

# A Strategic approach to Customer Retention

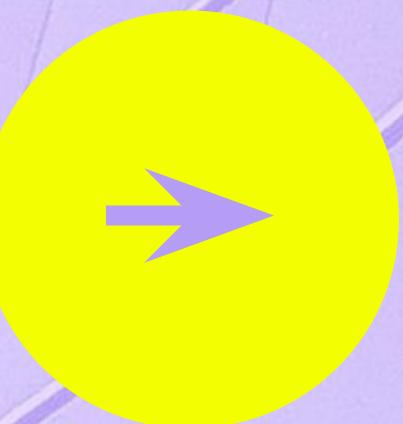
Project: AI X



Agency Logo

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# Agenda

01. Introduction & The Challenge
02. The Strategic Solution
03. The Proposed Deliverable
04. Strategy Implementation
05. Demo feature



# Welcome!

We're Tuc and Dung. Please follow us at  
@BeOneTech

Our Team



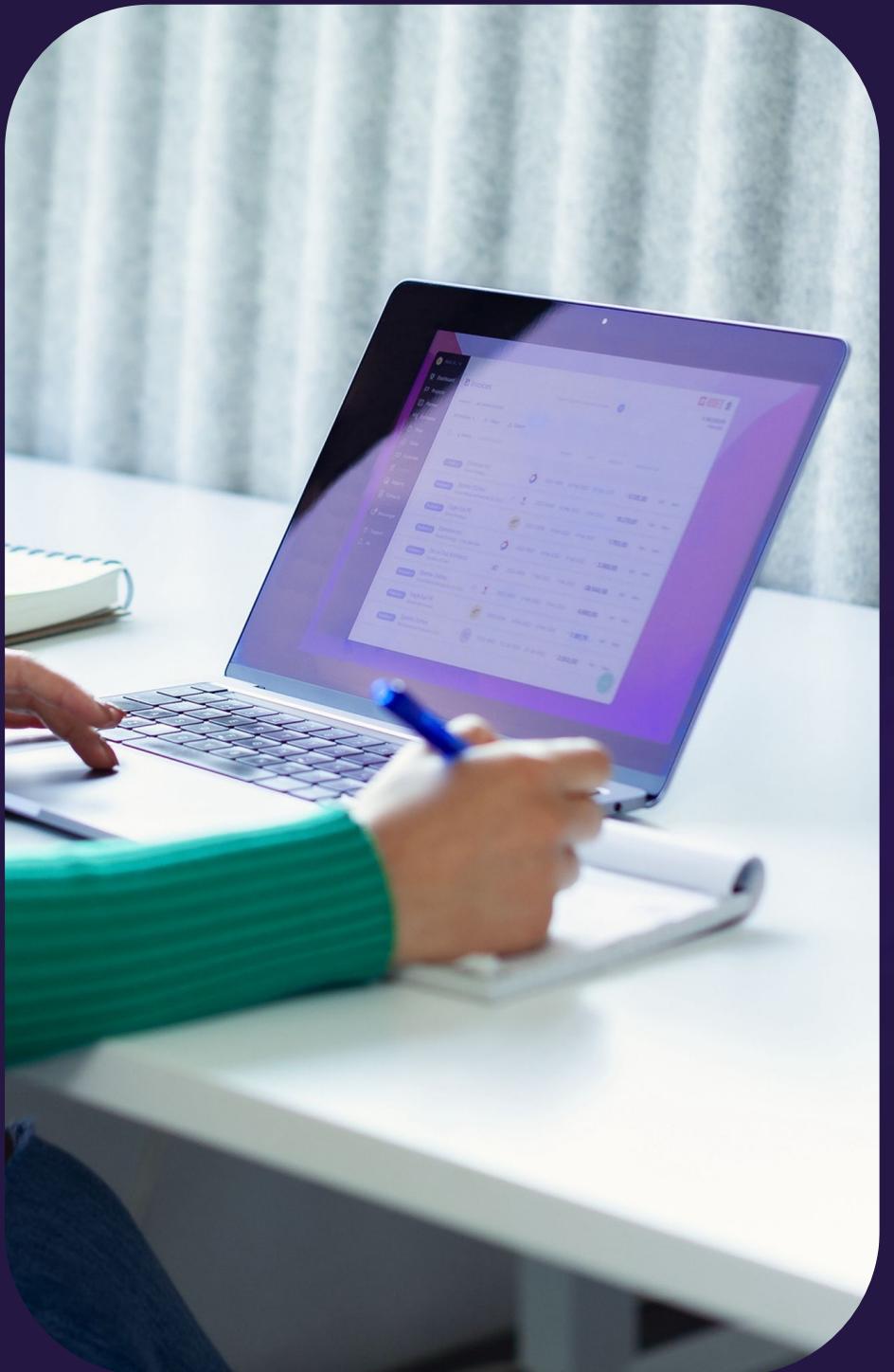
## What we do:

