ALY 6980 CAPSTONE PROJECT

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Building Tomorrow's Leading Franchises Today.

INTRODUCTION

- This is a great exercise to have an open opportunity to see what we find

- Areas to improve to pave the way for increased future successes

- Allows Big Sky to focus on the most important factors bringing new clients

Ready to grow your business? Focus on these 3 key factors!

Big Sky
FRANCHISE TEAM

KEY QUESTIONS

FOCUS AREAS FOR CLIENT ACQUISITION

Our analysis will highlight key areas to focus on for landing more clients

INQUIRY-TO-CALLBACK TIME

What is the average, minimum, and maximum number of days from inquiry to callback?

STATE/REGION IMPACT

Do certain states or regions influence the number of inquiries and probabilities in the dataset?

DATA PREPARATION

■ **Data Cleanup**

■ **Dashboarding**

■ **Analysis**

DATA CLEANUP PROCESS

- Duplicate Columns: Identify and distinguish 14% duplicate columns.
- Removed 33% of columns (id, pipeline) due to redundancy or repetitive patterns.
- Handle Missing values improving completeness by 28%.

Importing Data

Merging Datasets

Rebuilding Missing Data

Deduplication

Standardization

DATA ANALYSIS

Identify Trends and Patterns

Focus on key attributes to target potential clients

Caparison with External Datasets

Evaluate similar external datasets for added insights

Examine Variable Relationships

Examine correlations for business insights and addressing concerns

DATA GOVERNANCE

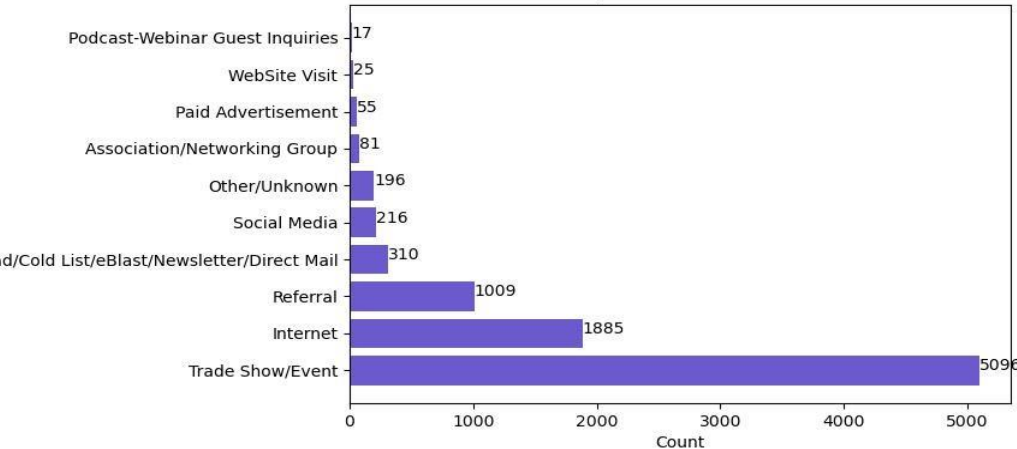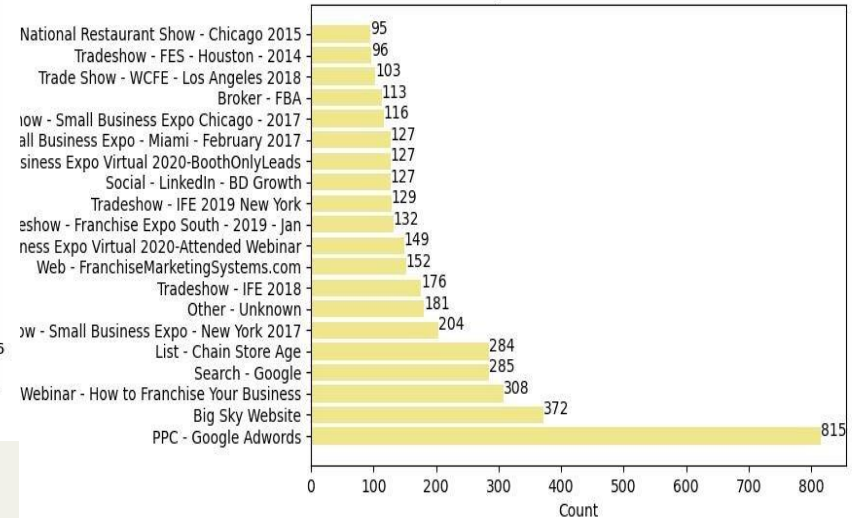| Data Quality	Data Stewardship
Data Protection	Data Management

Sweets 4 Treats

Wanna Cupcake?

