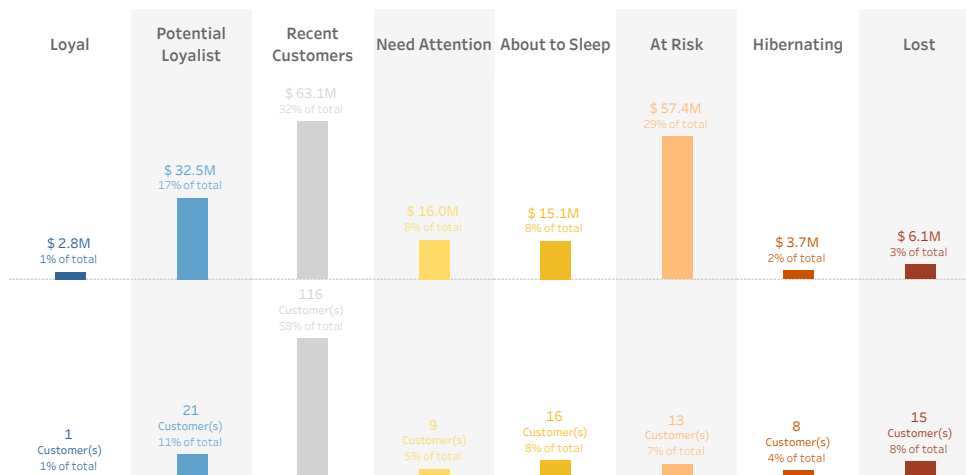




RFM Analysis

Salesforce



I want to:

Revive

Customer base

Deep-dive

Customer base

RFM Segment

Start >>

RFM Analysis (Customer Segmentation)

Customer
All

Filter 2
All

Filter 3
All

Filter 4
All

RFM stands for Recency, Frequency, and Monetary value, each corresponding to a key customer trait. These RFM metrics are important indicators of a customer’s behavior because frequency and monetary value affects a customer’s lifetime value, and recency affects retention, a measure of engagement.

How is our Customer base segmented? What are the recommended marketing actions to address each Customer segment?

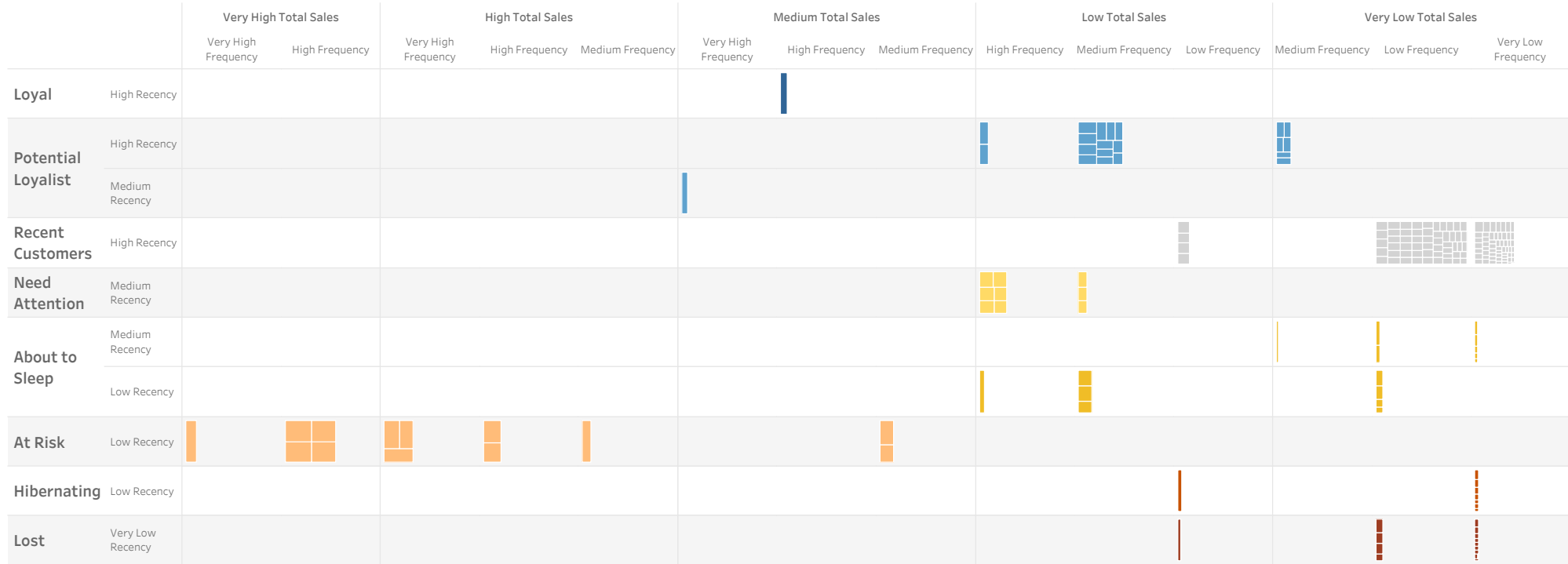
Segment	Characteristics	Total Sales	Active Customers #	Recommended Actions	One square per Customer (sized and colored by Total Sales)
Loyal	Spend good money with us often. Responsive to promotions.	\$ 2.8M 1% of total	1 Customer(s) 1% of total	Upsell higher value products. Ask for reviews. Engage them.	
Potential Loyalist	Recent customers, but spent a good amount and bought more than once.	\$ 32.5M 17% of total	21 Customer(s) 11% of total	Offer membership / loyalty program, recommend other products.	
Recent Customers	Bought most recently, but not often.	\$ 63.1M 32% of total	116 Customer(s) 58% of total	Provide on-boarding support, give them early success, start building relationship.	
Need Attention	Above average recency, frequency and monetary values. May not have bought very recently thou...	\$ 16.0M 8% of total	9 Customer(s) 5% of total	Make limited time offers, Recommend based on past purchases. Reactivate them.	
About to Sleep	Below average recency, frequency and monetary values. Will lose them if not reactivated.	\$ 15.1M 8% of total	16 Customer(s) 8% of total	Share valuable resources, recommend popular products / renewals at discount, reconnect with them.	
At Risk	Spent big money and purchased often. But long time ago. Need to bring them back!	\$ 57.4M 29% of total	13 Customer(s) 7% of total	Send personalized emails to reconnect, offer renewals, provide helpful resources.	QualServe Cole LLC Nolan Inc Littel-Collins
Hibernating	Last purchase was long back, low spenders and low number of orders.	\$ 3.7M 2% of total	8 Customer(s) 4% of total	Offer other relevant products and special discounts. Recreate brand value.	
Lost	Lowest recency, frequency and monetary scores.	\$ 6.1M 3% of total	15 Customer(s) 8% of total	Revive interest with reach out campaign, ignore otherwise.	



