MYBASEGUIDE

TEAM 7

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Executive Summary

Goals & Objectives

1. Determine the attributes that will lead to won opportunities for marketing purposes
2. Better understand risk through identifying which contracts have incomplete payment

Approach

Explored the characteristics of companies and contracts for all digital sales opportunities

Identified which companies, after winning an opportunity, did not pay in full

Key Findings

Current advertising efforts are not effective for maximizing won opportunities

Facebook marketing parameters need to be updated to reflect the attributes - such as industry and base - of won, paid in full opportunities

Next Steps

Perform small-scale experiments on Facebook marketing parameters and monitor success rate using won ratio

Data Overview & Assumptions

Removed all print opportunities since they are no longer part of the product offerings

All relevant data used has a corresponding package or was an ad-hoc digital opportunity

Incomplete payment refers to won opportunities where the client cancelled **or** did not pay the full invoiced amount

63.5% overall won opportunities

In 16.5% of won opportunities, the client never completed payment

and cancelled opportunities account for **6.1%** of incomplete payments.

31.9%

of won opportunities were **inbound**

63.6%
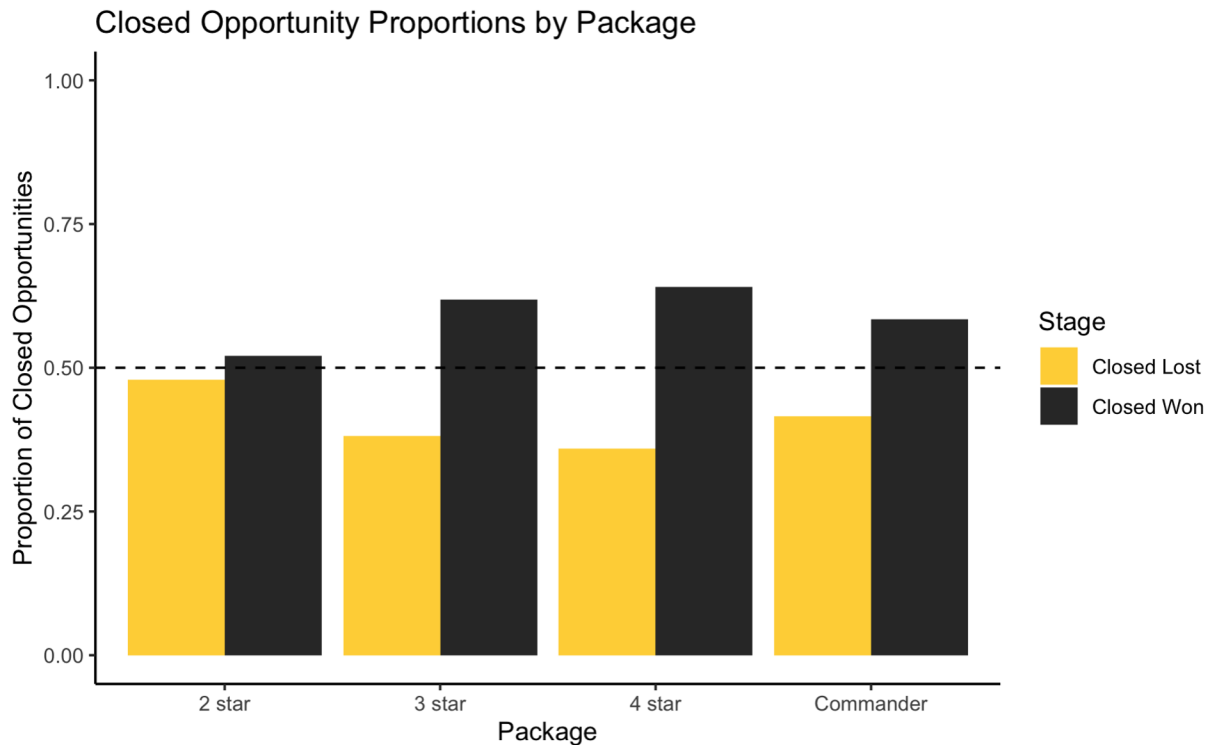
of won opportunities were **outbound**