Research and find solutions for businesses problem.





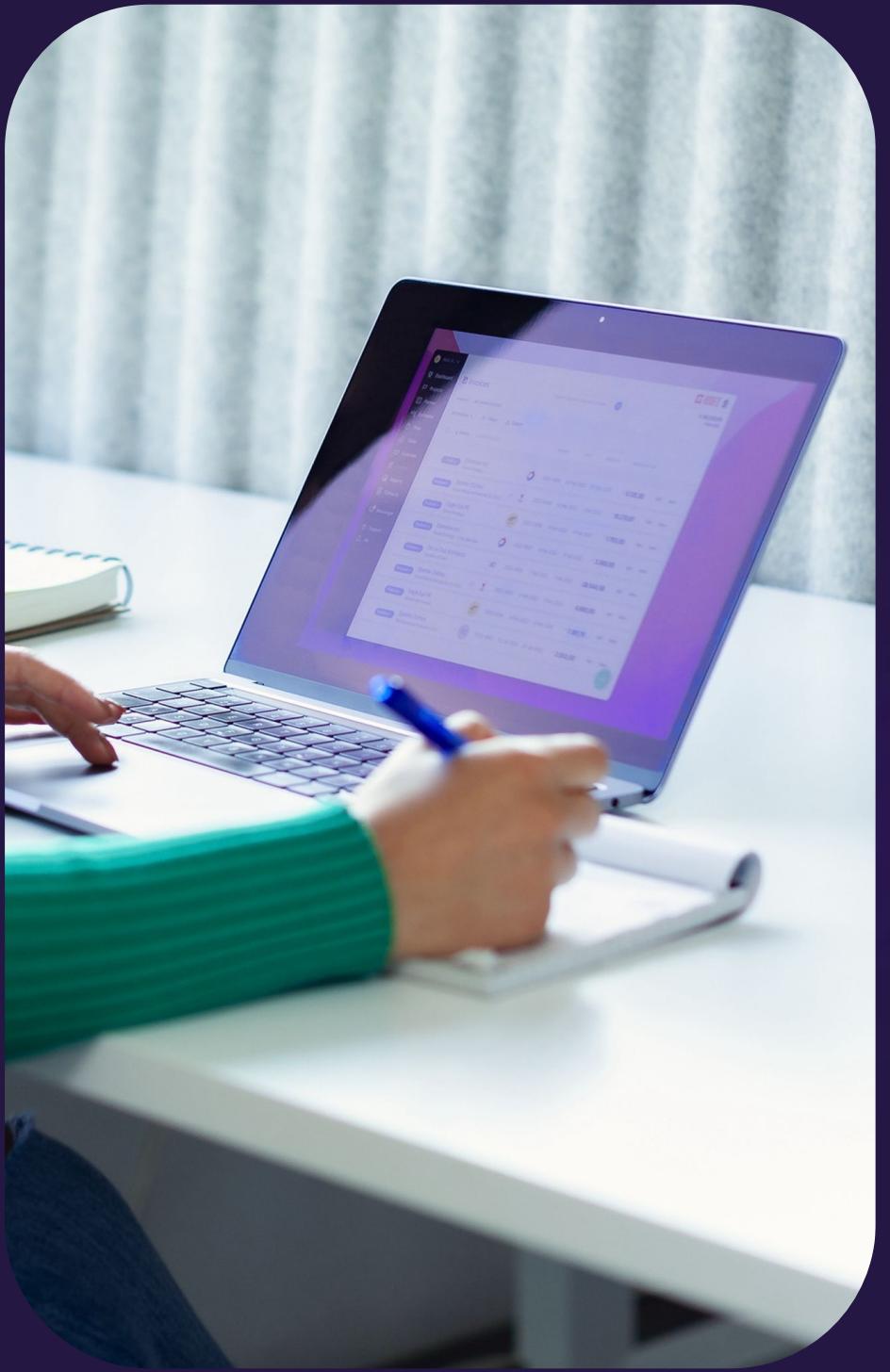
# The Challenge



## The Opportunity

Companies today face a critical challenge: understanding the health of their most valuable asset—**their customer**.

The Problem	The Impact
Fragmented Customer Data	<b>Poor Customer Understanding:</b> We don't truly know who our most valuable customers are or what they need.
Reactive, "One-Size-Fits-All" Marketing	<b>Wasted Marketing Spend &amp; Low ROI:</b> Our marketing efforts are inefficient, failing to resonate with customers and leading to low engagement.
Inability to Identify At-Risk Customers	<b>Rising Customer Churn &amp; Lost Revenue:</b> We are constantly losing customers to competitors, directly impacting our bottom line and growth potential.



## Importance of AI X

Customer churn represents a significant and persistent challenge to our growth. It is a direct loss of revenue and erodes our market position over time. Our current retention strategies are often reactive, acting on lagging indicators when it's already too late. This inefficiency means we are not only losing valuable customers but also failing to maximize the return on our marketing and customer success investments.

To address this, we must shift from a reactive to a predictive model. Project AI X is our strategic initiative to leverage data science and machine learning, allowing us to understand the **leading indicators** of churn. This will empower us to identify at-risk customers early, understand the root causes of their dissatisfaction, and intervene with precise, effective actions before they decide to leave.

# Introduction

# Our Solution: From Reactive to Proactive



# Our idea & vision

## A proactive system that:

- **Detects at-risk customers early:**

Our AI model will analyze daily customer behavior—like purchase recency, frequency, and support interactions—to generate a real-time "churn score" for every customer. We move from asking "Who left?" to answering "Who is likely to leave?".

- **Prioritizes retention effort:**

