## Introduction

* Hi All, in this session I’ll give another update on the lead generation project.
* Just to recap on the last month’s update:
  + I went through the new experiment General export Facility which is similar to tier1 UKEF experiment but we are looking for Barclays client who are UK exporters, we identified around 2,800 these clients
  + Then I talked about automating the process of identifying Barclays clients and prospects who’ve won a public sector contract recently. It is currently a manual process. I’ve tested the model against Octobers contacts and was able to match around 23% of the unique suppliers as Barclays client. I have some more updates on the contracts in this session as well.
  + Then i spoke about the cross functional team proposal for evaluating the opportunities from the experiments which I will talk more in the later slides
* In this sessions:
  + I’ll first give a quick update on the **outcome** of last months CDC meeting
  + Then I’ll give some **updates on the pilot plan** which is still in the **draft phrase**
  + Finally I’ll give an update on the public sector contracts and talk about the data I’m extracting out from Zeus for my experiments.

# CDC:

* David Thompson from Data monitisation has taken this project to Novembers CDC and we got **data usage approval to use the various data** such as payments , customer and zeus for our experiments
* We were also given the go-ahead to start formulising the pilot plan which I will go talk about next.

# Pilot:

* As mentioned we got approval from CDC to start formulating a pilot plan
* Gavin Allen from the data innovation team will be leading on the pilot as he has previous experiences working on campaigns
* We are still **formalising the plan** and is in the draft phase and so I cannot go into much detail but we should have a concrete plan in next months meeting
* The purpose of the pilot is to test the commercial viability of the experiments in this project.
* We had our **first** introduction meeting last week with various stakeholders including paul Dimon and paul woodward
  + There was good discussion on various topics such as how we measure success/value other than whether client taken up on the product.
* We actually have a second meeting planned tomorrow and hopefully we can finalise some scope of the pilot.
* In terms of next steps, we need to finalised the pilot plan and then take it to the data execution forum in January for approval before we can do anything else.
* As mentioned, I’m hoping to be able to present a finalised roadmap for the pilot next month.

# Public Sector Contracts

* **In last months meeting** I tested the matching model against Octobers contracts where we managed to identify around 23% of the unique suppliers
* **I have since then** extracted out contracts from start of this year to end of November and ran the matching model against the suppliers
* As you can see for each month, around **20% match rate** of the unique suppliers
* These matched Barclays clients will **ideal candidates** for Selective receivable finance as the debtor will be in public sector.
* This is different to the **previous** SRF experiment as we were using **past transactional data** to **identify public sector debtor** and in this case we are being proactive, anticipating payment from a public sector debtor
* For next steps, So far I’ve only been extracting contracts from the UK, however from the **Official Journal of EU**, we have access to contracts from EU as well. I want to see if I can extract out these EU contracts where the awarded supplier based in UK and match it to Barclays client.

# Zeus Database

* Previously I mentioned getting access to the zeus database in order to get additional client’s data which will further help refine the opportunities
* I’ve since had a look at the Zeus database in BIW and I have extracted various data such as the clients default grading, and various information from the financial statement such as assets, liabilities.
* This data from zeus will allow us to **better target client** for example, for SRF the DG must **have a certain DG rating to qualify** and if we know the client has a **lot of cash on hand** then they are less likely to take up on SRF
* I’ve did notice some issues from looking at the database - there was a quite a few clients with no financial statement and there were some where the **last updated date was a few years old.**
* I was wondering if anyone knows if records on zeus is updated automatically or does it work on an adhoc basis.
* I also plan on showing this zeus data on the poc dashboard I’m building for mark Henderson in TWC so he can easily switch between the clients transactions and their financial siituation– does anyone see an issue with this?