Current advertising efforts are NOT leading to a majority of won opportunities

Package

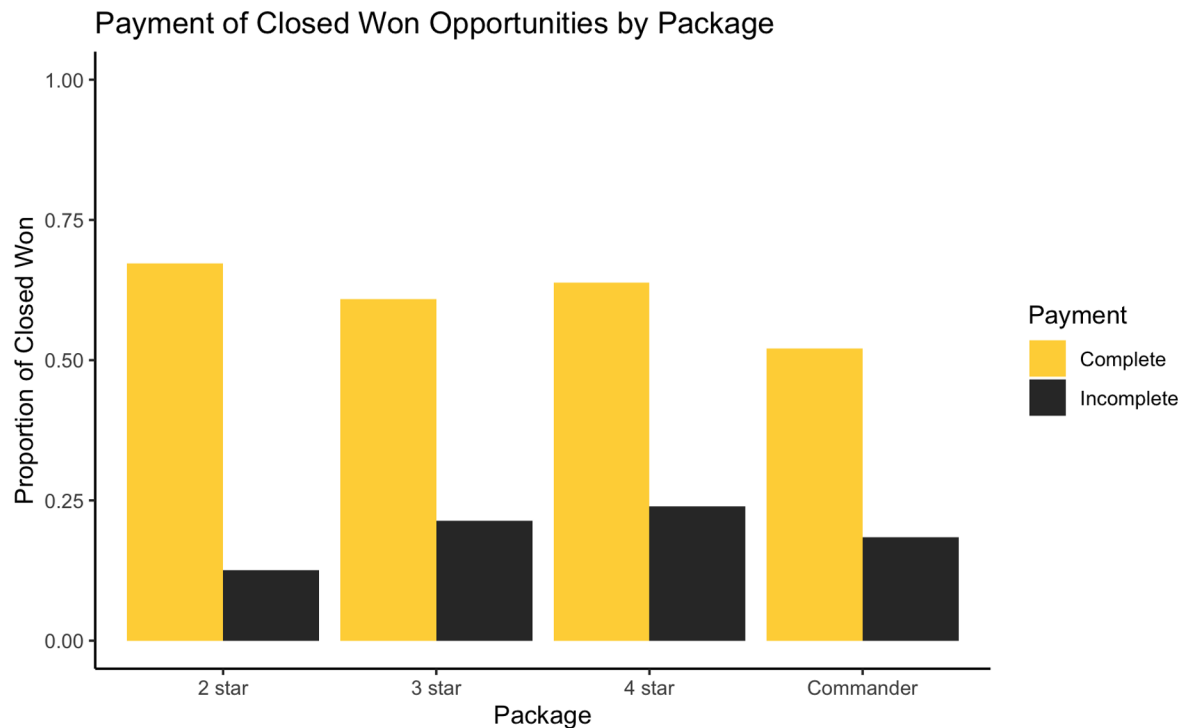Larger packages have high success rates while two star packages only have ~50% win rate

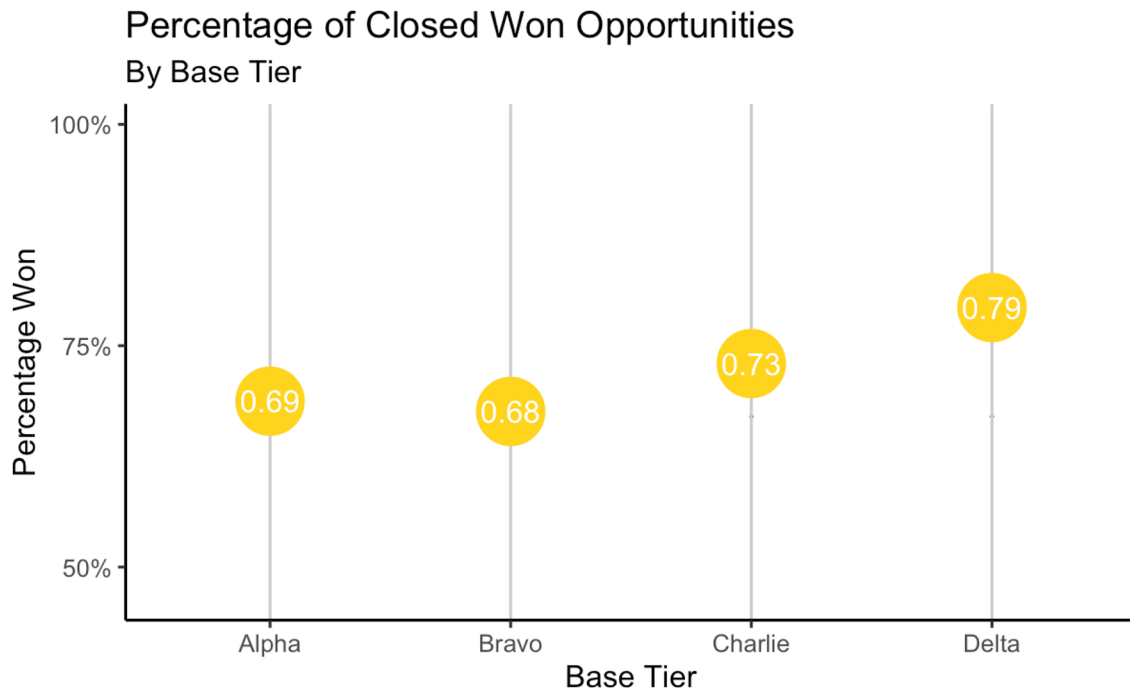Closed Opportunity Proportions by Package