RFM Analysis (Customer Segmentation): Customer Base

RFM stands for Recency, Frequency, and Monetary value, each corresponding to a key customer trait. These RFM metrics are important indicators of a customer’s behavior because frequency and monetary value affects a customer’s lifetime value, and recency affects retention, a measure of engagement.

Which Customers constitute each of our RFM segments?



one square per Customer, sized by Total Sales



RFM Analysis (Customer Segmentation): Segment Detail

Customer
All

Filter 2
All

Filter 3
All

Filter 4
All

RFM Segment About to Sleep

Segment

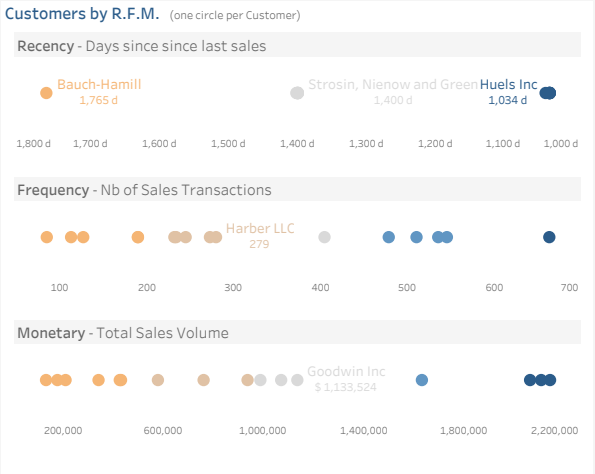
Characteristics

About to Sleep

Below average recency, frequency and monetary values.
Will lose them if not reactivated.

Recommended Marketing Actions »

Share valuable resources, recommend popular products / renewals at discount, reconnect with them.



Which Customers belong to this RFM segment?					
Customer→	RFM Profile	RECENTY	FREQUENCY	MONETARY	Sales over time
Active Data	232	1,400 d Low Recency	535 Medium Frequency	\$ 2,143,022 Low Total Sales	
Spencer-Ratke	232	1,400 d Low Recency	478 Medium Frequency	\$ 2,107,550 Low Total Sales	
Strosin, Nienow and Green	242	1,400 d Low Recency	663 High Frequency	\$ 2,063,277 Low Total Sales	
Kreiger and Sons	232	1,400 d Low Recency	545 Medium Frequency	\$ 1,631,093 Low Total Sales	
Goodwin Inc	221	1,400 d Low Recency	272 Low Frequency	\$ 1,133,524 Very Low Total Sales	
Harber LLC	321	1,034 d Medium Recency	279 Low Frequency	\$ 1,068,901 Very Low Total Sales	
Huels Inc	331	1,034 d Medium Recency	510 Medium Frequency	\$ 985,868 Very Low Total Sales	
Rodriguez Group	221	1,400 d Low Recency	231 Low Frequency	\$ 934,654 Very Low Total Sales	
Russel and Sons	321	1,034 d Medium Recency	404 Low Frequency	\$ 759,108 Very Low Total Sales	
Kovacek-Lubowitz	221	1,402 d Low Recency	244 Low Frequency	\$ 576,610 Very Low Total Sales	
Lockman-Collins	311	1,034 d Medium Recency	189 Very Low Frequency	\$ 429,223 Very Low Total Sales	
Bauch-Hamill	221	1,765 d Low Recency	233 Low Frequency	\$ 424,267 Very Low Total Sales	
Stiedemann Group	311	1,040 d Medium Recency	189 Very Low Frequency	\$ 339,428 Very Low Total Sales	
		Days since last sale	Nb of Sales Transactions	Total Sales Volume	Order Date



