



Use Case: Market Penetration Analysis and Campaign follow-up using Esri Maps for Microsoft Dynamics

You currently sell your product to a large retail chain on the west coast, you want to expand your business across the entire country and want to use your sales data with Customer Segmentation and Demographic data to come up with a potential list of areas you want to tackle first. The following are questions you are trying to answer using your Dynamics CRM data and Esri Enrichment data that you have brought in to your CRM database:

1. What Zip codes are my highest selling areas and what is the dominant Tapestry?
2. What Zip codes have the Highest Market Penetration and how can this help me decide on where to focus my sales efforts?
3. Where are other areas (Zip Codes) that have the same dominant tapestries across the country?

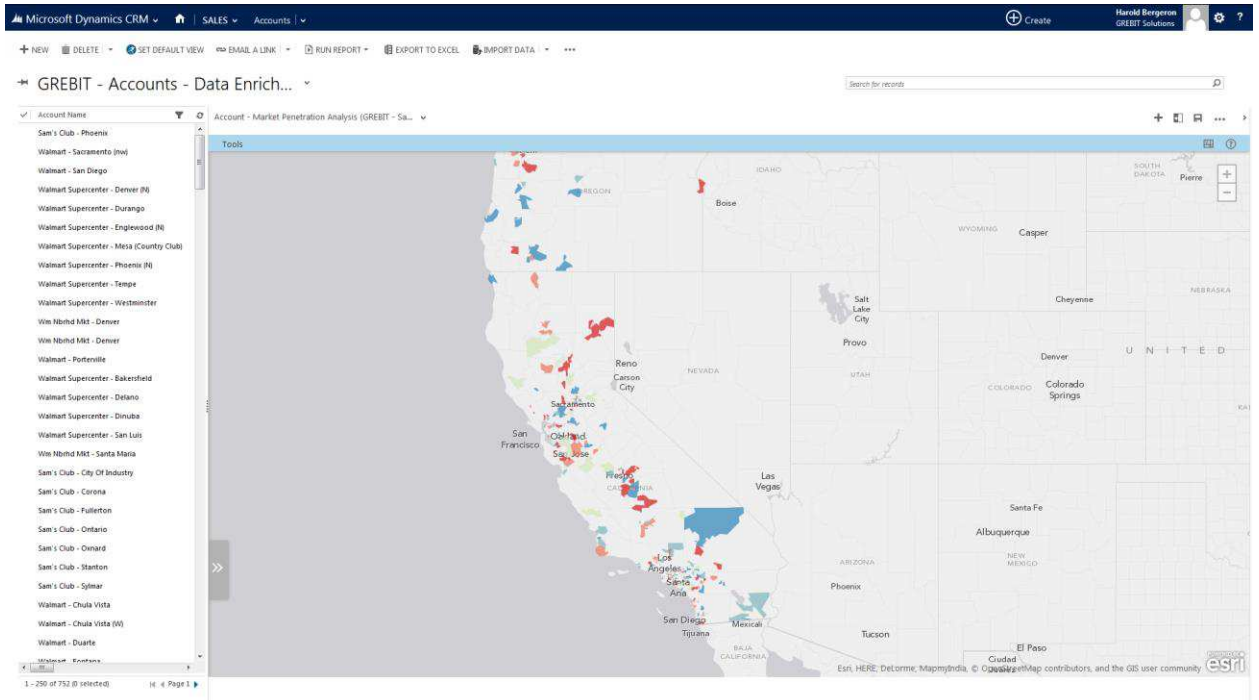
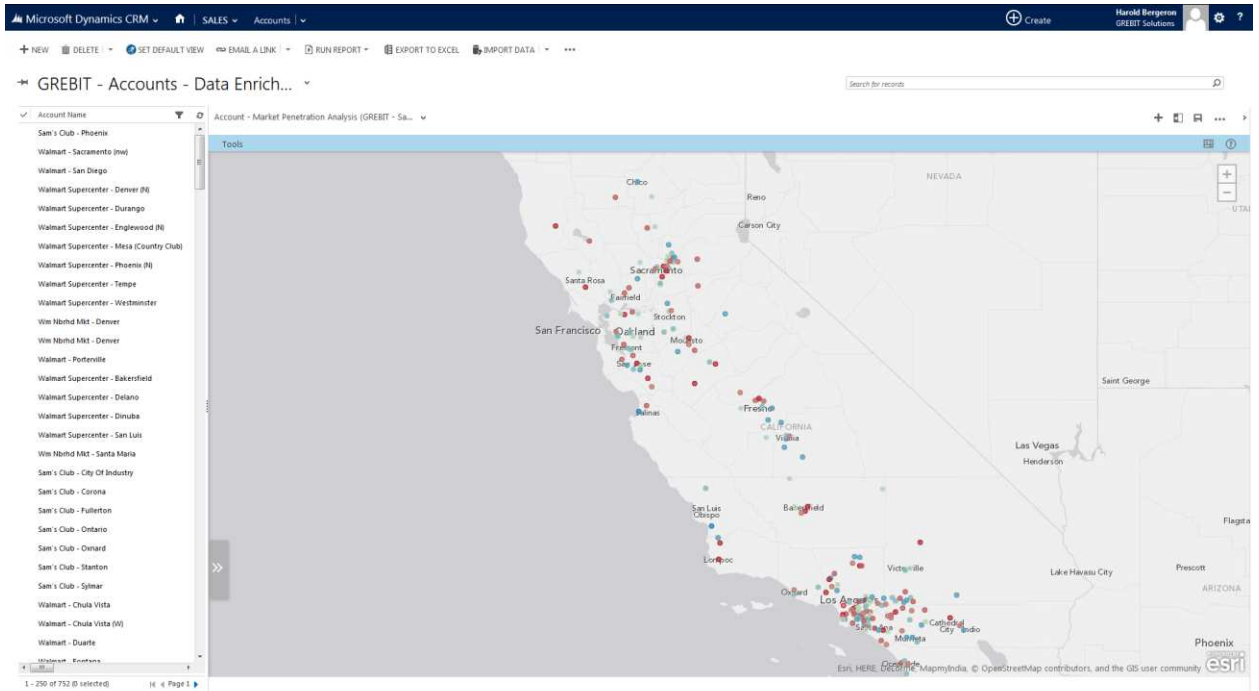
What Info do I have within Dynamics CRM, Esri and GREBIT Solutions summary entities?