Mad Science®

CRU

Royal Restrooms

WRAP CITY
ESTD SANDWICH COMPANY 2015

Lead Sources

Top 10 Lead Sources

Lead Source	Count
Podcast-Webinar Guest Inquiries	17
WebSite Visit	25
Paid Advertisement	55
Association/Networking Group	81
Other/Unknown	196
Social Media	216
...d/Cold List/eBlast/Newsletter/Direct Mail	310
Referral	1009
Internet	1885
Trade Show/Event	5096

Top 20 Lead Sub Sources

| Lead Sub Source	Count
National Restaurant Show - Chicago 2015	95
Tradeshow - FES - Houston - 2014	96
Trade Show - WCFE - Los Angeles 2018	103
Broker - FBA	113
...ow - Small Business Expo Chicago - 2017	116
...all Business Expo - Miami - February 2017	127
...siness Expo Virtual 2020-BoothOnlyLeads	127
Social - LinkedIn - BD Growth	127
Tradeshow - IFE 2019 New York	129
...eshow - Franchise Expo South - 2019 - Jan	132
...ness Expo Virtual 2020-Attended Webinar	149
Web - FranchiseMarketingSystems.com	152
Tradeshow - IFE 2018	176
Other - Unknown	181
...ow - Small Business Expo - New York 2017	204
List - Chain Store Age	284
Search - Google	285
Webinar - How to Franchise Your Business	308
Big Sky Website	372
PPC - Google Adwords	815

New Accounts

- Many will have the same date due to an import date from a previous CRM system.

- Find the actual year for new accounts created date from lead_recived column

New Accounts Created Per Year
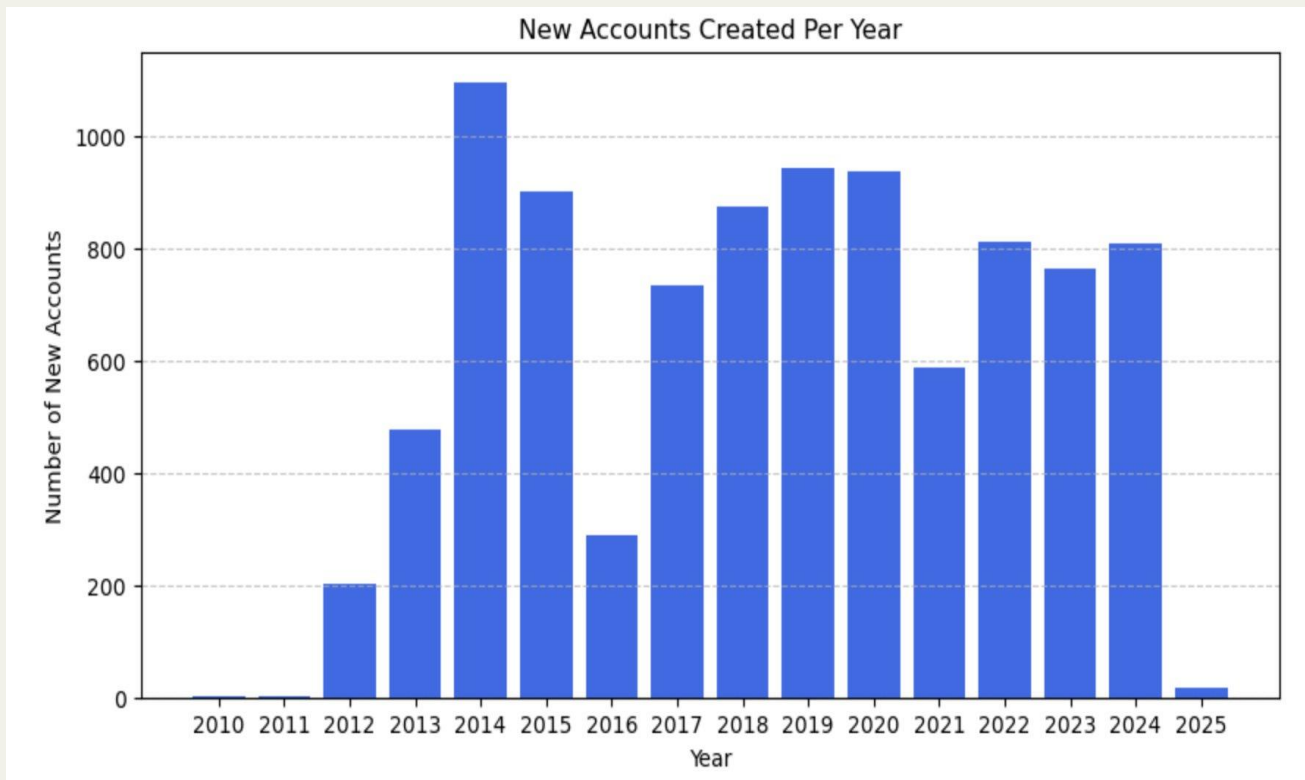
Account Status