Package

For each package, payment was incomplete in less than 25% of won opportunities

Payment of Closed Won Opportunities by Package

Base Tier

Delta-tier opportunities are won most frequently

Percentage of Closed Won Opportunities
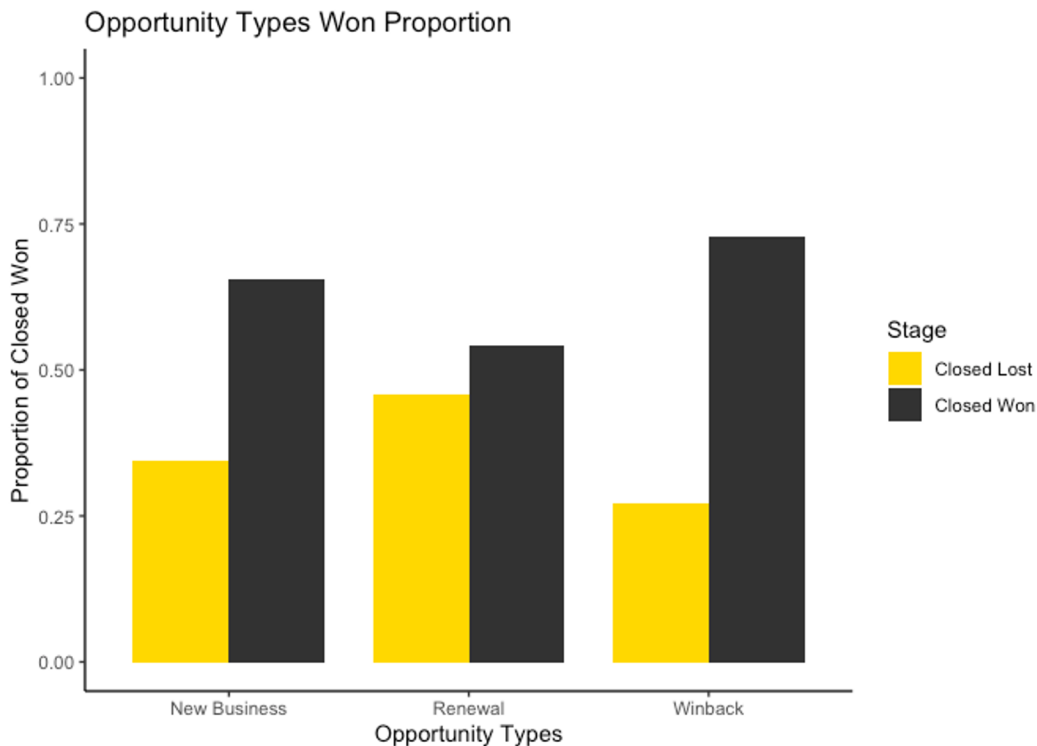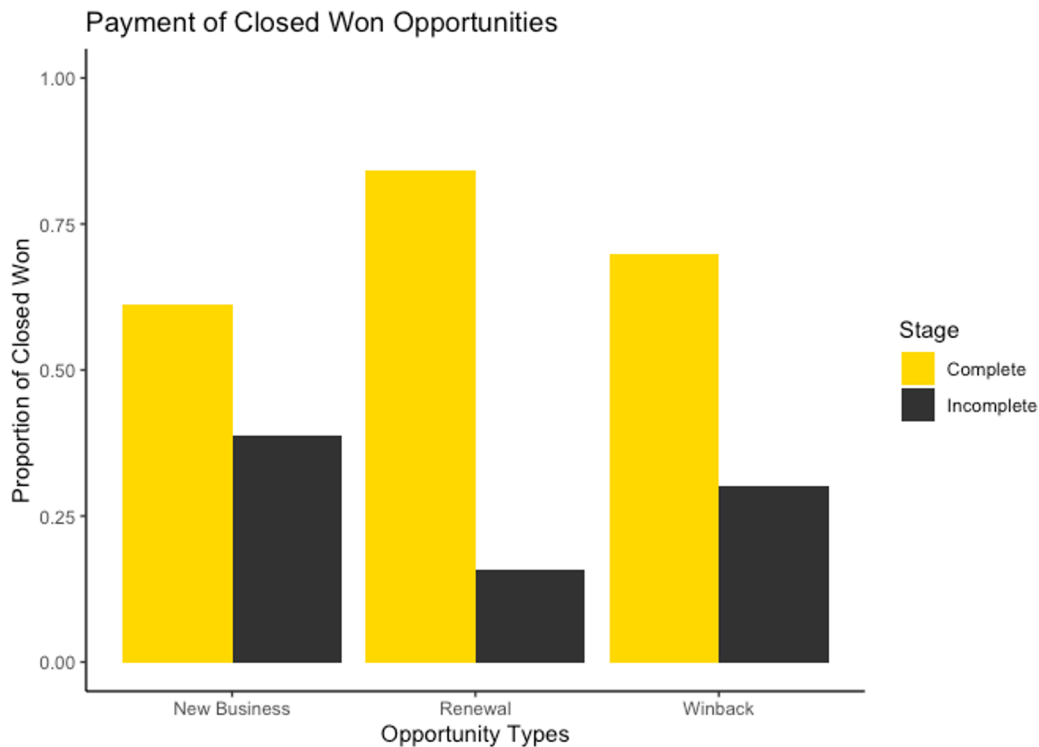### By Base Tier

