SUCCESS STORIES - SUMMARY

Project Name	Client	Brief Description	Services
Customer Analysis	Commercial Real Estate Solutions Company	**Consolidated data from discrete data sources and various Line of Business** into a cloud based **integrated database** and analyzed it to **develop new business insights** related to its customer and broker-level performance trends	Performance Tracking & Reporting

CUSTOMER ANALYSES FOR A COMMERCIAL REAL ESTATE SOLUTIONS COM

ABOUT THE CLIENT

Company is a large **commercial real estate solutions** company that operates globally

SITUATION

- Company had a **large amount of data at its disposal** spread across **discrete databases**, but **did not have a consistent view of the performance baseline** in terms of its customers, revenue segments and its broker professionals

- Merilytics **partnered with the client team** to procure and consolidate the data into an **integrated database** and analyzed it to **develop new business insights** related to its customer and broker-level performance trends

VALUE ADDITION

- **Consolidated discrete data sources** (from Finance, Market and LOBs) that capture customer, broker and transaction level information in various forms

- Set up a client-owned **cloud-based secure environment** for creating the integrated database to conduct analysis efficiently

- Conducted various analyses related to **customer value, share of wallet, cross-sell, retention and value addition. Also, developed insights related to drivers of brokers' performance**

- Synthesized in to crisp, **executive level document;** developed **list of data issues, methodology documents** and transitioned to client at end of the engagement

IMPACT

- The robust consolidated database **provides access to client for further analyses** per the client's evolving business needs

- Insights and methodology documents helped client better understand the landscape and **make informed business decisions by the LOBs**

SCOPE OF WORK FOCUSED ON CUSTOMER ANALYTICS

S. No.	Questions
1	How many years of data is present by LOB?
2	Who are our highest value clients (revenue and profit)?
3	What are the characteristics of the highest value clients?
4	What is our top-100 clients' share of wallet (by revenue, deal count, assets) and penetration (# products and services sold)?
5	What are the characteristics of clients with highest / lowest share of wallets and penetration rates?
6	What is our product/service cross-sell ratio, across LOBs, by client?
7	What are the primary factors driving the highest and lowest cross-sell ratios?
8	What is the level of client stickiness?
9	What are the primary factors driving the highest and lowest client retention ratios?
10	Are our clients better off when we manage their portfolio, sell their assets, etc.?
11	What are the primary factors driving outperformance or underperformance?
12	Who are our most valuable field professionals?
13	What are the characteristics of our top and bottom decile professionals?

- Seven years of data across five systems for three LOBs was analyzed to draw insights
- Identified top and bottom customers and characteristics of performance, for about 6,000 customers in portfolio
- Analyzed cross-sell behavior by combinations of services and LOBs
- Analyzed retention and drivers of stickiness