

SMARTSTREAM TECHNOLOGIES

PROJECT BRIEF: Customer Behaviour Analytics & Strategic Recommendations

Date: August 15, 2025

Project Timeline: 3 weeks (Due: September 5, 2025)

Prepared by: Jennifer Martinez, VP of Marketing

Project Sponsor: David Chen, Chief Marketing Officer

ABOUT SMARTSTREAM

SmartStream is a rapidly growing digital retailer specialising in smart home technology. We offer an extensive range of products, including smart thermostats, security cameras, smoke detectors, and connected lighting solutions. Our products are distributed exclusively through our online platform, supported by customer subscriptions, targeted promotional campaigns, and strategic third-party partnerships.

Our mission is to deliver innovative, high-quality smart home solutions that enhance user comfort, convenience, and security. As we continue to scale, understanding customer behaviour and optimising personalised marketing strategies has become critical to maintaining our competitive advantage.

PROJECT BACKGROUND

Following your excellent work on our initial customer analysis project, our executive team has reviewed your findings and identified several strategic areas requiring deeper investigation. We were particularly impressed with your data-driven approach and actionable insights.

We're now looking to expand this analysis to better understand customer segmentation, behavioural patterns, and opportunities for enhancing both engagement and revenue. This project will directly inform our Q4 marketing strategy and 2026 planning cycle.

BUSINESS OBJECTIVES

We need your expertise to help us answer critical business questions that will shape our marketing investments and customer experience initiatives. Specifically, we're looking for insights in the following areas:

1. Loyalty Program Performance Analysis

We've invested significantly in our tiered loyalty program (Bronze, Silver, Gold), but we need to understand if it's actually driving different customer behaviours.

Key Questions:

- Are customers at different loyalty tiers behaving differently in meaningful ways?
- How do purchase frequency, spending patterns, discount usage, and engagement levels vary across tiers?
- Are we seeing the ROI we expect from our loyalty investments?

Please examine purchase frequency, total and average spending, discount application rates, chatbot engagement, and communication patterns across all loyalty levels, including non-members.

2. Customer Behavioural Segmentation

We need to identify distinct customer segments and understand their unique characteristics to enable more targeted marketing.

Key Questions:

- What meaningful patterns exist across different customer demographics (gender, tenure, etc.)?
- How do communication preferences and channel usage vary across segments?
- Can we identify high-value segments that deserve specialised attention?

We encourage you to apply RFM analysis or other segmentation frameworks you deem appropriate. We're particularly interested in understanding how customer tenure and demographics correlate with engagement preferences.

3. Data Gaps & Opportunities

As we plan our data infrastructure investments for 2026, we need your perspective on what's missing.

Key Questions:

- What critical data points are we not currently capturing that could enhance this analysis?
- What additional customer information would provide deeper insights into behaviour and preferences?
- Are there external data sources we should consider integrating?

This is a strategic question—we're looking for your expert opinion, not additional analysis.

4. Strategic Recommendations

Based on your complete analysis, we need actionable recommendations that our marketing and product teams can implement.

What We Need:

- Clear summary of key insights and behavioural patterns discovered
- Identification of specific opportunities to enhance customer engagement and drive sales growth
- Discussion of potential marketing challenges we should be aware of
- **Two concrete, data-driven recommendations** that we can action in Q4 2025
- Suggestions for marketing analytics strategies or approaches we should consider implementing

We're open to creative solutions—if traditional approaches don't fit our business model, please propose alternatives and explain your reasoning.

DATA ASSETS AVAILABLE

Our data team has prepared two cleaned datasets for this engagement:

Customer Dataset (Customer_AT2.csv)

Contains customer profile and engagement data:

- Customer identifiers and demographics (Gender, Tenure)
- Loyalty program status and tier
- Digital engagement metrics (Chatbot usage, email opens, ad clicks)
- Marketing responsiveness indicators
- Communication preferences and survey participation
- Referral likelihood scores

Transaction Dataset (Transaction_AT2.csv)

Contains complete transaction history:

- Transaction details (dates, amounts, quantities)
- Product information (SKU, category, descriptions)
- Pricing and discount data
- Coupon usage and codes
- Payment and shipping details
- Customer satisfaction ratings

Note: Both datasets link via Customer_ID. The datasets have been cleaned and validated by our data engineering team. Not all variables may be relevant to every analysis question—use your judgment to select the most appropriate fields.

DELIVERABLES

We require two submissions:

1. Analysis Documentation

A comprehensive document showing your analytical queries and methodology. This should be well-organised by business question and demonstrate your analytical approach. We use Google BigQuery (Google Cloud Platform) internally, so please conduct your analysis using this platform for compatibility with our systems.

2. Executive Report

A strategic report written for our executive leadership team. Please note:

- **Audience:** Our C-suite and senior marketing leaders do not have formal analytics training. Use clear, accessible language.
- **Technical terms** like "segmentation," "RFM analysis," "correlation," etc., should be briefly explained when first introduced.
- **Length:** Approximately 2,000 words (we understand some flexibility may be needed—1,800-2,200 words is acceptable)
- **Structure:**
 - **Section 1:** Key findings and insights from your analysis
 - **Section 2:** Two strategic recommendations with supporting rationale
- **Tone:** Professional, concise, and action-oriented

The report should stand alone—assume readers won't have access to your detailed analysis documentation.

SUCCESS CRITERIA

Strong submissions will:

- Provide distinct, well-differentiated recommendations
- Ground all recommendations in clear data evidence
- Consider multiple analytical angles and perspectives
- Present insights that balance sophistication with accessibility
- Demonstrate deep understanding of our business context
- Offer practical, implementable solutions

TIMELINE

- **Project Start:** August 15, 2025
- **Analysis Period:** August 15 - September 5, 2025
- **Deliverables Due:** September 5, 2025 by 8:00 PM AEST
- **Executive Presentation:** Week of September 9, 2025 (TBD)

POINT OF CONTACT

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CONFIDENTIALITY

This brief and all associated data are confidential and proprietary to SmartStream Technologies. All analyses and findings should be treated as confidential business information.

We're excited to continue our partnership and look forward to your insights. Your previous work has already influenced several of our strategic decisions, and we're confident this next phase of analysis will be equally valuable.

Please don't hesitate to reach out if you need any clarification on our business context or analytical requirements.

Jennifer Martinez

VP of Marketing

SmartStream Technologies