Adhoc Analysis

Customer
All

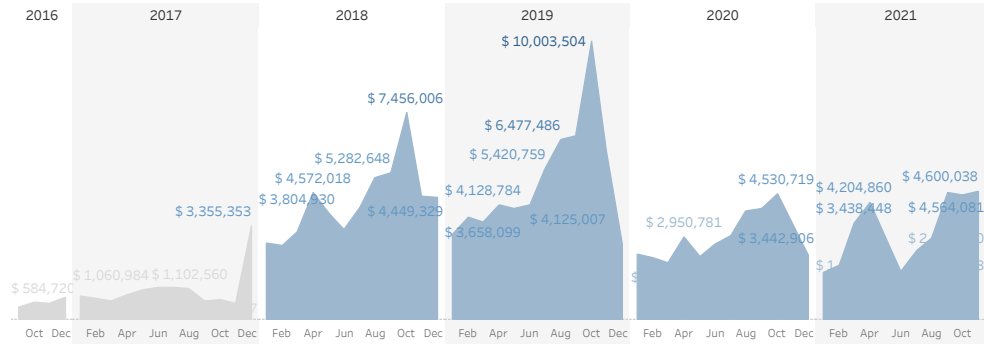
Filter 3
All

Order Date
01/01/2014 00:00:00 to 31/12/20..