The system automatically segments customers into "High," "Medium," and "Low" risk tiers. This allows our Marketing and Customer Success teams to focus their most valuable resources on the customers who are most at risk and most valuable to the business.

- **Enables data-led decision-making in Marketing:**

The platform will provide clear, data-backed reasons why a customer is at risk. This empowers our marketing team to move beyond generic campaigns and craft personalized, effective retention strategies for each customer segment.

# Key Goals



## **Goal 1: Reduce Customer Churn Rate:**

Increase the retention rate of the "High-Risk" customer segment by 25% through targeted interventions.

## **Goal 2: Increase Marketing & Retention Efficiency:**

Reduce manual effort in identifying at-risk customers by 95%, freeing up the marketing team for strategic tasks.

## **Goal 3: Foster a Data-Driven Culture:**

All retention campaigns for High/Medium risk segments must be initiated through the platform's recommendations.

# The Proposed Deliverable

## Designed for Our Users:

- For Maria (Marketing Manager): Get a 30-second overview of churn health, a prioritized list of at-risk segments, and AI-powered recommendations for campaigns.
- For David (Customer Success Agent): Receive a daily, prioritized list of high-value customers to contact, complete with the context of why they are at risk.
- For Chloe (C-Level Executive): See top-line metrics at a glance: overall churn rate, revenue at risk, and the direct ROI of our retention programs.

# Core Features: The Predictive Dashboard

- **KPIs:** High-Risk Count, Revenue At-Risk, Predicted Churn Rate.
- **Visualizations:** Risk Distribution, Top Churn Drivers.
- **Filtering:** Slice and dice data by date, channel, and loyalty status.



# Core Features: The Actionable Customer List

- **Risk Segmentation:** Automatically groups customers into "High," "Medium," and "Low" risk tabs.
- **Detailed View:** Provides full context on why a customer is at risk.
- **AI-Powered Recommendations:** Suggests the most effective action for each high-risk customer.

