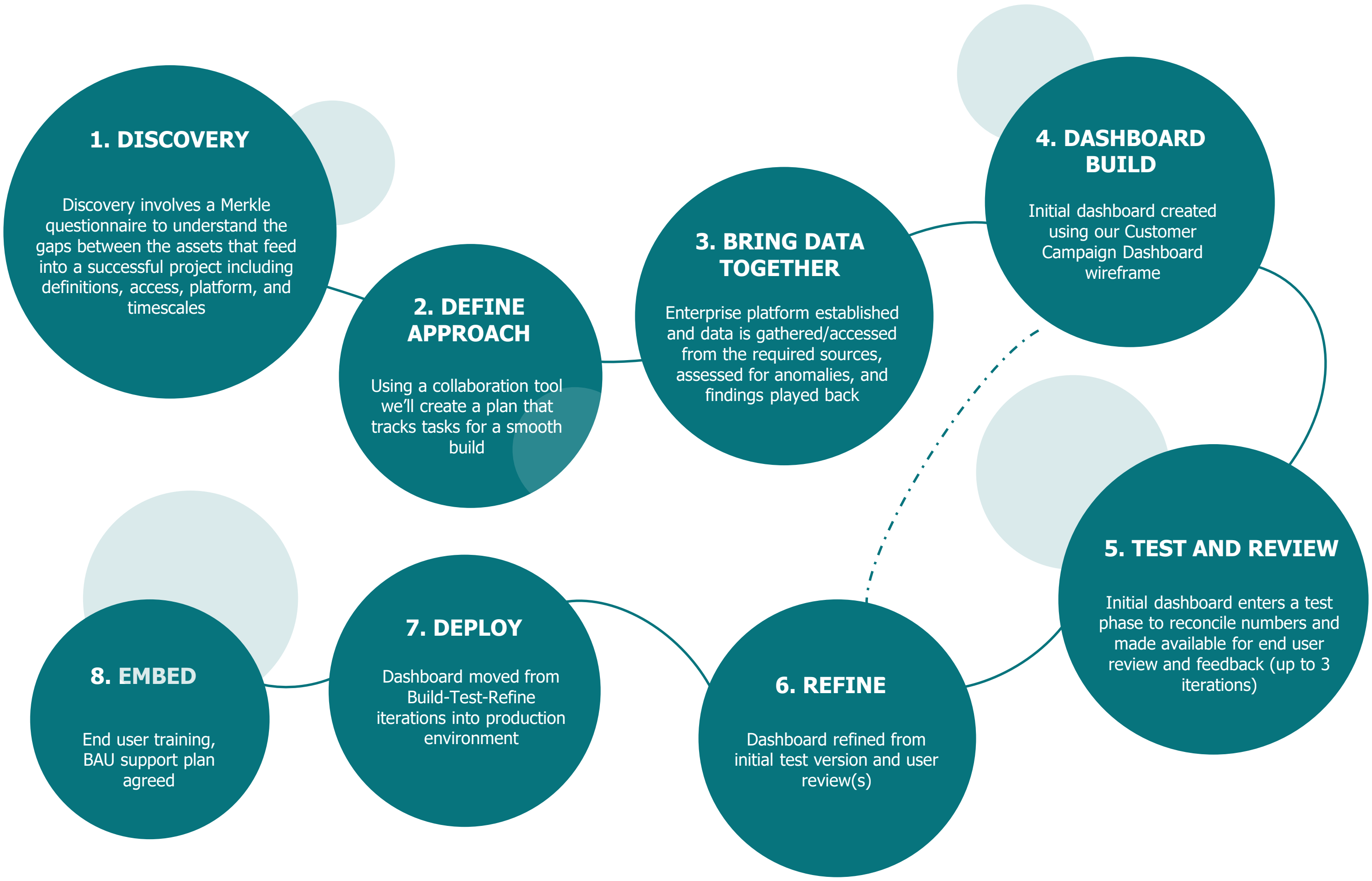


Who is it for?

B2C businesses whose customers typically make multiple purchases within an annual period.

The best results will come from retailers where consumers buy multiple products annually and have 1st party engagement tracking available i.e. fashion retailers, hospitality, travel and grocery.

How do you do it?



How will it help me and my business?

- Identify and describe first party customer audiences for activation
- Recognise those not engaging with the brand at different life stages
- Understand those at risk of churn and the size
- Who is generating the most value and who is under-performing
- Relationship between engagement and value
- Focus budget in areas of high and low investment
- Direction to improve customer experience against an optimal ROI

Next steps

What do I need to do?

The client needs access to their customer data with engagement data tagged and identifiable at an individual customer level. We'll need access to the following blocks of customer data: Demographics, Behavioural (engagement and sales), Contact Preferences, Acquisition Sources, Churn Reasons and Dates, Relationship Length and any existing Segmentation.

We'll need access to your data, or dependent upon capabilities, can receive data to build within our own BI environment.

What's included and what will I get?

