CUSTOMER LIFECYLE ANALYTICS

(In-home Care Service Provider)

Formulated logic to track customer journey, designed **Alteryx** workflows to ingest and transform data from external portal and developed **Tableau** dashboard to track Acquisition, Retention, and Attrition related KPIs considering *repeating* customers

CUSTOMER LIFECYCLE REPORTING FOR AN IN-HOME CARE SERVICE PROVIDER

ABOUT THE CLIENT

Client is a U.S-based in-home care service provider

SITUATION

- **The client relied on an online portal extracts to track its operational performance in terms of acquiring and retaining customers**. However, the reports were manual, subject to multiple iterations of ad hoc changes, and were presenting only the weekly snapshots, missing on historical trends, attritions and intermediate states between two consecutive reports.

- **Merilytics partnered with client to** formulate the comprehensive logic providing holistic view on the data covering multiple facets such as historical trends, daily snapshots, repeating customers, and attrition.

VALUE ADDITION

- Formulated the new logic to provide comprehensive view into **historical trends on acquisition, retention, and attrition of customers**

- Included **'Repeating Customers' insights** to depict the overall customer journey

- Tracked Operational efficiency via **'Fulfilment Rate' by tracking the hours served vs promised** and 'Zero Claim' tracking unserved instances

IMPACT

- Availability of dashboards with **daily updates reduced 6-7 hours of manual effort** and ensured precise reporting by excluding ad hoc request updates

- Customer lifecycle including 'Repeating Customers' presented insights into **customer satisfaction towards services and customer loyalty towards** the company brand

- Trends and insights on multiple granularity allowed better monitoring and operations tracking ranging from individual parameters to overall scale

CUSTOMER JOURNEY STATUS ROADMAP
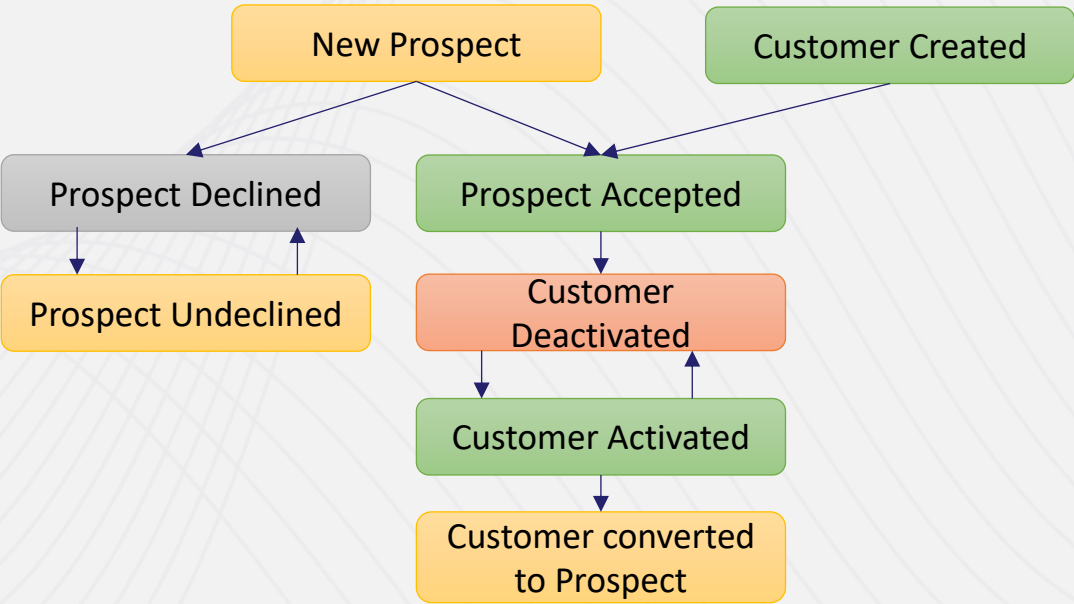
Customer Type	Event Desc
Prospect	New Prospect
	Customer Converted to Prospect
	Prospect Un-Declined
Admit	Prospect Accepted
	Customer Created
	Customer Activated
Decline	Prospect Declined
Attrition	Customer Deactivated