Opportunity Type

Winback attempts and new business are currently successful while only about half of renewals are won

Opportunity Type

Renewals, once won, are paid in full 86.3% of the time

Payment of Closed Won Opportunities

RECOMMENDATIONS

Highest Revenue Industries
By median amount paid

ENTERPRISE
100% won
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RETAIL
88% won
$1,939

SERVICES
87% won
$1,068

FAMILY
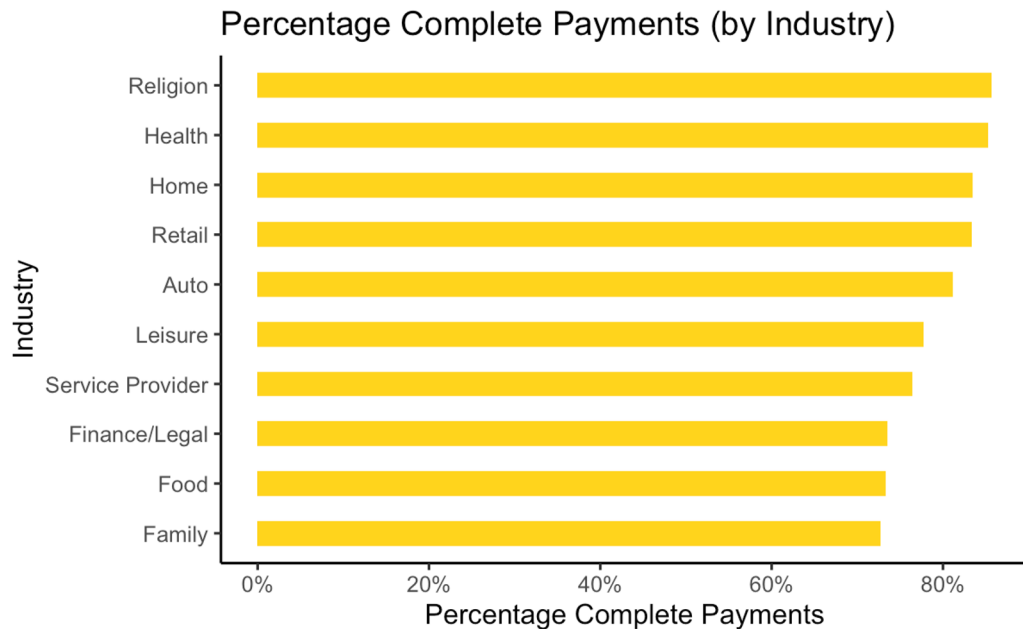70% won
$2,041

HEALTH
69% won
$1,840

Marketing efforts should be most focused on **family, retail, and health** industries