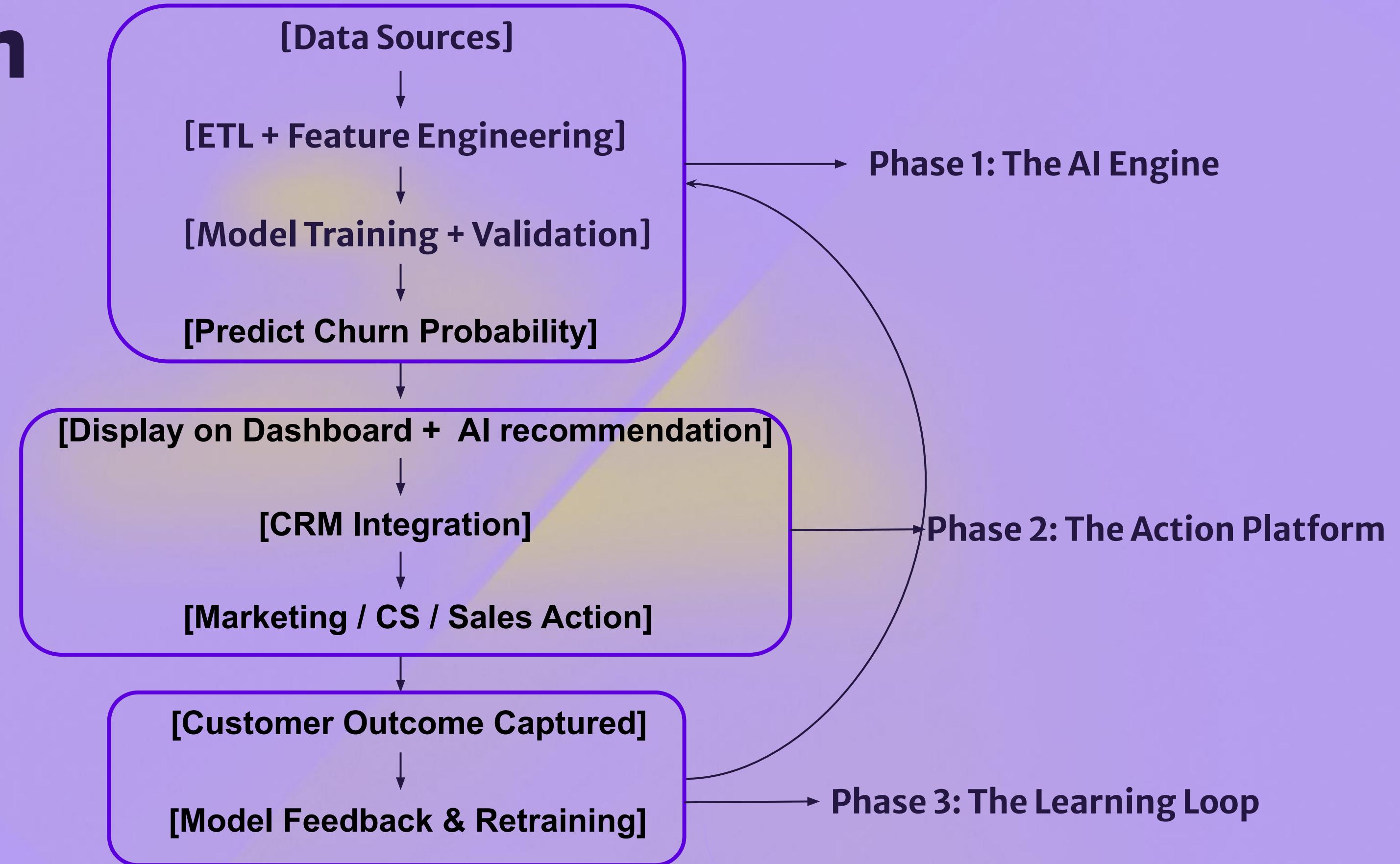


# Core Feature: Seamless Execution & Measurement

- **One-Click Campaign Activation:** With pre-built integrations for Mailchimp and Zalo, you can go from actionable list to execution in seconds.
- **Automated Task Creation:** Automatically trigger tasks for your Customer Success team. A high-value, high-risk customer can instantly generate a "Proactive Call" task in CRM, complete with all the necessary context.
- **Real-Time Performance Tracking:** Track campaign performance, monitor changes in customer risk scores, and see the direction of your retention efforts, proving the value of every action.



