## Introduction

* Hi All, in this session I’ll give another update on the lead generation project.
* I’ll first quicky give a recap update:
  + I went through the General export Facility experiment which looks for Barclays client who are a exporter, we identified around 2,000 of such clients
  + Then I talked about automating the process of identifying Barclays clients and prospects who’ve won a public sector procurement contract recently. For this, testing for Octobers contacts we were able to match around 23% of the unique suppliers as Barclays client. I will talk about this some more later
  + 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 last months CDC meeting
  + Then I’ll give a brief talk about extracting data from Zeus to refine the experiments.
  + Then I’ll talk about he further progress with the procurement contracts
  + Finally I’ll talk about the first draft of the pilot plan for evaluating the opportunities.

# CDC:

* Since the last meeting, we have taken the project to CDC last month and we got data usage approval to use the data from the various systems such as payments data, customer and zeus.
* We were also given the go-ahead to start intialising the pilot plan which I will go into more detail later.

# 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 grade rating, 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 [data problem] I did notice there was a quite a few clients with no financial data information and there were some where the last updated date was a few years old.
* There were also two types of financial statements - standalone and consolidated.
* I also plan on using show this zeus data on the dashboard I’m building for mark Henderson in TWC so he can easily switch between the clients transactions and their financial ituation– does anyone see an issue with this?

# Public Sector Contracts

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

# Pilot

* First meeting last week
* How we measure value – soft measure – not only take up, relationship building
* Other initiatives
* Whos the stakeholders to get involved.
* Planned a second meeting which is happening tomorrow