Flow diagram:

- New Prospect → Prospect Declined
- New Prospect → Prospect Accepted
- Customer Created → Prospect Accepted
- Prospect Declined → Prospect Undeclined
- Prospect Undeclined → Customer Deactivated
- Prospect Accepted → Customer Deactivated
- Customer Deactivated → Customer Activated
- Customer Activated → Customer Deactivated
- Customer Activated → Customer converted to Prospect

EXHIBIT 1: PROSPECTS

Prospects

Prospect Added Date	Sales Person	Payer Class	Branch	IntakeBy
5/1 5/7	(All)	(All)	(All)	(All)

Top ‘N’ selection governing the number of records in primary section of the visual to be displayed

Expand/Collapse option to display detailed or Top <N> records in visual

Internal filter to select Parameter governing the visuals below

Shows the # of Prospects by internal filter selection (Branch, Salesperson etc.,) and Top N selection

# of Prospects by Branch — Top 9 — Branch — Collapse

Top 10 Branch — Others

- Branch-1: 119
- Branch-2: 105
- Branch-11: 77
- Branch-3: 70
- Branch-12: 56
- Branch-10: 49
- Branch-13: 49
- Branch-14: 42
- Branch-9: 42
- Others: 147

# of Prospects by Class and Branch

	Grand Total	Class-1	Class-2	Class-3
Grand Total	861	686	133	42
Branch-1	119	112	7	
Branch-2	105	105		
Branch-3	70	49	14	7

Shows the # of Prospects by Class and internal filter selection (Branch, Salesperson etc.,)

Admits/Declines have the same associated visuals as that of Prospects

EXHIBIT 2: PROSPECT TRENDS

Prospect Trends(#) based on internal filter selection (daily/weekly/monthly /quarterly/yearly)

Internal Filter for selecting Daily/ Weekly/ Monthly/ Quarterly/ Yearly trend

Shows the Daily Avg. Prospect by *Weekday*

Top 'N' Prospects by internal filter selection (Branch, Salesperson etc.,)