# Diagram





# Strategy Implementation

What can you say about your projects? Share it here!



# How We'll Implement ourStrategy



## About Our Content Plan

The plan is structured in three distinct phases: Validation, Automation, and Integration. This phased approach minimizes risk, allows for early feedback from the Marketing team, and ensures the final product is both technically robust and perfectly aligned with business needs.

# MVP Canvas

## 1. MVP Goal:

Validate the core hypothesis:

- Can our predictive model accurately identify high-risk customers?
- Will the marketing team find the list valuable enough to act on?

## 2. Target Users & Personas

Maria – Marketing Manager

- Overwhelmed by generic campaigns
- Needs to prove ROI

David – Customer Success Agent

- Needs to know who to call before it's too late

## 3. User Journeys / Scenarios

Maria's Weekly Review:

- Logs in → sees High-Risk count
- Scans Action List (Top 5–10)
- Notes churn drivers + recommended actions
- Exports to Mailchimp

David's Daily Check-in:

- Filters high-value (>\$1000)
- Sees "High Support Calls"
- Clicks for more context
- Calls proactively

# MVP Canvas

## 4. Inscope (IN the MVP)

- User login
- Read-Only Dashboard View
- KPI Cards (High-Risk Count, Revenue At-Risk)
- Prioritized Action List
- Key Columns: Customer ID, Churn Prob, Top Drivers  
Static Recommendations (if–then rules)
- Manual Data Refresh (CSV or table)

## 5. Outscope (OUT the MVP)

- No Live Gemini API
- No MLOps / Automated Pipeline
- No “Take Action” Buttons / API
- No Medium/Low Risk Segments
- No Advanced Filtering

# MVP Canvas

## 6. Success Metrics & Validation Criteria

Quantitative:

- 🎯 Precision (High-Risk):  $\geq 70\%$
- 🎯 Recall:  $\geq 60\%$
- 🎯 Weekly action usage(WAU)  $\geq 80\%$
- 🎯 Campaign Creation Rate

Qualitative (Survey Feedback):

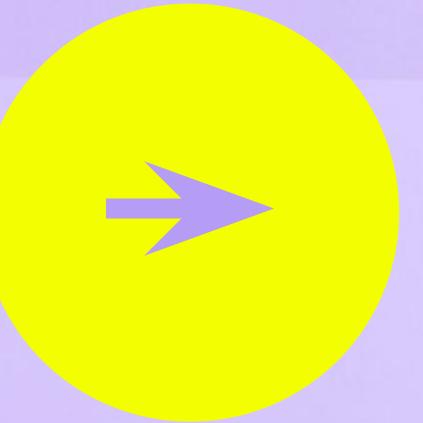
- “Is it clear?”
  - “Do you trust the churn drivers?”
  - “Did it help targeting?”
  - “Does it save time/change workflow?”
- Target:  $\geq 75\%$  respond Agree / Strongly Agree

## 7. Cost & Timeline

Role	Effort
Data Science	2–3 weeks
Frontend / BI	2–3 weeks
Total	5–6 weeks

# **DEMO PRODUCT**

## **FEATURES**



# Thank You!

For any queries, contact us:

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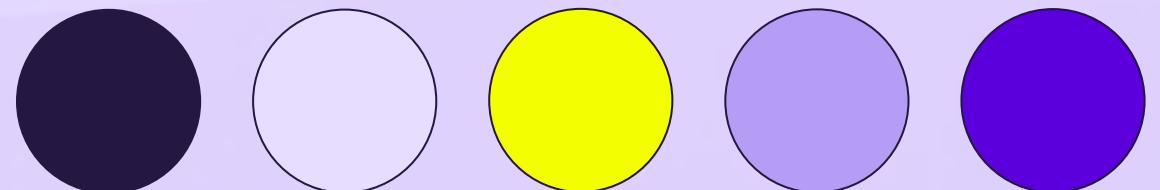
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## Colors



## Design Elements