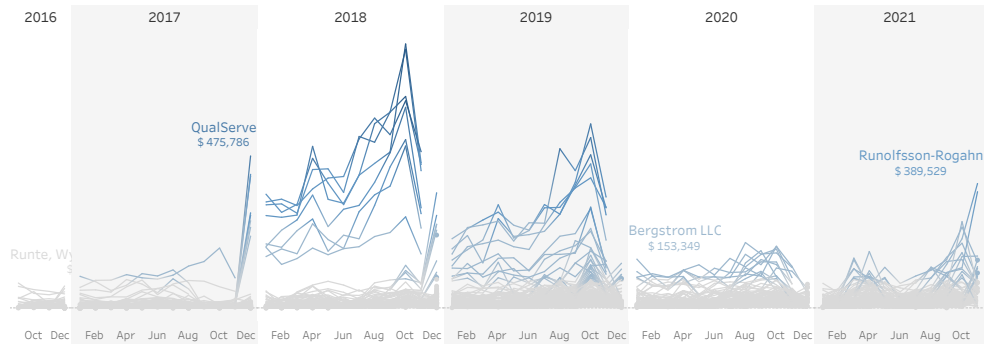
Filter 2
All

Filter 4
All

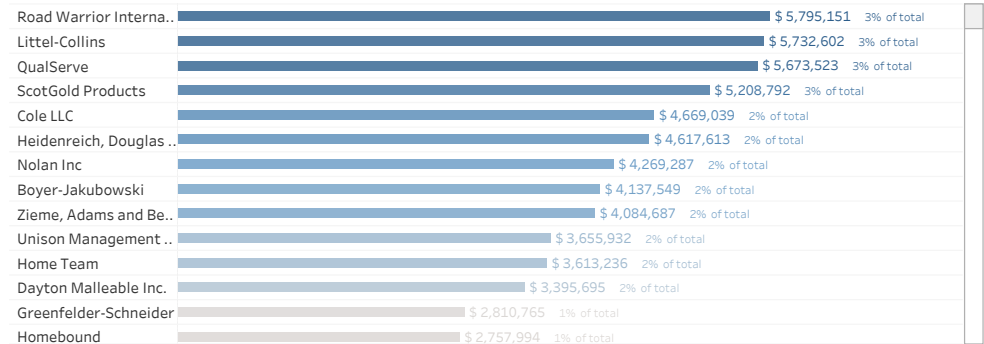
Total Sales Trends



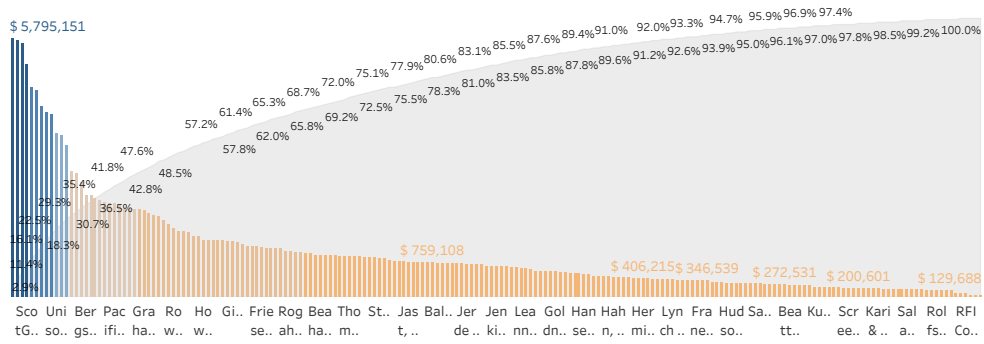
Total Sales Trends by Customer



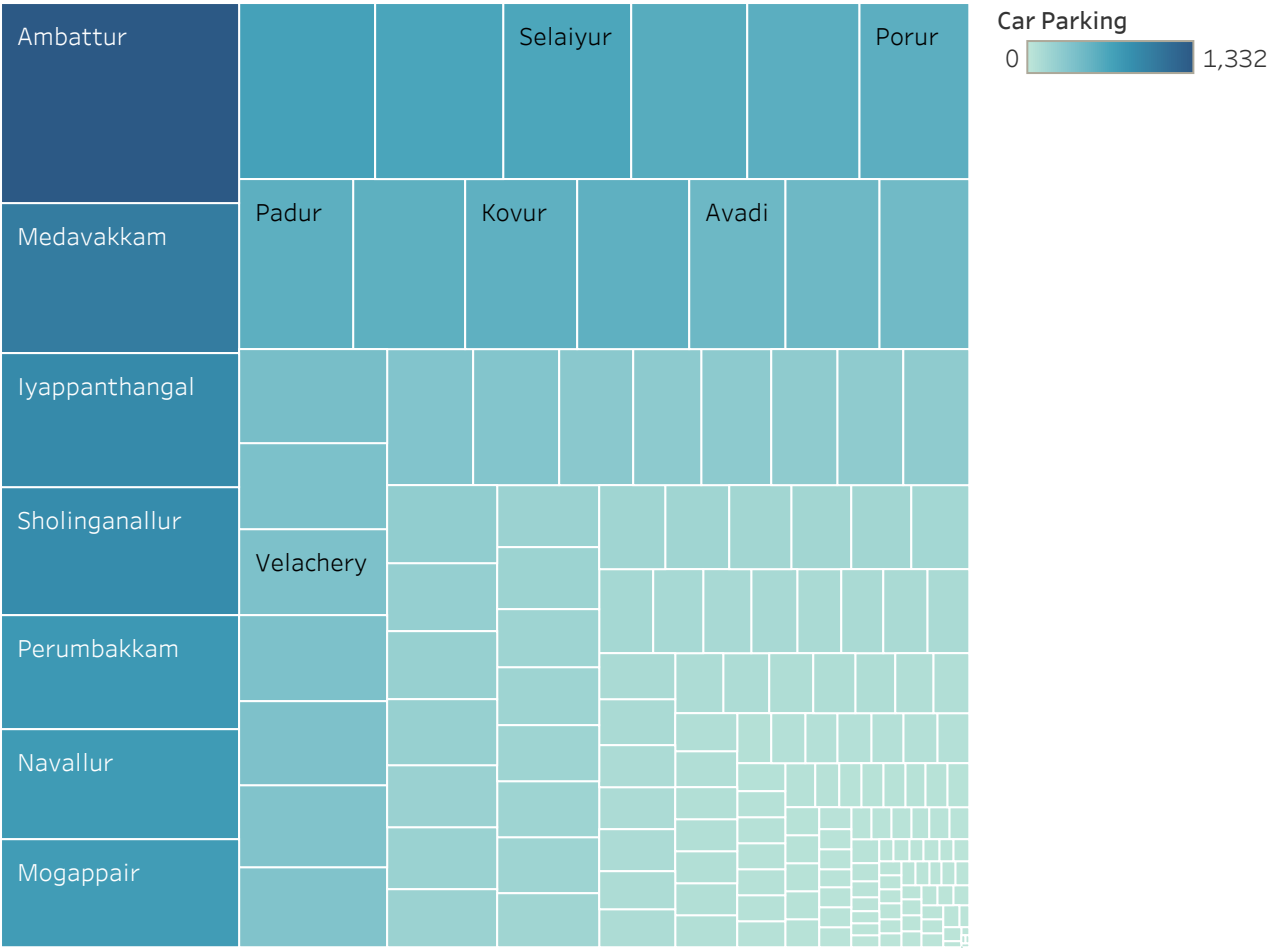
Total Sales by Customer