Corresponding Numbers are displayed within each block

Current selection = Top 10
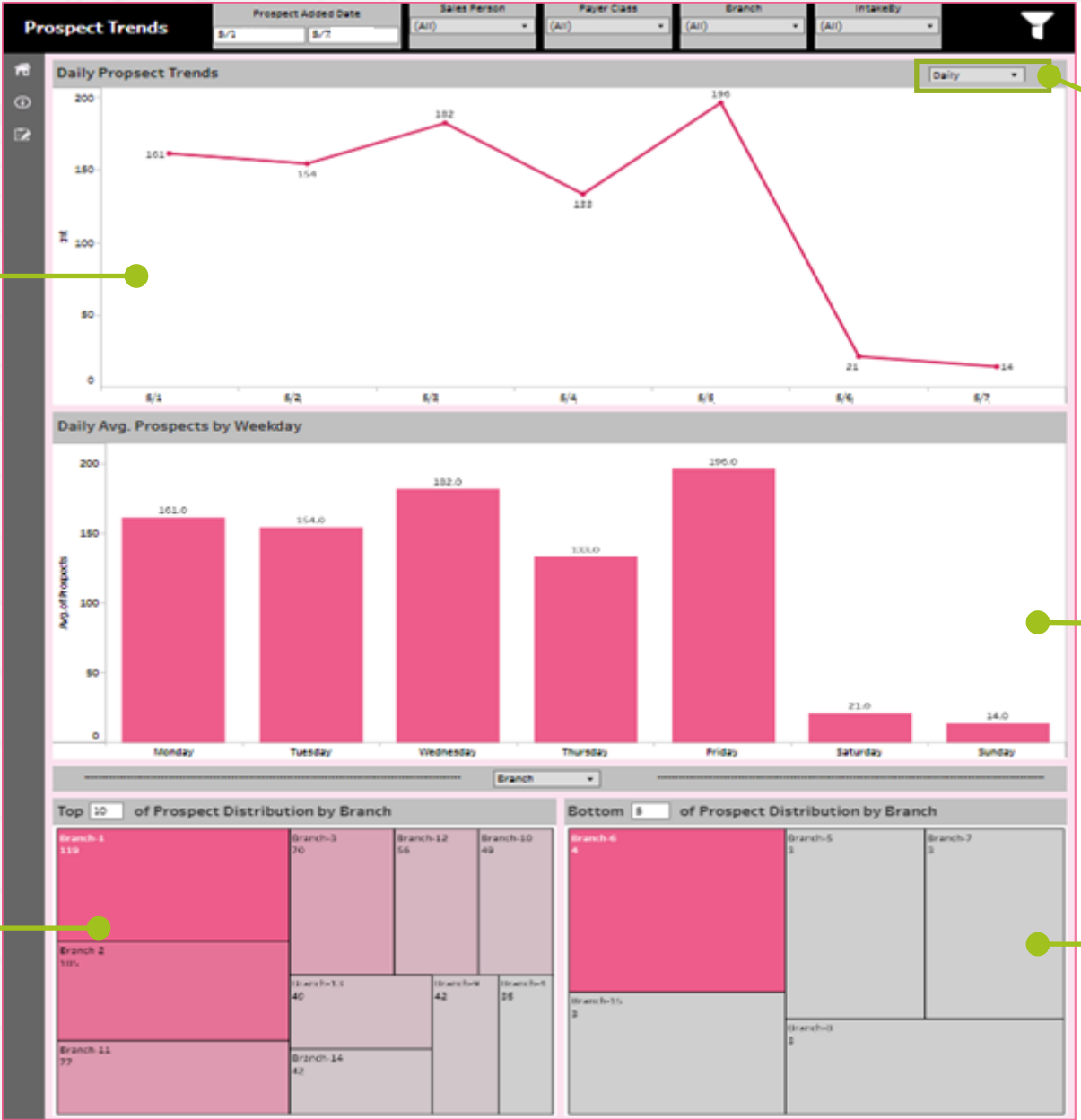
Bottom 'N' Prospects by internal filter selection (Branch, Salesperson etc.,)