- Define Active and Inactive categories

- Find the actual year from lead_recived column

- Group by 'created_year' and 'status_category' and count the occurrences
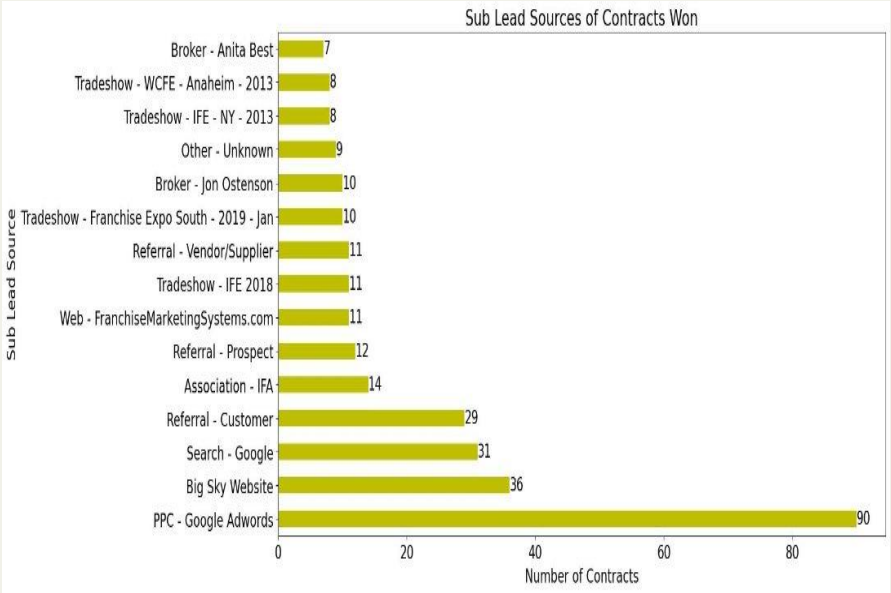
- Answer: How many accounts staying and leaving

Active vs Inactive Accounts Per Year
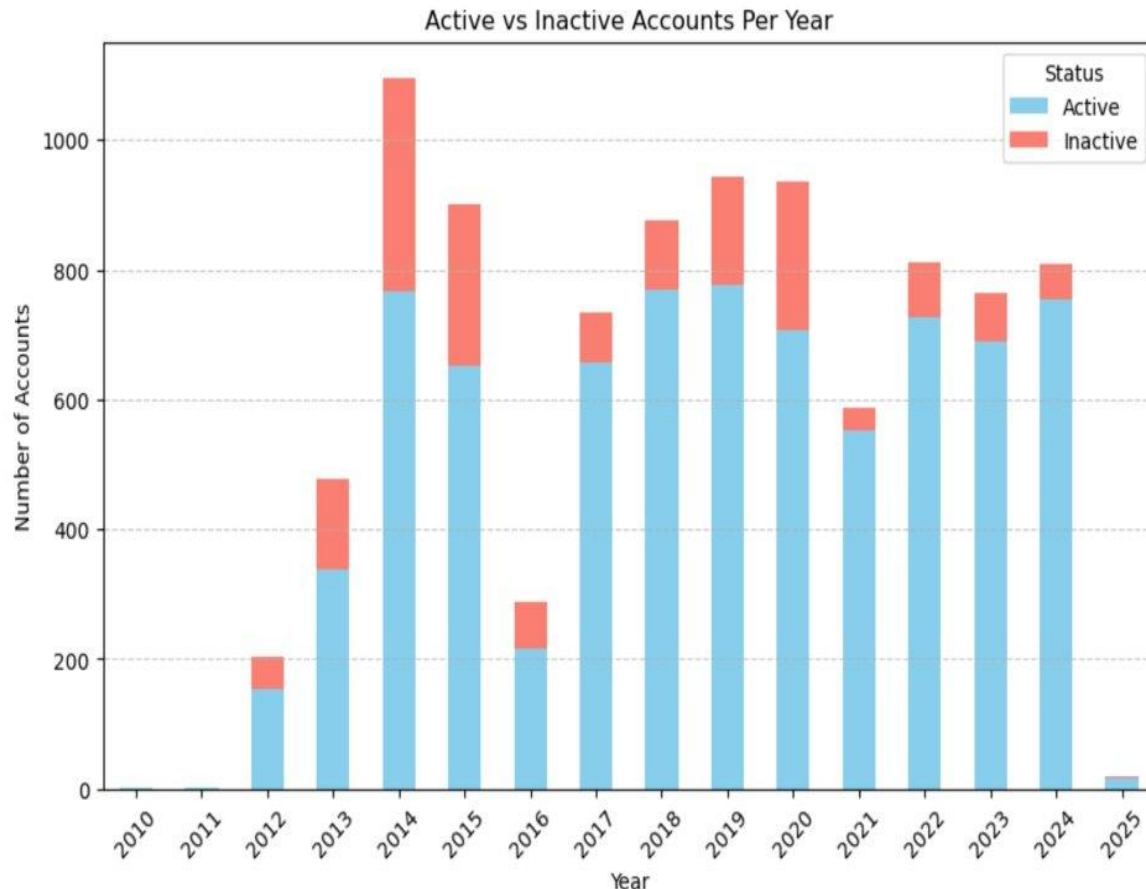
Deals Completed

