

Phantom Inc. — The True Company

Background (Synthesized)

Below is the distilled, competition-ready profile of Phantom Inc. based on all the slides you shared.

1. Who Phantom Inc. Is

A mid-sized B2B tech provider

- Sells **data center infrastructure**: servers, storage, networking, cloud.
- Operates across **North America, EMEA, APAC**, but your scope is **North America only**.
- Serves **SMB, Mid-Market, Enterprise**.

10+ years of tracked data

- Campaigns
- Leads
- Opportunities
- Web traffic
- Email interactions
- Digital events
- BU performance
- Competitor intel

This is why the case is so data-heavy — Phantom has a **360° dataset**.

2. The Growth Problem (The “Growth Paradox”)

Phantom has been **spending more** but **growing less**.

The symptoms:

- **Plateaued revenue** → existing accounts not expanding
- **Declining win rates** → competitors gaining ground
- **Diminishing returns on marketing spend** → more spend ≠ more pipeline

This is the core business problem your models must explain.

3. The Mandate for Your Team

You must deliver:

A 12-month data-backed roadmap

- Tactical, operationally realistic
- Focused on **North America**
- Covering **SMB + Enterprise**
- Only **direct sales** (no partners, no channels)

A 5-year strategic plan

- High-level
- Scales the 12-month actions

Primary goals

1. Improve **marketing ROI**
2. Increase **retention + LTV**
3. Improve **win rates** and refine GTM

Judging criteria

- 35% business insight
- 30% analytical rigor
- 20% feasibility
- 10% communication
- 5% creativity

This tells you exactly how to weight your effort.

4. The Data Asset (What You Can Model)

Phantom’s dataset covers:

Marketing

- Campaign performance
- Channel performance
- Attribution
- Touchpoints
- Web traffic
- Email interactions
- Digital events

Sales

- Leads
- Opportunities
- Sales reps
- Competitors
- Product catalog
- BU performance

Customer

- Firmographics
- Contacts
- Segmentation
- TAM
- Purchase history

This is why the case is perfect for **segmentation, attribution, win-rate modeling, LTV, and cross-sell**.

5. The Scale of the Dataset

This is important for your narrative — it shows why modeling is necessary.

- **6,207 customers**
- **241,202 leads**
- **20,702 converted opportunities**
- **947 campaigns**
- **2.97M web sessions**
- **105k email interactions**
- **37k high-value events**
- **75 sales reps**
- **5 competitors**
- **96 BU quarterly reports**
- **30 products**
- **36k contacts**

This is a *realistic enterprise dataset* — not a toy dataset.

6. What the Case Expects You to Produce Stage 1 (3-page report)

- Executive summary
- Problem framing
- Methods + models
- Key findings
- Recommendations
- 12-month roadmap
- KPIs
- Assumptions + data cleaning

Optional appendix (3 pages max)

- Model outputs
- Propensity scores
- CLTV
- Attribution results
- Funnel diagnostics

Stage 2 (Finalists)

- 10–12 slide deck
- Must match the report
- Executive-level storytelling

What This Means for Your Modeling Strategy

Now that we know the company background, the models you choose must directly answer:

1. Why is marketing spend not converting?

→ ICP segmentation, lead quality model, attribution.

2. Why are win rates falling?

→ Win-rate model, competitor analysis, discount elasticity.

3. Why is revenue flat?

→ LTV model, cross-sell propensity, retention analysis.

4. What should Phantom do in the next 12 months?

→ Channel reallocation, sales playbook changes, ICP targeting, product bundling.

5. What is the 5-year strategic arc?

→ Data maturity, GTM evolution, product mix, automation, AI-driven targeting.

Judging Criteria (Official Breakdown)

1. Business Insight & Relevance — 35%

This is the single biggest category.

You must show:

- Clear, executive-level recommendations
- Direct alignment to Phantom's objectives
- Segment-specific and product-specific insights
- A narrative that explains *why* growth stalled and *how* to fix it

Translation: Your story must be sharp, strategic, and grounded in Phantom's reality.

2. Analytical Rigor & Validity — 30%

This is where your models matter.

You must demonstrate:

- Appropriate methods (segmentation, attribution, win-rate modeling, LTV, etc.)
- Defensible assumptions
- Clean, reproducible analysis
- Clear explanation of limitations

Translation: Your models don't need to be fancy — they need to be *correct, explainable, and tied to the business problem.*

3. Impact & Feasibility — 20%

Your recommendations must be:

- Operationally realistic
- Respectful of constraints (channels can't be turned off overnight, limited sales capacity, etc.)
- Sequenced into a 6–12 month roadmap
- Supported by estimated ROI or revenue impact

Translation: No “boil the ocean” ideas. Show what Phantom can actually do in 12 months.

4. Communication & Articulation — 10%

You're judged on:

- Clarity
- Visuals
- Structure
- Executive-ready writing

Translation: Your 3-page report must read like a McKinsey or BCG deliverable.

5. Creativity & Depth — 5%

Optional but powerful.

You can earn points with:

- Novel insights
- Advanced modeling (uplift, journey clustering, channel mix optimization)
- Smart visualizations
- Unique strategic angles

Translation: This is where you differentiate — but only after the basics are rock solid.

How to Win Based on These Criteria

Here's the cheat code:

35% + 30% = 65% of your score comes from:

- A strong narrative
- Correct models
- Clear insights

20% comes from:

- A realistic 12-month roadmap
- ROI estimates
- Feasible execution

10% + 5% comes from:

- Clean writing
- Good visuals
- A touch of innovation

If you nail the first 65%, you're already in finalist territory. If you nail all 100%, you win.