What’s New with Analytics?
Meet Your Presenter

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Once Upon a Time...
Cultural Transformation
ORGANIZATIONS WITH THE FASTEST REVENUE GROWTH ARE:

108% Better at accessing and drawing insights from data.

84% Better at translating insights into action.

- IBM Research
VALUE

1. Behavioral
   - Transactional
   - Interactional / Quant
   - Browsing/Shopping
   - Mktg Response
   - Service Activity
   - Channel Usage
   - Levels:
     - Individual
     - Device - IoT
     - Corporate

2. Attitudinal
   - Interactional
   - Textual / Intention
   - Sentiment
   - Preference
   - Survey
     - NET Promoter
     - CSAT
     - Other

3. Demographic
   - Demographic
     - Age
     - Family Size
     - Income
     - Net Worth
   - Firmographic
     - Industry
   - # Emps, # Beds, etc
   - Revenue

USAGE FREQUENCY
Transactional Data Case Study
Interaction Data Capture

19 metrics
32 benefits
associated with planning and capturing activities in CRM solutions.

#1
CRM adoption issue: manual data entry.

- C5 Insight
- HubSpot

e-Book: Why CRM Activity Management?
Interaction Data: Call Intelligence

Integrate telephony recordings with Dynamics 365.
Using AI to Transform Unstructured Data into Structured Data for Analytics

Cognitive Services Data Creation
Text Analytics, Image Recognition, Speech Recognition
Data is the raw material of the 21st century. Relationships are what we are building.

— The LUCK Principle
Discovering Insights

Case Study
c5in.co/kone
Big Data

DESCRIPTIVE
The Rear-View Mirror

PREDICTIVE
The Front Window

PRESCRIPTIVE
The GPS
Integration - CRM / Business Intelligence
Cognitive Data / Descriptive Analytics

DESCRIPTIVE
The Rear-View Mirror
Preparing Data for AI

Customer

Transactions

Line Items

Common Data Model

<table>
<thead>
<tr>
<th>Customer</th>
<th>Last TransX</th>
<th>Overall Avg Time</th>
<th>Avg Purch</th>
<th>Last TransX</th>
<th>Product 1 Avg Time</th>
<th>Avg Price</th>
<th>etc</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>
Preparing Data for AI

Converters (successes)
- Qualified Leads
- Won Opportunities
- Large Won Opportunities

Score
- Prospects
- Leads
- Opportunities

Analytics Data
- External (Demographic/Firmographic)
- CRM (Lead/Opp/Acct/Contact)
- CRM (Activity)
- Other (Transactional)

Non-Converters (failures)
- Disqualified Leads
- Lost Opportunities
- Small Won Opportunities
Artificial Intelligence / Predictive Modeling
Internal Data

PREDICTIVE
The Front Window

Model outcome

Lead qualification rate: 57.14%
Max score: 98

A
Lead score range: 100 to 92
0.00% qualification rate (0.00% IP)
0.00% of total leads

B
Lead score range: 98 to 92
0.00% qualification rate (0.00% IP)
57.14% of total leads

C
Lead score range: 5 to 3
100.00% qualification rate (1.75x IP)
42.56% of total leads

D
Lead score range: 2 to 0
0.00% qualification rate (0.00% IP)
0.00% of total leads

Note: All values presented are based on historical data.
Data + Cognition + AI = Real-Time Recommendations

PRESCRIPTIVE
The GPS
Data + Cognition + AI = Coaching and Management

Integrate telephony recordings with Dynamics 365. Identify call best practices, sentiment influence, cadence and more.
Faster Continuous Learning
Know the Score

Share the Score

Give Everyone a Voice in Improving the Score
What are **Quick**, **Target** and **Long** Goals?

![Diagram showing performance over time with Quick, Target, and Long phases.](image)
KNOW YOUR SQAGs

Period of Focus on SQAG

Count of Activities
WRAP UP
LISTEN
#BigData #Integration #ROTII
Listen to people. Remember what they say.

UNDERSTAND
#Analytics #BI #AI #Search
Distribute and analyze data to discover insights.

CONNECT
#Process #Action
People-centric analytical processes.

KNOW
#SQAG #KPI #Collaborate
Know, share and improve the score together.

GOOD LUCK
#Culture #Purpose #PoweredByLUCK
Use digital workplace tools to create a more people-centric LUCK-based culture.
People don’t want to feel like a number, people want to know that they count.

- The LUCK Principle
Questions and Resources

Customer and Employee Experience
CRM, Intranet, Digital Workplace

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Process Adoption
E-Book: Why Adopt a CRM Activity Management Process
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