- Filter for 'closed_won' deals in the 'stage' column
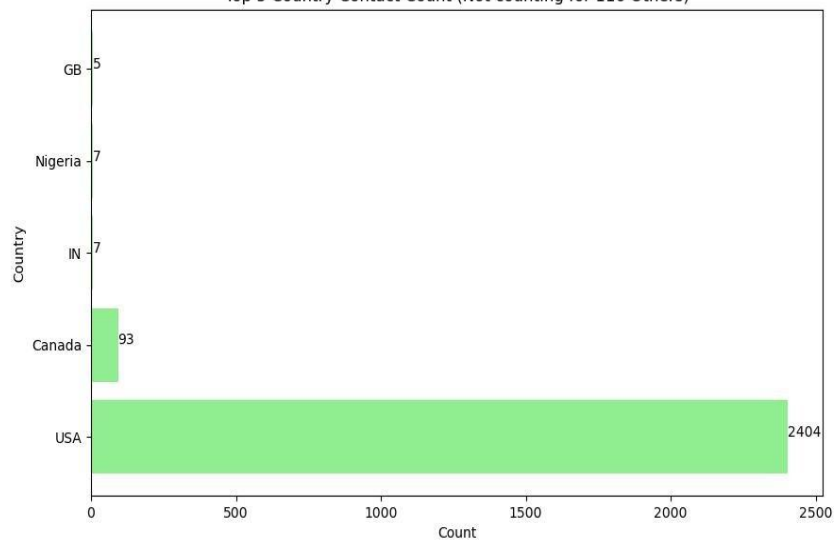
- Find the actual date from lead_recived column

Completed Deals Per Year (Closed Won)

Focus on the Success

But break out the details in the Sub Leads

Lead Sources of Contracts Won

Lead Source	Number of Contracts
Association/Networking Group	2
Big Sky Website	4
Paid Advertisement	5
Other/Unknown	10
Social Media	12
Referral	161
Trade Show/Event	168
Internet	171

Sub Lead Sources of Contracts Won

Sub Lead Source	Number of Contracts
Broker - Anita Best	7
Tradeshow - WCFE - Anaheim - 2013	8
Tradeshow - IFE - NY - 2013	8
Other - Unknown	9
Broker - Jon Ostenson	10
Tradeshow - Franchise Expo South - 2019 - Jan	10
Referral - Vendor/Supplier	11
Tradeshow - IFE 2018	11
Web - FranchiseMarketingSystems.com	11
Referral - Prospect	12
Association - IFA	14
Referral - Customer	29
Search - Google	31
Big Sky Website	36
PPC - Google Adwords	90

Leads and Contacts

Top 5 Country Contact Count (Not counting for 116 Others)

