

Marketing & Analytics Case Competition

Driving Growth Through Data: The HPE Challenge

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Phantom Inc.: Established Data-Driven Presence

Company Profile:

- **Sector:** Mid-sized B2B Tech Provider specializing in data center solutions (servers, storage, networking, and cloud infrastructure).
- **Footprint:** 10+ years of operation across **North America, EMEA, and APAC.**
- **Customers:** Full-spectrum reach across **Enterprise, Mid-Market, and SMB** segments.



The Engine: Marketing & Sales Ecosystem

- **Digital Reach:** Multi-channel demand generation and brand awareness (Email, Paid Search, Social, Webinars, Content).
- **Physical Closure:** Direct sales force manage complex acquisitions and close enterprise deals.
- **The Data Asset:** Years of tracked performance across campaigns, business units, and revenue touchpoints—**ready for analysis.**

The Growth Paradox: Traditional Strategies might be Failing

In the last 24 months, **Phantom Inc.** has aggressively increased its investment in digital marketing and and monitored product sales and revenue per customer—i.e., account. However, the data reveals a disconnect:

- **Plateaued Revenue:** Existing account growth has stalled.
- **Declining Win Rates:** Competitive deals are slipping away.
- **Diminishing Returns:** Increased spend is no longer yielding proportional growth.

Delivering a Data-Backed Roadmap for Revenue Acceleration

The Mandate

As the consulting team, you must deliver a 12-month data-driven roadmap with clear short-term actions and a high-level 5-year strategic plan that sequences and scales those actions.

- **Primary Goals:**
 - Improve marketing return on investment (marketing ROI).
 - Increase customer retention and lifetime value (including cross-sell/upsell).
 - Improve win rates in competitive deals and refine go-to-market (GTM) strategy.
- **Analytical Rigor:** Identify the friction points in the sales and marketing funnel.
- **Business Narrative:** A compelling case for how Phantom can grow in a competitive market
 - Recommendations should be explicit about differences by customer segment (small business, mid-market, enterprise) and by product category (servers, storage, networking and cloud services).

Delivering a Data-Backed Roadmap for Revenue Acceleration

- **Scope and Timeline Deadline:**

- **The Sprint:** You have **10 days** to move from raw data to a recommendation.
- **Account Coverage:** Insights must cover both the SMB and Enterprise segments.
- **Scope:** Limited to the North American region and direct sales. All other regions and routes to market are out of scope.
- **Execution Constraints:** Recommendations must be operationally realistic, accounting for organizational, contractual, and channel constraints. Assume real-world constraints—no idealized channels, unlimited capacity, or frictionless execution

The Data Asset: A 360-Degree View of the Business

- 1. Campaign Performance:** campaign_id, start_date, end_date, channel (e.g., email, paid_search, display, paid social, events), campaign_type, impressions, clicks, target_segment, leads generated, CTR (click-through-rate), CVR (Conversion Rate), CPL (Cost-per-lead), CPC (Cost-per-Click), ROMI (Return on Marketing Investment)
- 2. Lead Performance:** Lead ID, created date, company ID, status, campaign_id, BU, contact ID, product ID, estimated budget, timeframe to buy
- 3. Firmographics:** Company ID, segmentation, IB/Prospect, industry, region, country, total_employees, revenue_band, partner_info, currently_active_contract, TAM
- 4. Contacts:** Contact ID, company ID, job title, seniority, persona
- 5. Marketing Pipeline:** Lead ID, Campaign ID, Created Date, Channel, Score, Industry, Company ID, Contact ID, Sales rep, Status, Type, Marketing Touches, Web pages viewed, Email opens, email clicks, demo requests, BANT

The Data Asset: A 360-Degree View of the Business (cont.)

- 6. Sales Pipeline:** Sales ID, Lead ID, created_date, close_date, status, stage, channel_route, contact ID, company ID, partner, reseller, BU, product ID, estimated value
- 7. Email Interactions:** ContactID, CampaignID, Type, Date, Details
- 8. Digital Events:** EventID, Company ID, Event Type, Campaign ID, Details
- 9. Web Traffic:** Company ID, Month, Channel, Visits, Average session duration, page per visit, chat sessions, form submissions
- 10. Product Catalog:** Product ID, Product Type, BU, Category, Launch Date, Discontinued Date, Unit Price, Margin, Description
- 11. BU Performance:** Quarter, Business Unit, Cost of goods sold, gross margin, operating expense, operating income
- 12. Competitor:** Name, Primary strength, pricing strategy, cloud reliability, hardware performance, customer support, pricing flexibility, innovation pace
- 13. Sales Roster:** Rep ID, Name, Region, Tenure, Quote tier