Pareto Analysis - A small percentage of causes can have an outsized effect

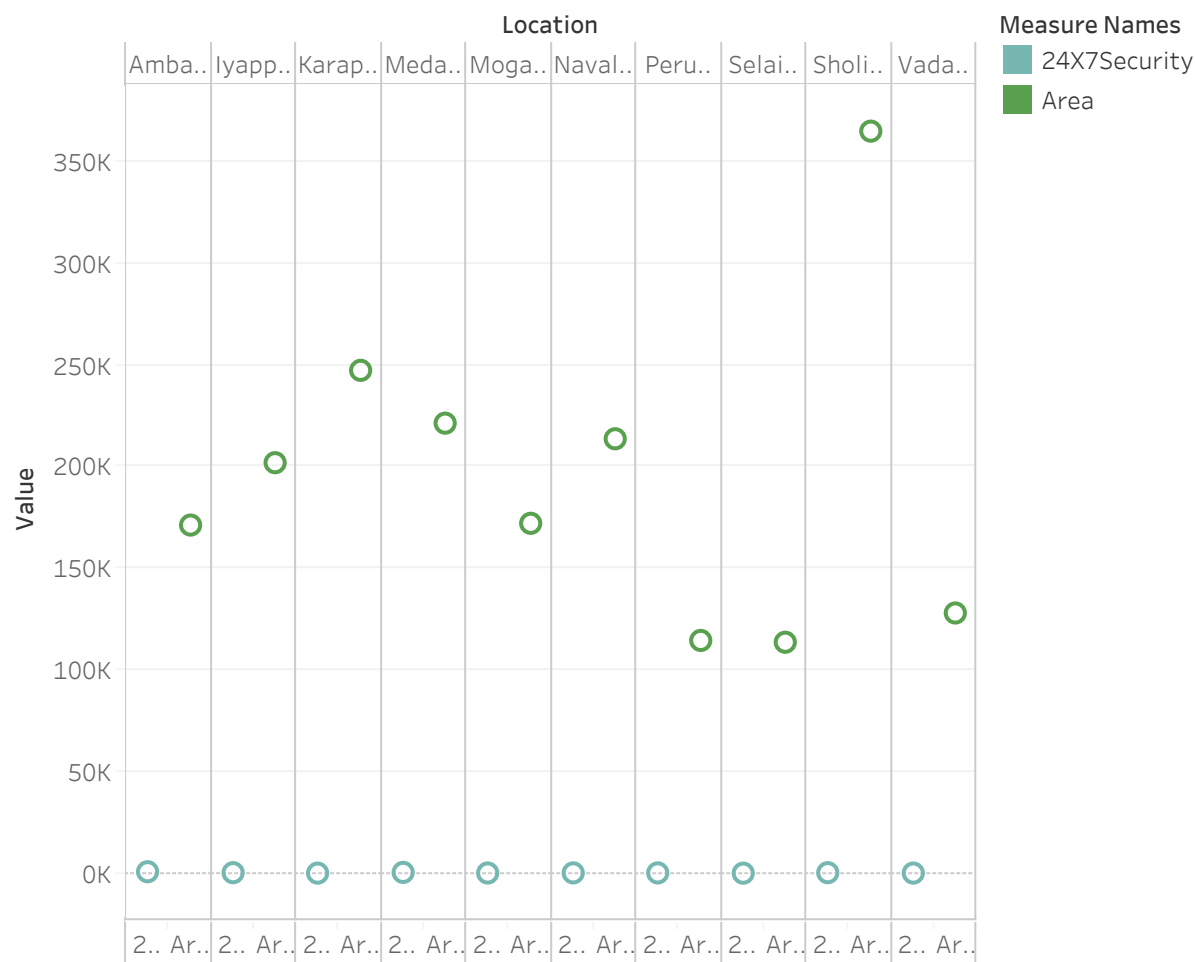


AREA WITH CAR PARKING



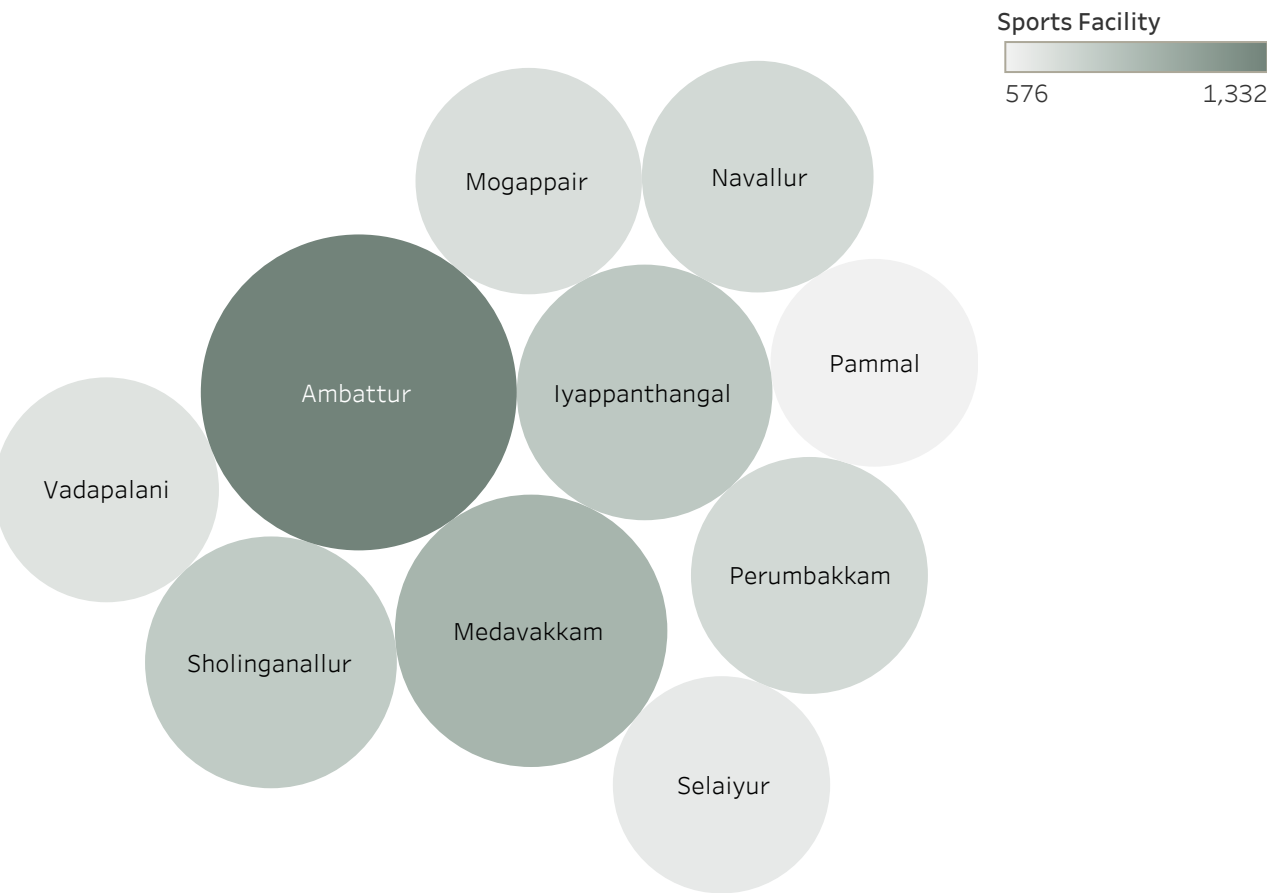
Location. Colour shows sum of Car Parking. Size shows sum of Car Parking. The marks are labelled by Location.