Country	Count
GB	5
Nigeria	7
IN	7
Canada	93
USA	2404

Top 10 State Contact Count

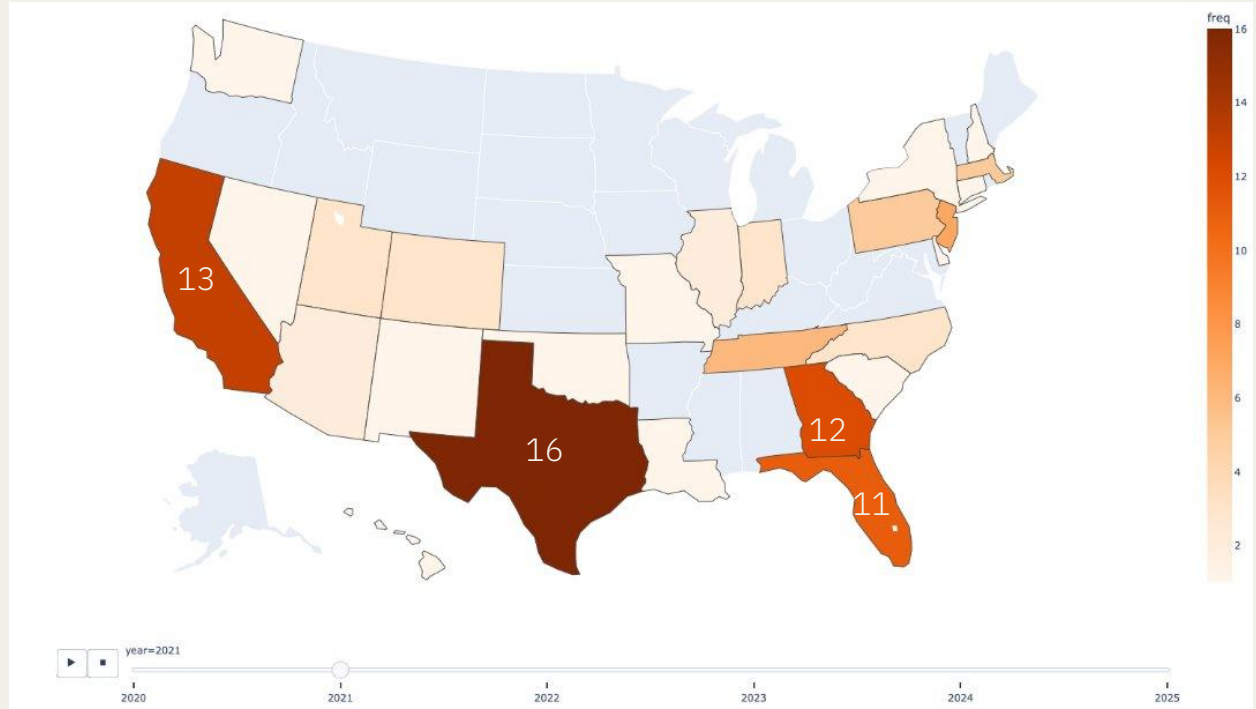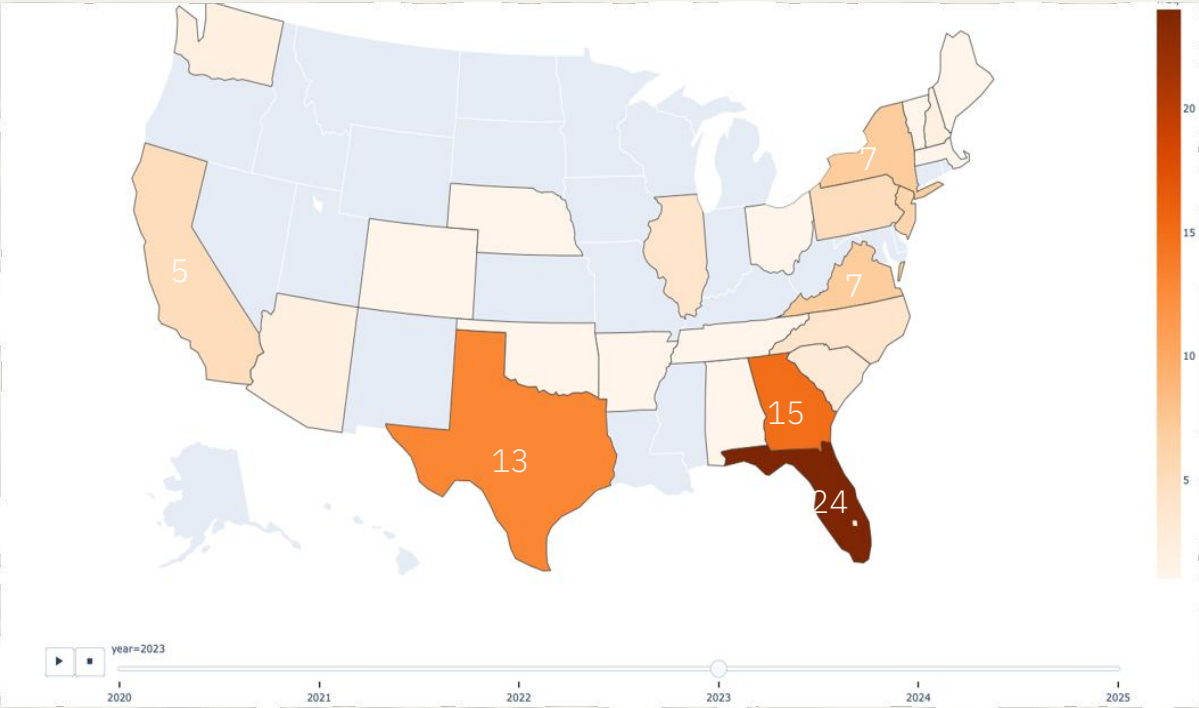| State	Count
Unknown	114
PA	126
NC	131
NJ	237
IL	520
TX	598