The Scale of Opportunity

Customers: 6,207

Contacts: 36,538

Products: 30

Sales Rep: 75

Marketing Campaigns: 947

Leads: 241,202

Converted opportunities: 20,702 (8.6%)

Activities

- # Web traffic: 2,970,616
- # High value events: 37,712
- # Email interactions: 105,154

Competitors: 5

BU Quarterly Reports: 96

Timeframe: Jan 2020 to Dec 2025

Stage 1 Deliverables – All teams – Sunday Feb 22

An Actionable Strategy & Reproducible Analysis

- **Report (3 pages): Key findings and top 3 strategic recommendations.** (Format provided)
 - Methods, model descriptions, assumptions, limitations, reproducible analysis
 - Implementation Roadmap & KPIs: 6–12 month action plan, required resources, expected impact (revenue, ROI), and measurement plan.
 - Declare assumptions and any data cleaning steps.
 - It must contain the following sections: executive summary, a brief problem description, analysis and methodology used, key findings and supporting evidence, other competitive approaches, recommendations and implementation roadmap, and conclusion.
 - Do not exceed the 3-page limit. All sections from beginning to conclusion should be present within the first 3 pages. You will be judged primarily on the information present in the first 3 pages.

Stage 1 Deliverables – All teams – Sunday Feb 22

An Actionable Strategy & Reproducible Analysis

- **Optional (Appendix section – 4th page and beyond):**
 - Use the appendix to show detailed supporting data and reproducible analysis.
 - This section in the report is optional and should only be used to support the argument in the previous sections (1st 3 pages).
 - It may be used to show scores for propensity to buy, CLTV, channel-attribution model outputs, etc., to justify model design and specification (if used)
 - Limit the appendix to 3 pages

Stage 2 Deliverables – Finalists Only – Friday, Feb. 27

An Actionable Strategy & Reproducible Analysis

- Finalist Slide deck (10–12 slides): Data-driven insights, visuals, and recommendations.
 - Highlight key details in your report – What are the main points to show your recommendation, reasoning, and insights.
 - Assume you are presenting to an executive committee of key decision-makers.
 - It should only contain information present in the report. Do not deviate from the previously submitted report
 - 20 mins of presentation and 5 mins of Q&A

Suggested Areas to Study:

Campaign & Channel Effectiveness

- Which campaigns and channels delivered the highest revenue per dollar spent (ROAS)? How does ROAS vary by product category and customer segment?
- Which channels produced the highest-quality leads (conversion to purchase, average deal size, margin)? Are these channels under- or over-invested relative to performance?

Attribution & Touchpoint Analysis

- Using the provided attribution data and touchpoints, estimate the relative contribution of each campaign/channel to closed revenue (compare first-touch, last-touch, and multi-touch results). Propose a recommended attribution approach.
- Identify common touchpoint sequences that precede high-value deals.

Customer Targeting & Analysis

- Segment accounts by firmographics, purchase history, and technology needs. Which segments offer the highest short-term and long-term revenue opportunities?
- For each segment, what product bundles or offers are most likely to drive cross-sell and upsell?
- Which customer cohorts are most valuable to retain and expand?
- What process or tooling changes would improve conversion rates?
- What are the main risks (market, budget, data quality) to the recommended plan? Provide contingency actions.

(Optional Deep-Dive) - Advanced Innovation: Predictive Modeling and Journey Optimization

- **Uplift modeling / causal impact:** Measure the incremental impact of specific campaigns vs a control (where feasible).
- **Customer journey clustering using sequence mining:** Identify archetypal multi-touch journeys for high-value deals.
- **Customer retention:** Improve customer retention (reduce churn) by analyzing
- **Customer Lifetime value:** Improve customer lifetime value analyzing via CLV models
- **Channel mix optimization** using linear programming to maximize expected margin subject to budget and capacity constraints.
- **Econometric time-series modeling** to detect seasonality and lag effects of campaigns on orders.

Operating Reality:

Navigating Data Quality, Assumptions and Sales Capacity

Data quality caveats: There will be missing values, duplicate leads, and imperfect attribution—explicitly describe known issues.

Confidentiality: Company names and contact details does not correspond to any existing entities; students must not attempt to re-identify.

Judging Criteria

Prioritizing Executive-Level Insight and Analytical Rigor

- **Business insight & relevance (35%):** Clear, executive-level recommendations aligned to Phantom objectives.
- **Analytical rigor & validity (30%):** Appropriate methods, defensible assumptions, replicable analysis.
- **Impact & feasibility (20%):** Estimated ROI, implementation practicality (reasonable plan where business contracts for marketing channels cannot be switched off abruptly), realistic timelines.
- **Communication & articulation (10%):** Clarity, visuals, and narrative.
- **Creativity & depth (5%):** Novel ideas, optional advanced analyses.