**Case study – OPEN SMB Cards**

**Objective:**

To allow candidates to showcase their methodology on problem-solving and insight generation based on the current state performance of the OPEN Small Business card

**About the business:**

OPEN is a part of American Express that provides B2B services to small businesses in the United States. They help businesses with their day-to-day needs like:

* Expense Management
* Managing Cashflow
* Travel needs

Below is the URL for the page: <https://www.americanexpress.com/us/small-business/credit-cards/>

To provide all these services, they offer a variety of products with various features catering to different business needs. We have included the performance of 4 key card products for this case study.

**Marketing status:**

To sell their existing products and services, Amex currently leverages different marketing channels like

1. Organic Search
2. Paid search
3. Referral channels

**Key Objective:**

1. Prepare a dashboard with important KPIs for business stakeholders to give them a read of their month-on-month performance
2. Identify the top-performing products and channels
3. Identify 1 key issue that’s impacting performance and highlight possible reasons
4. Provide 3 key recommendations that would help improve performance

**Expected Output:**

* MS Excel dashboard covering all KPIs
* MS PowerPoint deck to showcase findings & recommendations to business stakeholders