TOP 10 SECURITY AREAS IN CHENNAI



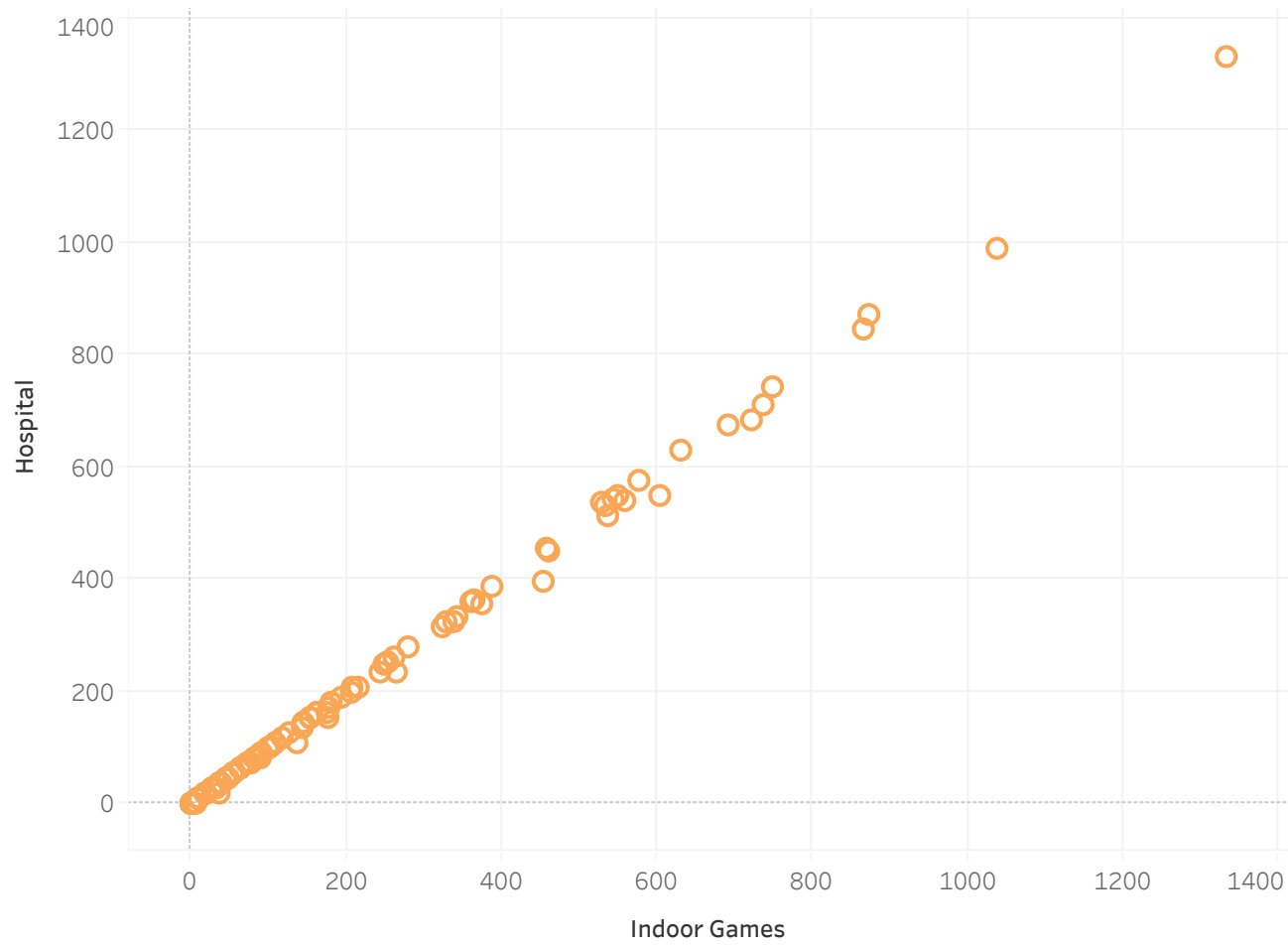
24X7SecurityandArea for each Location. Colour shows details about 24X7SecurityandArea.The view is filtered on Location, which keeps 10 of 185 members.