- I know where my customers are
- I know what the Top Tapestry is for each customer within a 3 mile drive time
- I know the Total Revenue by Tapestry (High to Low)
- I know How many clients I have in each Tapestry
- I know How many Potential Clients I have by Tapestry and Zip Code
- I know what my Market Penetration is by Tapestry
- I know how many clients I have by Zip Code, which can give me the top tapestry by zip code
- I know what my Market Penetration is by Zip Code

What Zip codes are my highest selling areas?

- Map Total Sales by Zip code (centroid – Red is Hot, Blue is Cold) or
- Map Total Sales by Zip Code

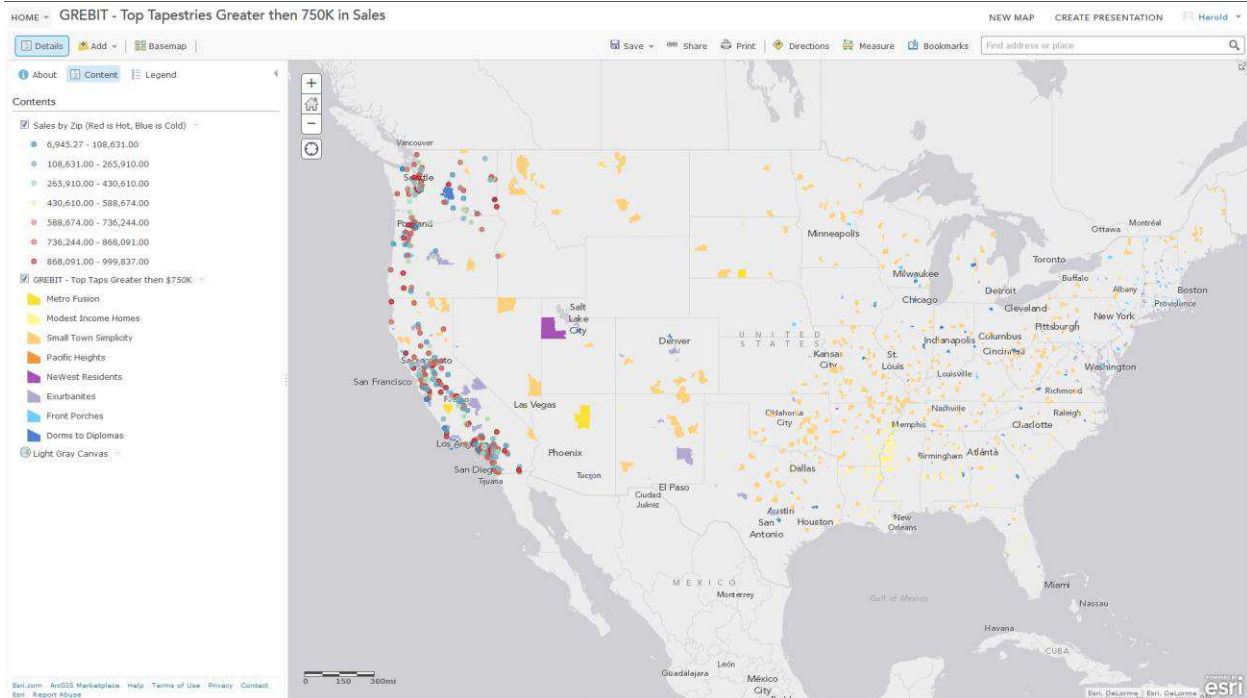
Note: Both of these layers use GREBIT Account Summary by Zip Code Entity