- Questionnaire on gaps and assets output as a Q&A document and stakeholder mapping
- Stakeholder workshop: we will meet with you to establish use cases, agree key parameters such as scope and definitions and specify our access to your data
- Collaboration Tool: project created in existing or preferred collaboration tools such as Microsoft Teams, Basecamp, Jira to give visibility to progression, tasks, implements and ownership
- Platform Established: preferred BI platform stood up and made accessible to the client
- Customer Campaign Dashboard Wireframe: access to our optimised wireframe in business branding
- Iterative Build Cycle: three cycles of dashboard Build-Test-Refine
- Deployment: dashboard moved from build to a regularly refreshed production environment
- End user training, documentation, and walkthrough: role based BI training to ensure users maximise the features available to navigate and interrogate data
- User engagement reporting: always on usage statistics will highlight areas of low engagement and whether training or functionality is required
- Dashboard refreshes and support: ongoing data refreshes, user management, software upgrades and updates, data monitoring and optimisation.

How much does it cost?

This is not a stand-alone product and requires a Customer Healthcheck first. The combined cost of customer Healthcheck and Dashboard is £75k, one off build fee, £6k per month for platform rental, maintenance, hygiene checks, cut-off refreshes, end user licences and monthly update support (based on 10 end users). Exclusive of VAT.

As an add-on purchase this is £35k, one off build fee, £4k per month for platform rental, end user licences and monthly update support (based on 10 end users). Exclusive of VAT.
Reductions applied to monthly fees if client is hosting on own existing BI platform.

What might you consider next?

- Measurement workshop
- Customer Health CX Strategy
- Customer Campaign Dashboard
- Data Architecture Review
- First Party audiences applied to acquisition
- Propensity models to drive campaign performance

How long will it take?

Typically, a Customer Healthcheck Dashboard can be up and live within 5-6 weeks of sign off, subject to an agreed specification and approval from the client. Timings will vary based on where and how the solution is implemented, and when final data assessment is reached i.e. timings start from the point at which the data is made available.

Detailed project overview

#	Task & Description by Week		1	2	3	4	5	6	7	8	Who
1	Questionnaires - Shared with stakeholders - Key documentation shared - Responses assessed										Client, Merkle Analytics
2	Define Approach - Asset gaps and limitations reviewed - Project plan devised										Merkle Analytics
3	Access & Data Review - Data gathered/accessed from source - Dataset metadata identified										Merkle Analytics
4	Findings Playback & Kick off Meeting* - Agree variable definitions - Discuss exclusion groups, specific use cases - Analysis dataset metadata discussed										Client, Merkle Analytics
6	Dashboard Build - Initial dashboard creation in wireframe										Merkle Analytics
7	Initial Test & Review - Number reconciliation - End user review and feedback										Client, Merkle Analytics
8	Refinement - 2 more review and feedback iterations, if required - sign off for deployment										Client, Merkle Analytics
9	Go Live & Embed - Dashboard moved from Test to Live environment - End user training										Client, Merkle Analytics
10	Ongoing Management Meeting - Final playback - BAU Support plan agreed										Client, Merkle Analytics

Meet the team

Dan Wigley
Analytics Practice Lead UK

Dan is responsible for leading a team of 250+ specialists. He has over 13 years' experience in a wide variety of Data and Technology platforms, with an expertise in analytics and website optimisation. He has a proven track record and experience across a broad range of verticals having worked with over 100 of the UK's biggest brands

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David Spencer
Head of Analytics Sales UK

Strong experience in implementing both business and consumer led solutions, specialising in advanced analytical strategic sales, delivering high return on investment for clients, as well as great relationships.

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Siz Mahleka
Head of Business Intelligence

Professional long-term passion for all aspects of BI, from Data Warehousing and Engineering, Data Vis and Conversational Analytics/NLP. Leveraging technological complexities involved in harnessing, interpreting and presenting information from the end user’s experience

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Case study

QlikView deployment drives 50% rise in online sales for Ted Baker

Business challenge

Ted Baker's brand marketing team wanted to increase in-store data capture as part of a drive to improve knowledge of the brand's customer base, communication and targeting, with the aim of increasing relevancy, sales and engagement.

The marketing team needed the ability to see which customers were making purchases. With this insight, they would then be able to recruit more customers.

They also faced the challenge of getting sales assistants and store managers on board so that they could understand the benefits of collecting customer information, even if it did not necessarily impact on their own sales targets.

Merkle solution

We began working with Ted Baker to implement a reporting suite, driven by the QlikView Business Discovery solution. Over a period of 12 weeks, from initial discussions to live deployment, we delivered a Rolling Data Report (RDR), an in-store data collection report, and Reporting Studio - a more complex tool that analyses customer demographics through to sales and email campaigns.

Client outcome

- Increased workplace collaboration between colleagues.
- Enablement of informed decision making in near real time
- Clearly visualized campaign results demonstrating the value of well architected BI
- The ability to perform comprehensive analysis and reporting of data on over 1.2 million shoppers and prospective customers, delivering unprecedented insight into their profiles and spending behaviour.