TOP 10 SCHOOLS IN AREAS



Location. Colour shows sum of Sports Facility. Size shows sum of School. The marks are labelled by Location. The view is filtered on sum of School and Location. The sum of School filter ranges from 10 to 1,332. The Location filter keeps 10 of 185 members.

HOSPITALS AND INDOOR GAMES



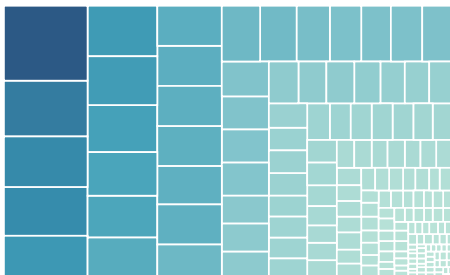
Sum of Indoor Games vs. sum of Hospital. Details are shown for Location.

ATM WITH LOCATION



Location. Size shows sum of ATM. The marks are labelled by Location.

AREA WITH CAR PARKING



A scatter plot showing the relationship between 'Indoor Games' (x-axis) and 'Hospital' (y-axis). The x-axis ranges from 0 to 1400, and the y-axis ranges from 0 to 1000. Data points are represented by orange circles. The color of the circles indicates two additional variables: 'Sports Facility' (ranging from 576 to 1,332) and 'Car Parking' (ranging from 0 to 1,332). The points show a positive correlation between Indoor Games and Hospital, with a slight upward curve. The color gradient for both 'Sports Facility' and 'Car Parking' is from light blue (low value) to dark blue (high value).

Location	Blue Bubble Value (K)	Green Bubble Value (K)
Ambattur	0	~180
Iyappantha...	0	~200
Karapakkam	0	~250
Medavakka..	0	~220
Mogappair	0	~170
Navallur	0	~210
Perumbakk..	0	~110
Selaiyur	0	~110
Sholinganal..	0	~400
Vadapalani	0	~130

HOSPITALS AND CLUBES IN CHENNAI

AMBATTUR IS MORE
CLUBE IN CHENNAI

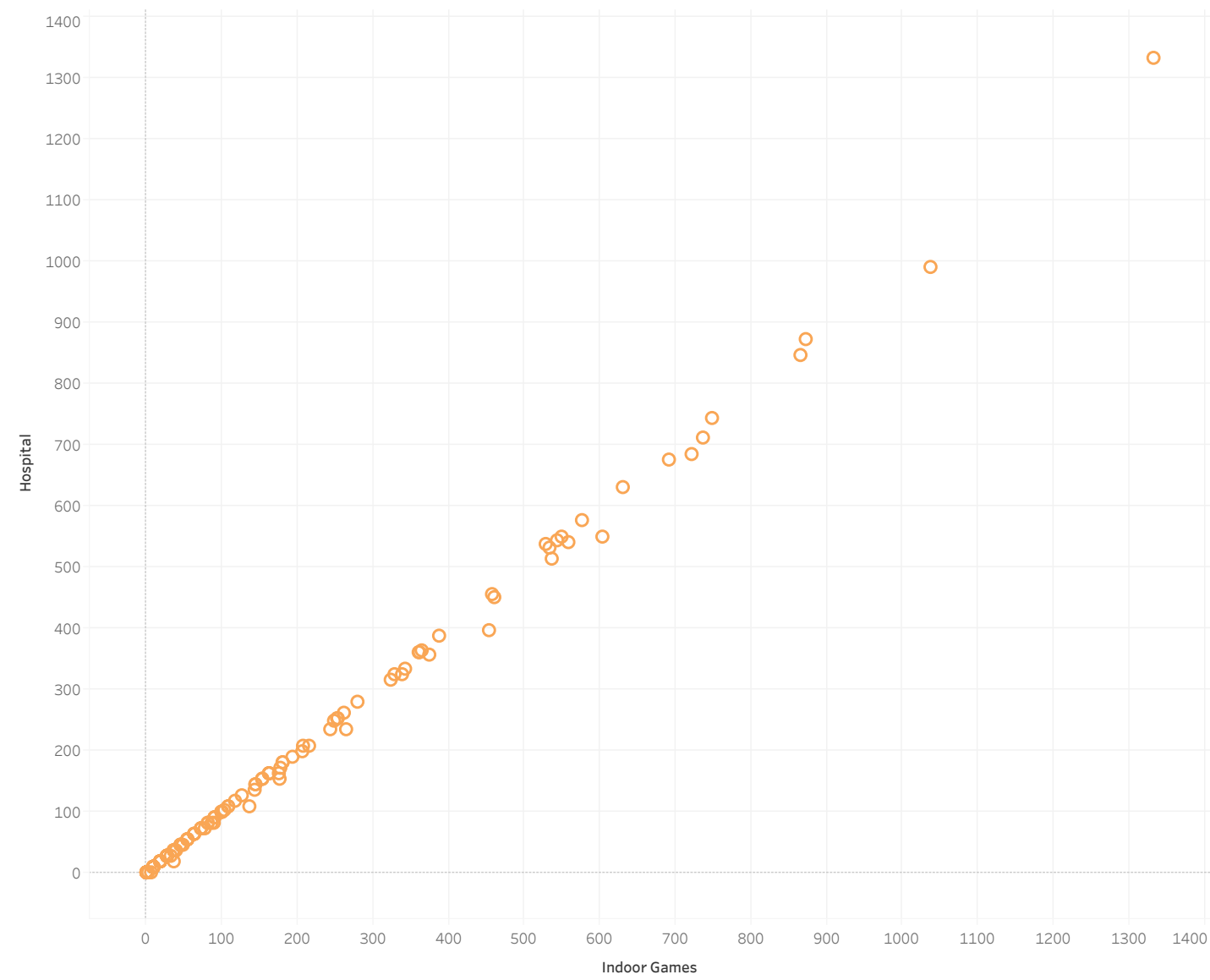
AMBATTUR IS MORE
THEN HOSPLTALS IN
CHENNAI