NY	637
GA	669
CA	843
FL	913
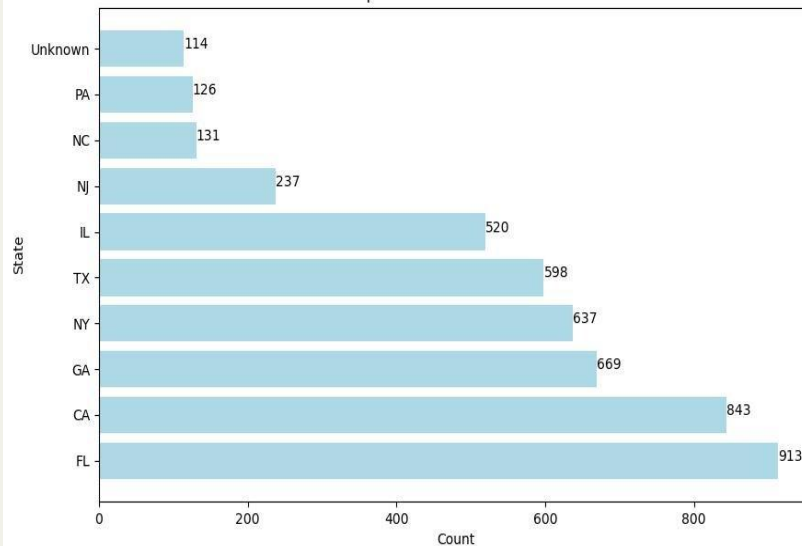
Total of Accounts in States
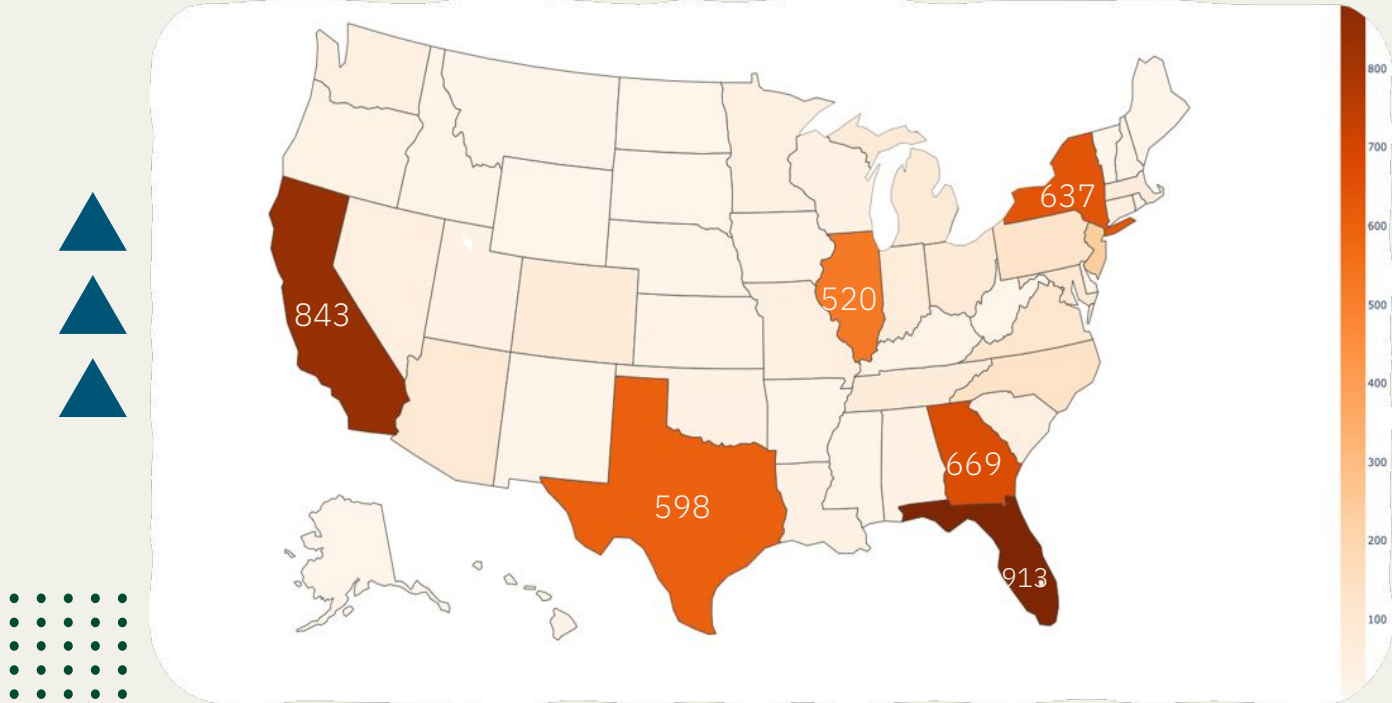
Accounts 2020 and Prior
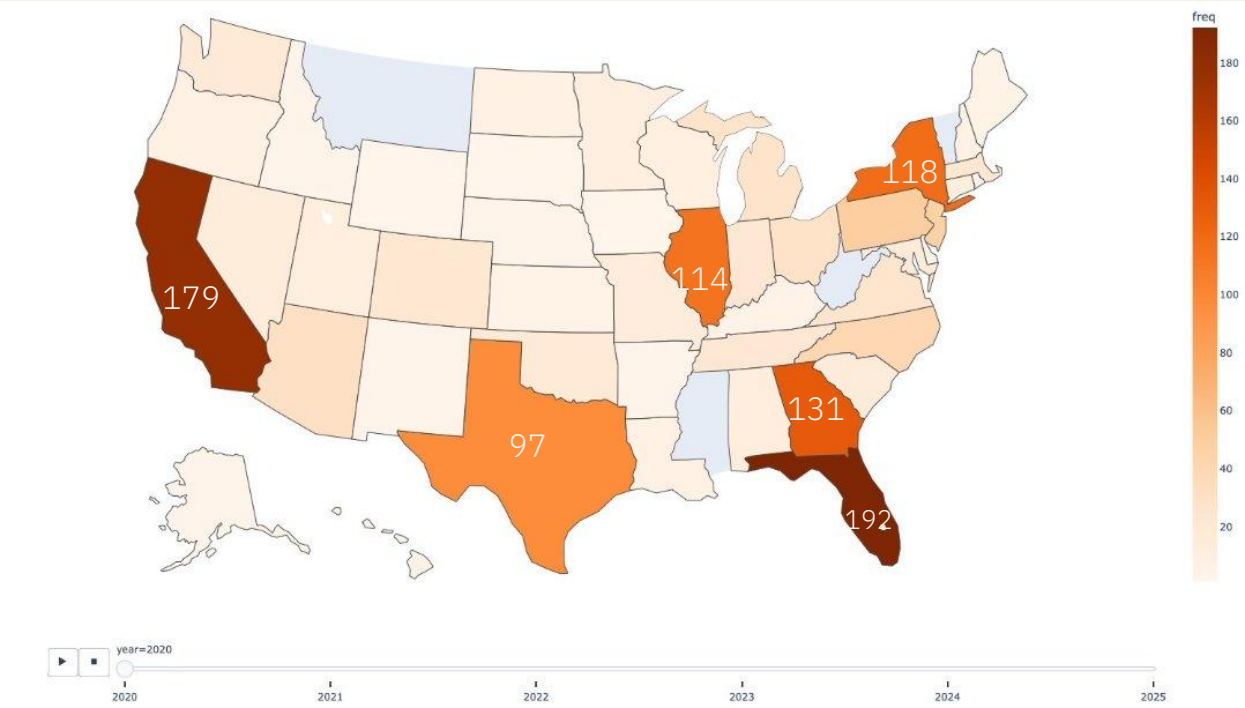
2021 Accounts