Industry

Health, home, and retail are not only the most profitable industries, they also have the lowest chance of incomplete payment, along with religion

Percentage Complete Payments (by Industry)

Base & Base Tier

Targeted marketing should be aimed at the most profitable bases: **Quantico, Eglin, Pensacola**

Median Paid to MBG (by Base)

Tier
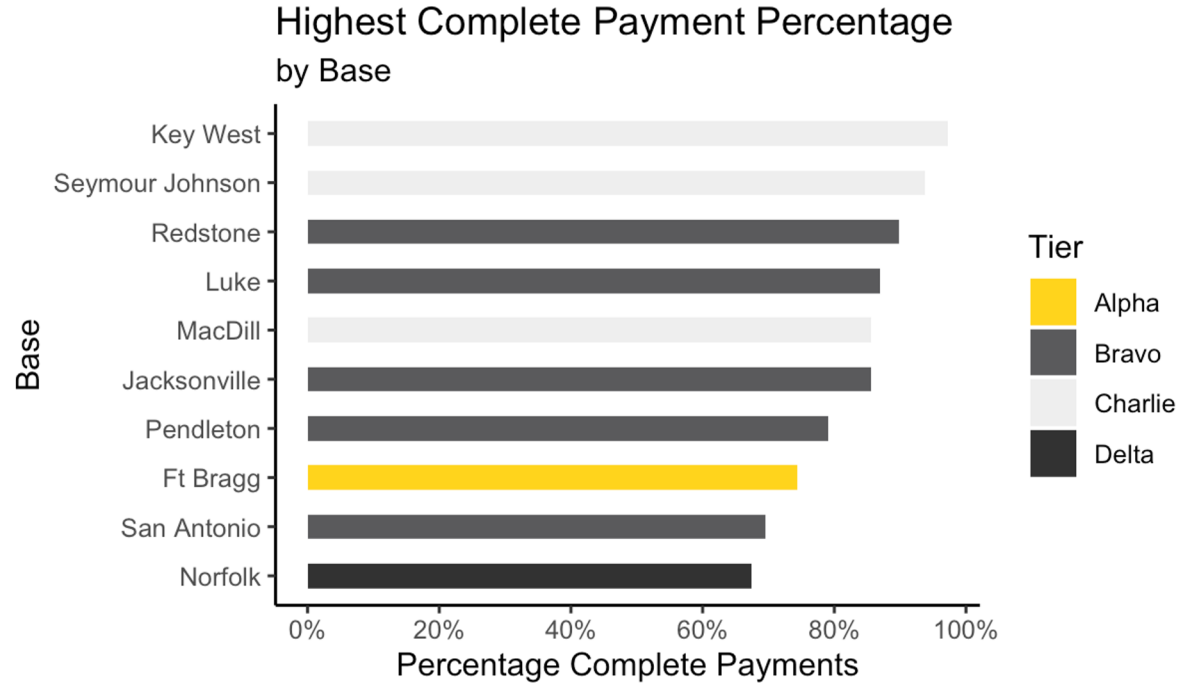- Alpha
- Bravo
- Charlie

* Bases with more than 60 opportunities
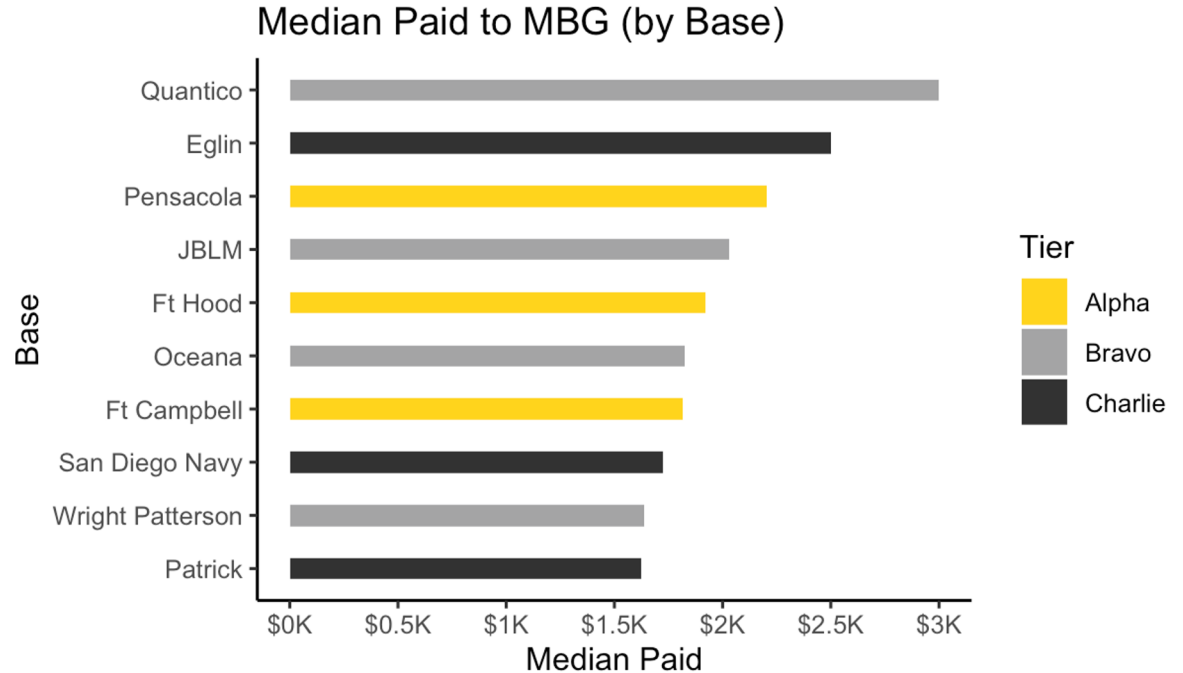
Base & Base Tier

Marketing strategies should also increase targeting to bases that pay in full:

**Key West
Seymour Johnson
Redstone**

Highest Complete Payment Percentage
by Base

* Bases with more than 10 PIF opportunities

Next Steps

For MBG: Investigate the effectiveness of changing marketing parameters:

- ◎ Increase targeting of health, home, and retail