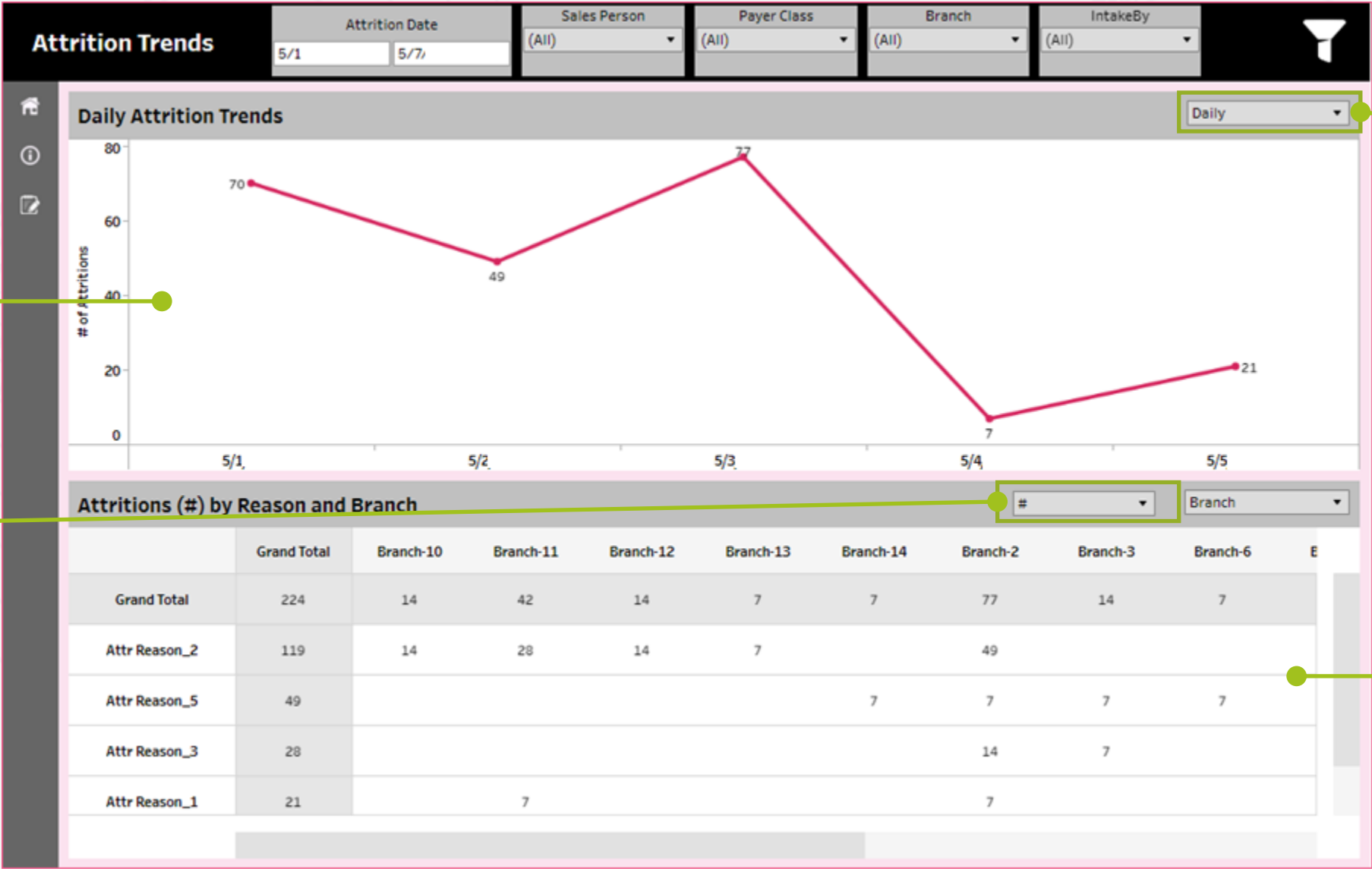**Corresponding Numbers are displayed within each block**

Current selection = Bottom 5

Admits Trends/Declines Trends have the same associated visuals as that of Prospect Trends

EXHIBIT 3: ATTRITION TRENDS

Internal Filter for selecting Daily/ Weekly/ Monthly/ Quarterly/ Yearly trend

Attrition Trends based on internal filter selection (daily/weekly/monthly/quarterly/yearly)

Internal filter to select tabular content in terms of **counts(#), rate of attrition(%), and avg. service days**

Shows the Attrition **(#/%/Avg. service days)** by Reason and internal filter selection (Branch, Salesperson etc.,)

Attrition Trends

Attrition Date	Sales Person	Payer Class	Branch	IntakeBy
5/1 5/7	(All)	(All)	(All)	(All)

Daily Attrition Trends — Daily

Attritions (#) by Reason and Branch — # — Branch

	Grand Total	Branch-10	Branch-11	Branch-12	Branch-13	Branch-14	Branch-2	Branch-3	Branch-6
Grand Total	224	14	42	14	7	7	77	14	7
Attr Reason_2	119	14	28	14	7		49		
Attr Reason_5	49				7	7	7	7	
Attr Reason_3	28						14	7	
Attr Reason_1	21		7				7		