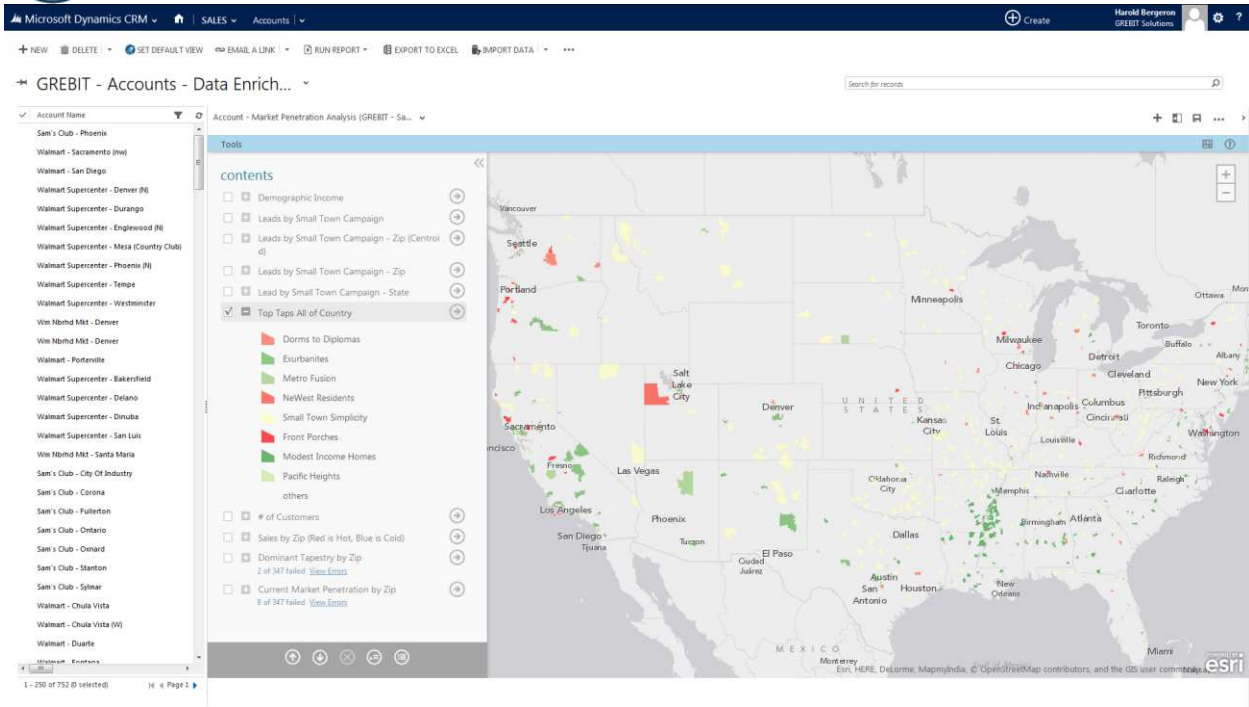
What are the dominant tapestries for each one of these Zip Codes?