- ◎ Increase Facebook marketing ads to Quantico, Eglin, Pensacola, Key West, Seymour Johnson, and Redstone bases
- ◎ Measure success month-over-month using win ratio

For Team: Identify geographies with the most won opportunities

- ◎ Add insights into the targeted marketing strategy

THANK YOU!

APPENDIX

Appendix A: Incomplete Payment Calculation

Assumptions:
1. When total_paid is NA, assign it a value. Either:
   a. If amount_collected is not NA, assign its value to total_paid
   b. If amount_collected is NA, assign 0 to total_paid

Calculation:
- If total_paid >= total_invoiced, payment is **complete**.
- If the contract is expired and total_paid < total_invoiced, payment is **incomplete**
- If the contract is over 1 year old and total_paid < total_invoiced, payment is **incomplete**
- If contract is cancelled, payment is **incomplete**
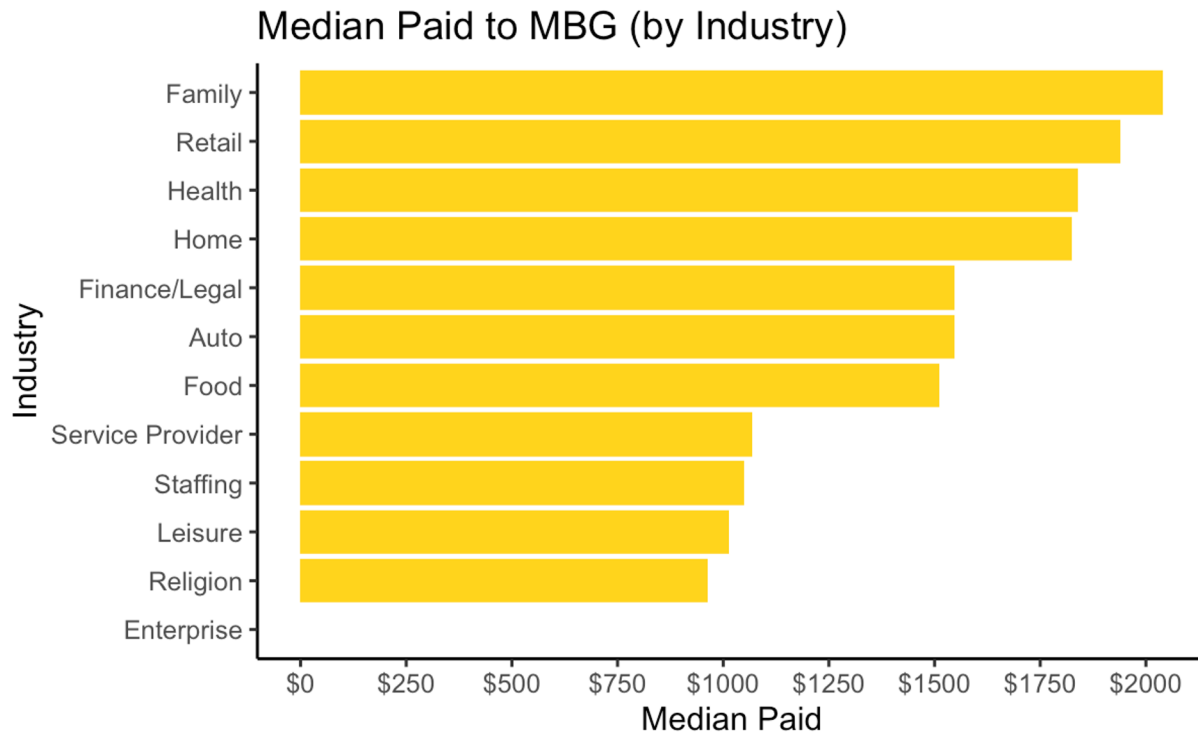- If none of the above conditions are met, payment is **in progress**