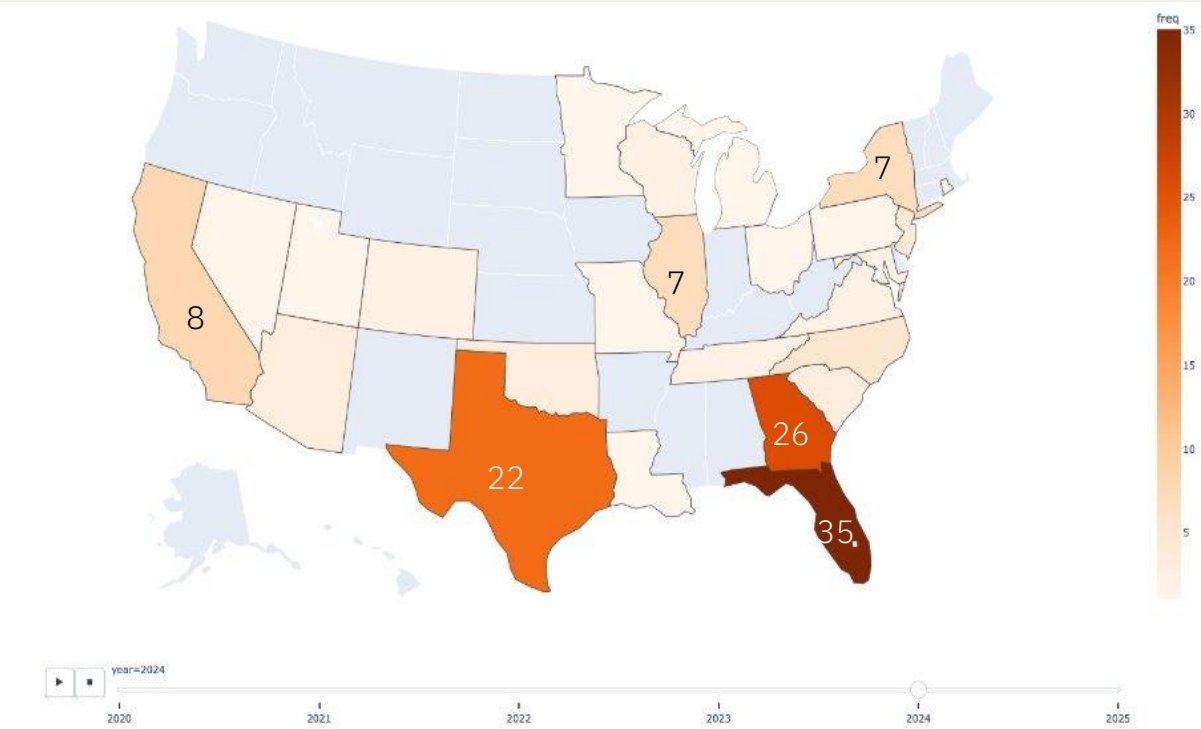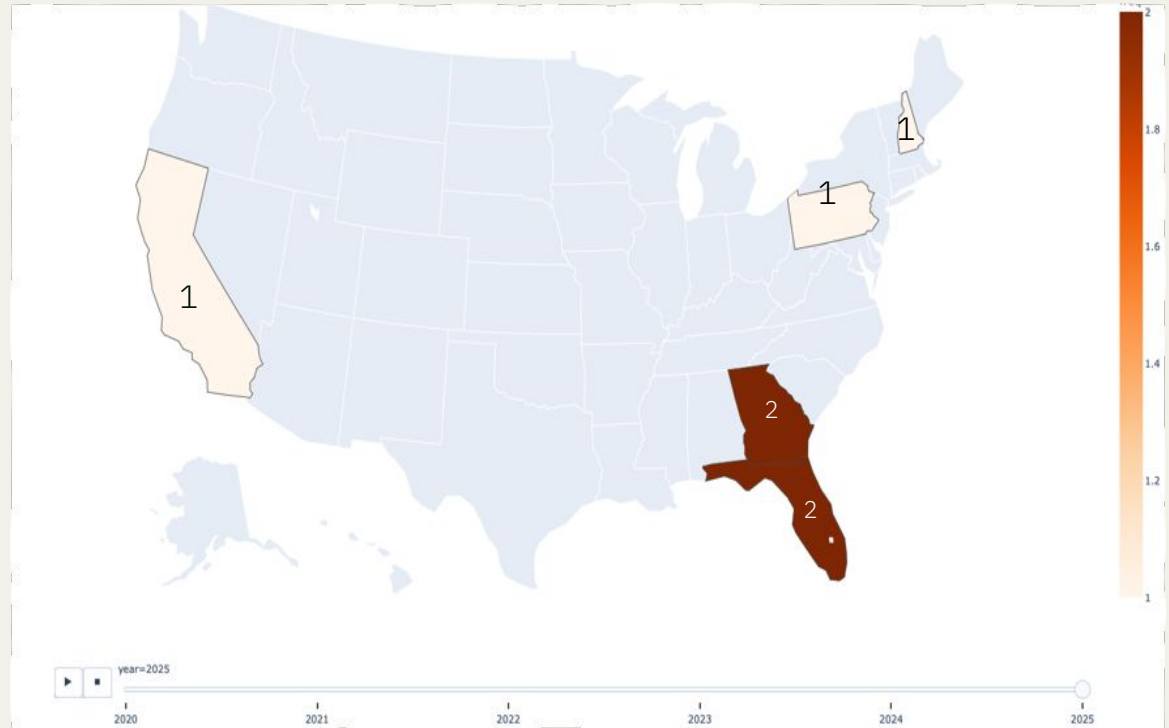# 2022 Accounts
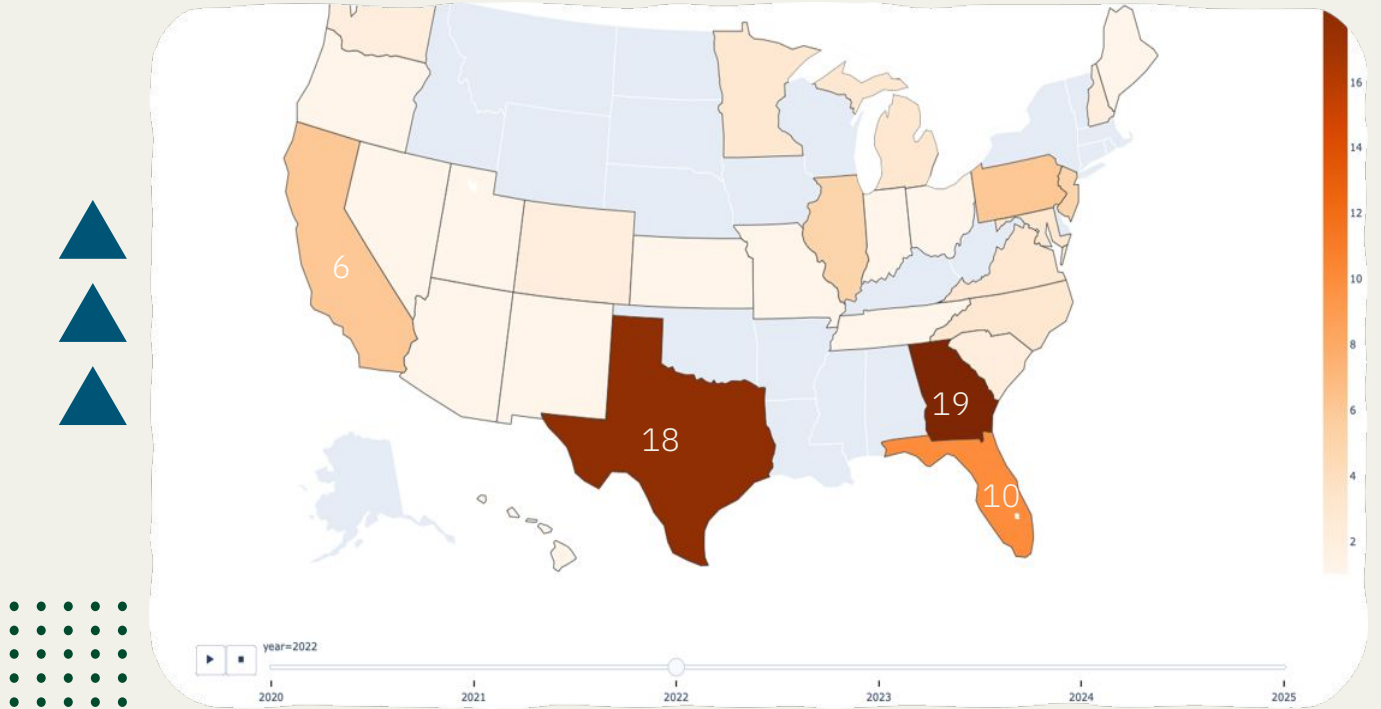
2023 Accounts

2024 Accounts

Off to a Good Start 2025

NEXT STEPS

01 Designing Customer Management Accounts

02 Data Collection methods to gain important metrics

03 Creating interactive dashboards for data insights

04 Presenting a plan and solution for long term growth

CONCLUDING THOUGHTS

| Opportunity to improve internal processes | + | Implementation of Data Governance | + | Forward-focus | = | The rise of new leads |

Thank You!

Big Sky
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EXCELLENCE IS
AT THE CORE OF
EVERYTHING WE DO.