- By Sharing my Sales by Zip Code (GREBIT Summary Entity) to ArcGIS Online I can then use it to find out what my top tapestries are for Sales >= \$700,000
- Using this new Map Layer that was created within ArcGIS Online I share it and then use it within Microsoft Dynamics CRM

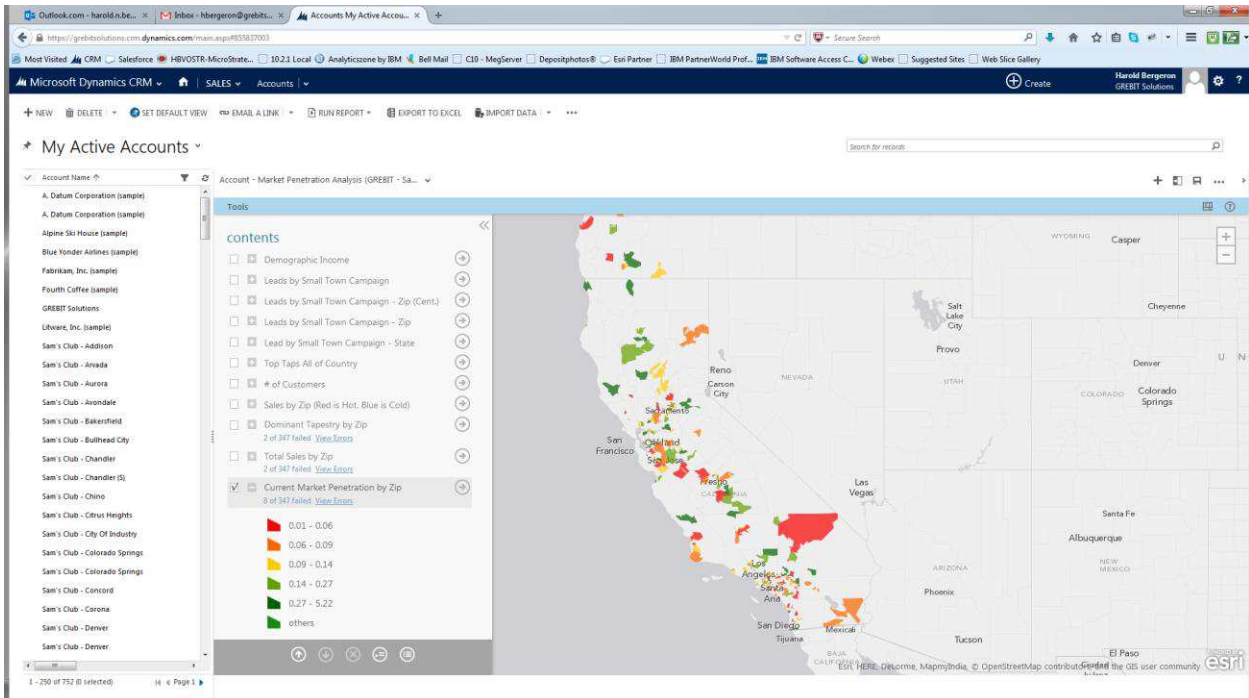
Note: It not only gives me the zip codes I am currently selling in but all other zip codes that have these top tapestries across the country



Now that I have the Top Tapestries I want focus on, I can import them into Dynamics CRM and use them for future analysis.