HOSPITALS AND CLUBES IN CHENNAI

AMBATTUR IS MORE
CLUBE IN CHENNAI

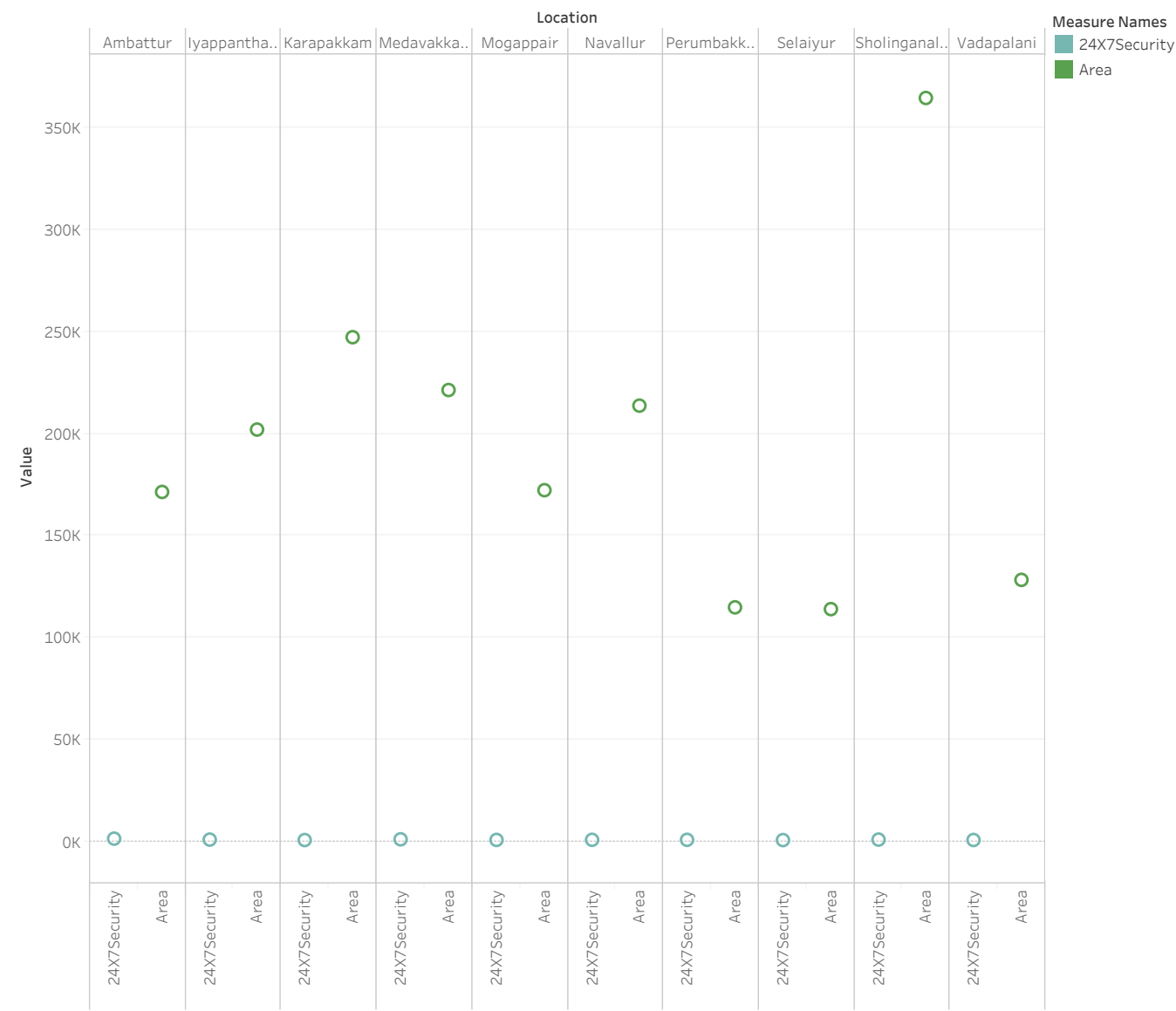
AMBATTUR IS MORE
THEN HOSPLTALS IN
CHENNAI



HIGHES AREAS AND CAR PARKING

SHOLINGANALLUR IS
HIGH AREA IN
CHENNAI

AMBATTUR IS FIRST
CAR PARKING IN
CHENNAI



HIGHES AREAS AND CAR PARKING

SHOLINGANALLUR IS
HIGH AREA IN
CHENNAI

AMBATTUR IS FIRST
CAR PARKING IN
CHENNAI