EXHIBIT 4: PULSE REPORT
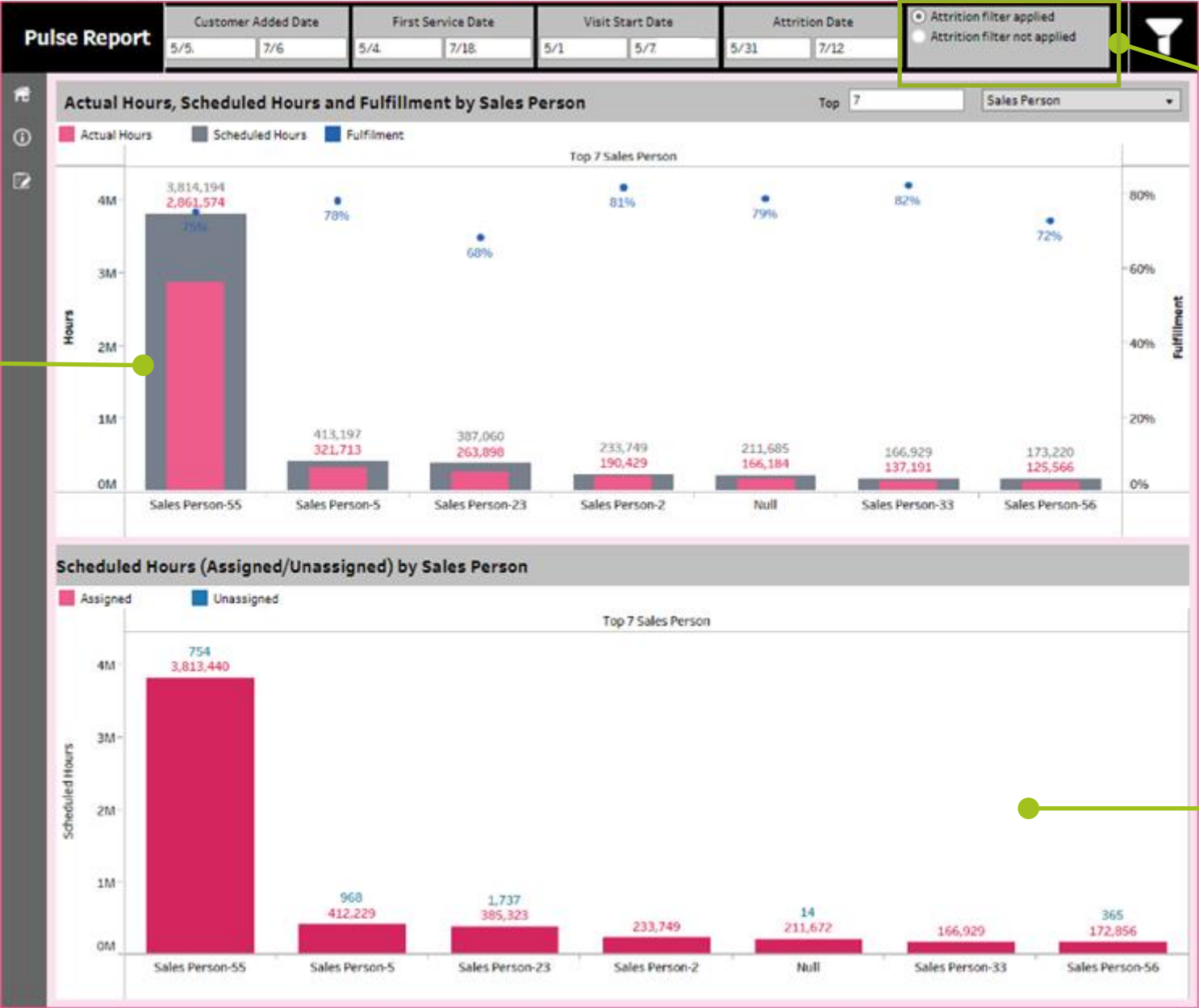
Top 'N' records by Actual Hours.

Provides insights into **Scheduled Hours, Actual Hours, and Fulfillment(%)** by internal filter selection (Salesperson, Branch etc.,)

Allows flexibility to apply or remove filter selection on 'Attrition Date'

Insights into '**Assigned' and 'Unassigned' Scheduled Hours** by internal filter selection (Salesperson, Branch etc.,)

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