Transcript of Meeting between Sarah E. Song (Sunny Side Up) and Moises (ANALITICA)

Meeting attended by: Moises Cohen, Anshu Jha, Ashu Prakash, Priyanka Jha, Sarah Song, Regget Smith

Date: 23rd May 2024

Moises: Good morning, Sarah. It's a pleasure to meet you. I'm Moises, the cofounder of ANALITICA. We specialize in guiding organizations through the analytics journey with a strong focus on the Final Mile of the decision-making process. Our motto is "Decision-Driven Data." How can we assist Sunny Side Up in achieving your goals?

Sarah: Good morning, Moises. Thank you for meeting with me. At Sunny Side Up, we're looking to gain a deeper understanding of our sales dynamics and our loyalty customers' behavior. Specifically, we need detailed analysis across various dimensions such as item categories, sales channels, geographies, and loyalty tiers.

Moises: That sounds like a comprehensive analysis. To ensure I fully understand your needs, could you provide a bit more detail on what you're hoping to achieve with this data?

Sarah: Absolutely. For item categories, we want to know which items are performing best and which aren't meeting expectations. For sales channels, we need to compare in-store sales, online orders, and any other channels we're using. Geographically, we're interested in both state-level and regional performance. Finally, for loyalty tiers, we want to understand the purchasing behavior and patterns of our different loyalty customer segments.

Moises: Understood. To start with item categories, we'll look at sales volume and revenue for each category, identifying top performers and underperformers. This will help us understand customer preferences and potential areas for menu adjustments or promotions.

Sarah: That sounds great. What about the sales channels?

Moises: For sales channels, we'll analyze sales data from each channel separately and then conduct a comparative analysis. This will highlight the strengths and weaknesses of each channel, helping you optimize your strategies for in-store promotions, online marketing, and delivery services.

Sarah: That's exactly what we need. How will you handle the geographical analysis?

Moises: Geographically, we'll break down the data by state and region. This will help identify trends and patterns unique to specific areas, allowing you to tailor your marketing and operational strategies to regional preferences and demands.

Sarah: And for the loyalty tiers?

Moises: For loyalty tiers, we'll segment the data to analyze the purchasing behavior of different loyalty groups. Understanding these patterns will enable you to develop targeted loyalty programs and personalized marketing campaigns.

Sarah: That sounds great. How long do you think this analysis will take?

Moises: Typically, a detailed analysis like this could take a few weeks, depending on the volume and complexity of the data. But we at ANALITICA have enthusiastic people, we can deliver it in a day!

Sarah: Damn! Excellent. We're eager to get it. What do you need from us to begin?

Moises: We'll need access to your sales data, broken down by the categories we've discussed. Additionally, any existing loyalty program data, customer demographics, and previous sales reports would be helpful. We'll also set up hourly check-ins to keep you updated on our progress and to ensure we're meeting your expectations.

Sarah: Perfect. I'll arrange for our team to provide the necessary data. Also, Moises, it would be great if we get this whole analysis on a dashboard tool. This would be for me,

our COO Rakesh, and our CMO Regget. We need a user-friendly interface to access our data insights and reports. Can you help us with that?

Moises: Absolutely, Sarah. We can design a customized dashboard tailored to your specific needs. This will allow you, Rakesh, and Regget to easily monitor key metrics, track performance, and make data-driven decisions. We can include features such as interactive charts, automated reports, and alerts for critical KPIs.

Sarah: That's exactly what we need. It's crucial for us to have such a dashboard to stay agile and responsive.

Moises: Understood. We'll incorporate all the necessary elements to ensure the dashboard is intuitive, informative, and aligns with your brand's theme. Once we have the data, we'll start the design and development process. We'll also involve you, Rakesh, and Regget in the feedback loop to ensure the tool meets all your requirements.

Sarah: Excellent. Thank you, Moises. I'll coordinate with our team to get everything started. Looking forward to working with you on this.

Regget: Perfect! Moises, can we also have a view in that dashboard to track our store managers, RODs, and DOs? That will help our finance team to reward these people based on their performance.

Moises: That's great Regget! We can talk about this in our next meeting. When are you available next?

Regget: Ahh! How about next Thursday?

Moises: I can do that, Regget. And thank you, guys. We're excited to partner with Sunny Side Up and help you achieve your goals. We'll be in touch soon to kick off the project.

Sarah: Great, talk to you soon!

Moises: Take care, Sarah, Bye Regget. See you!