NEED TO INCREASE SALES TO EXISTING CUSTOMERS?

Create a Self-Service Portal with SAS

A Digital Transformation Case Study: Upsell & Cross Sell

A midsize company had a plethora of installed products across thousands of clients. Since they were continuously innovating, their portfolio had grown complex with add-ons and many product combinations. Their goal was to identify which new products would deliver the most value, given each client's specific product combination.

Challenges

Data was scattered across multiple databases and reporting was manual and error prone. Even after multiple Excel spreadsheets were consolidated and manipulated, the data did not tell the complete story. Once shared with sales management, the Excel report raised more questions than it provided answers. However, the report did highlight the need for additional data and varying views. These requests prompted the analyst to seek a better solution and process.

Goals - 3 Views

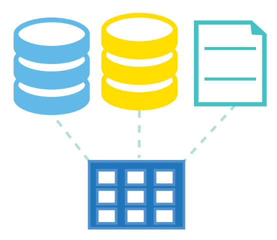
The company had 3 goals that were not possible with their current approach:

1. Create a self-service portal where each sales rep and sales manager could view and act on the product recommendations for each client.
2. Provide a holistic visual for management to identify common scenarios and repeatable offers across large volumes of clients.
3. Share the comprehensive view with marketing to orchestrate targeted campaigns.

Solution – Create a Self-Service Portal Using SAS

The company chose SAS to consolidate multiple extracts into a single view, which is not supported by visualization solutions that ingest data 'as is.' The company created visual dashboards, accessible by all users, using drag and drop and defined rules for their data - without requiring coding experience. What follows is their digital transformation journey.

BEFORE: QUERIES, EXPORTS, AND MANUAL DATA RE-STRUCTURING



Sales reps needed to analyze their customer accounts for upsell or cross sell opportunities. They relied on their individual experience and expertise to make customer recommendations based on their interpretation of the data - data which was in multiple places, often outdated, or incomplete. This lack of a consolidated view led to missed opportunities, incorrect offers, or no offers at all.

To create a comprehensive view, the business analyst ran queries and generated 3 exports into a consolidated Excel spreadsheet. Because multiple products could be purchased together, the analyst had to re-structure the data into primary and secondary product families. In other words, which product led the sale and which products followed. This re-structuring effort was manual, time intensive, and mistake prone. Unfortunately the effort did not provide the complete customer view that sales requested. However, the project did identify data gaps and the need to view data using different filters.

AFTER: 3 GOALS ACCOMPLISHED + NEXT LEVEL

Once the goals were identified for the self-service portal, the analyst mapped out the project and processes. The analyst imported the 3 data extracts into SAS into one data table. Two queries – set up once – matched product attributes for a comprehensive view. The data was then loaded into a portal and dashboards were created that allowed filtering by Sales Manager, Sales Rep, or unfiltered for a total view. Further filtering displayed industry, license, platform, sites, contract and more, which allowed a sales rep to narrow data to a customer or to a specific site. At this point, the analyst had successfully completed all 3 project goals.

Insights were immediate and the analyst recognized an opportunity to build on this foundation and expand. Looking at the high concentration of product combinations, the next step was to create logic for the upgrade or expansion options. The analyst set up 'if, then' rules and parameters to define potential customer options. This insight was added to the dashboard which allowed the sales rep to find potential customers for a specific upsell or cross sell product or to select a customer and explore multiple scenarios. Once a scenario was selected, the description and business rules displayed for further insight.

RESULTS

Double-digit Revenue Growth - 3 initiatives

1. Armed with a comprehensive view, sales management identified gaps in their program offers. With customer data consolidated, the team determined the revenue potential and business case for new products and services. Next, they worked with product management and professional services to create and price new repeatable offers. In parallel, new campaigns were planned and executed that included proposals, eblasts, and sales follow up.
2. Sales feedback has been positive. Reps appreciate the ease of use and information in one portal – a view of their accounts, ideal clients for new offers, and links to proposal templates, collateral and other resource systems - all to help the sales team make informed offers.
3. Though not initially planned, the analyst gave portal access to the customer contact center, so when a customer called, the specialist could quickly reference the customer's licensed products from a single view. The result: a more productive, valuable and personalized conversation with clients in less time.

A DIGITAL TRANSFORMATION CASE STUDY: UPSELL & CROSS SELL

To talk with SAS about supporting your digital transformation initiatives, reach out to the **contact center**

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