Appendix B: Industry Consolidation

The following industries were consolidated based on common relations such as:

- **Family** (Child Care, School, Education, Family, Youth, Pet)
- **Auto** (Auto, Car, Tire)
- **Home** (Home, Estate, Property, Mortgage, Furniture, Utilities, etc.)
- **Health** (Dental, Physician, Medical, Pharmacy, etc.)
- **Retail** (Shopping, Fashion, Boutique, Commerce, etc.)
- **Leisure** (Entertainment, Attractions, Media, Recreation, Fishing, etc.)
- **Finance/ Legal** (Attorney, Bank, Accountant, Insurance)
- **Food** (Dining, Food, Coffee, Restaurant, Grocers, etc,)
- **Religion** (Religion and Church)

Percentage of Closed Won Opportunities (by Industry)
Out of Total Closed
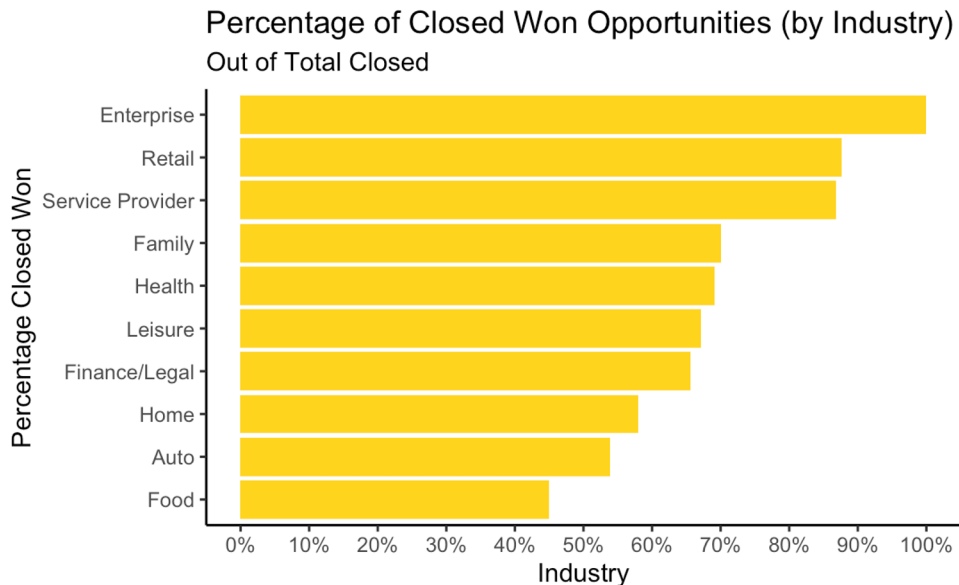
Appendix C: Median Paid by Industry

Median Paid to MBG (by Industry)

Appendix D: Complete Payment by Base

~77% paid-in-full for all base tiers

Complete Payment Percentage (by Base Tier)