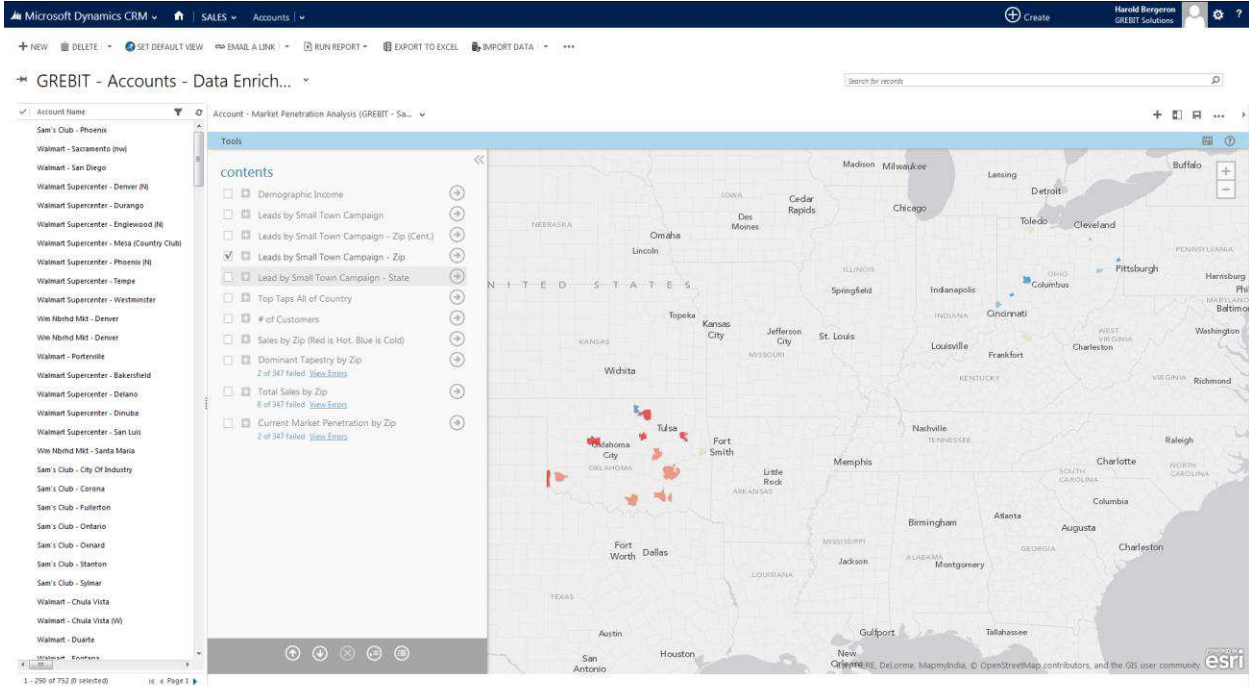
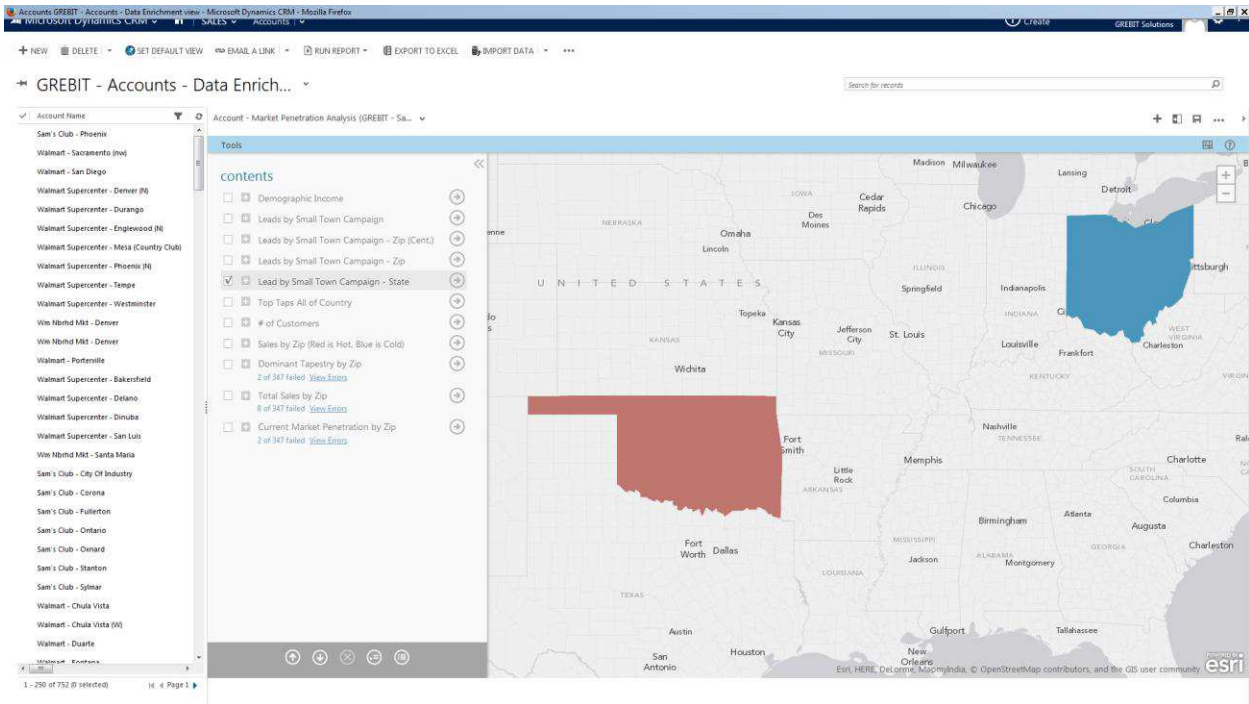


Using GREBIT Solutions pre-configured 'Market Penetration calculation' I analyze and decide to create a campaign for 'Small Town Simplicity' as I notice that this customer segmentation has a greater number of potential clients available in each area.

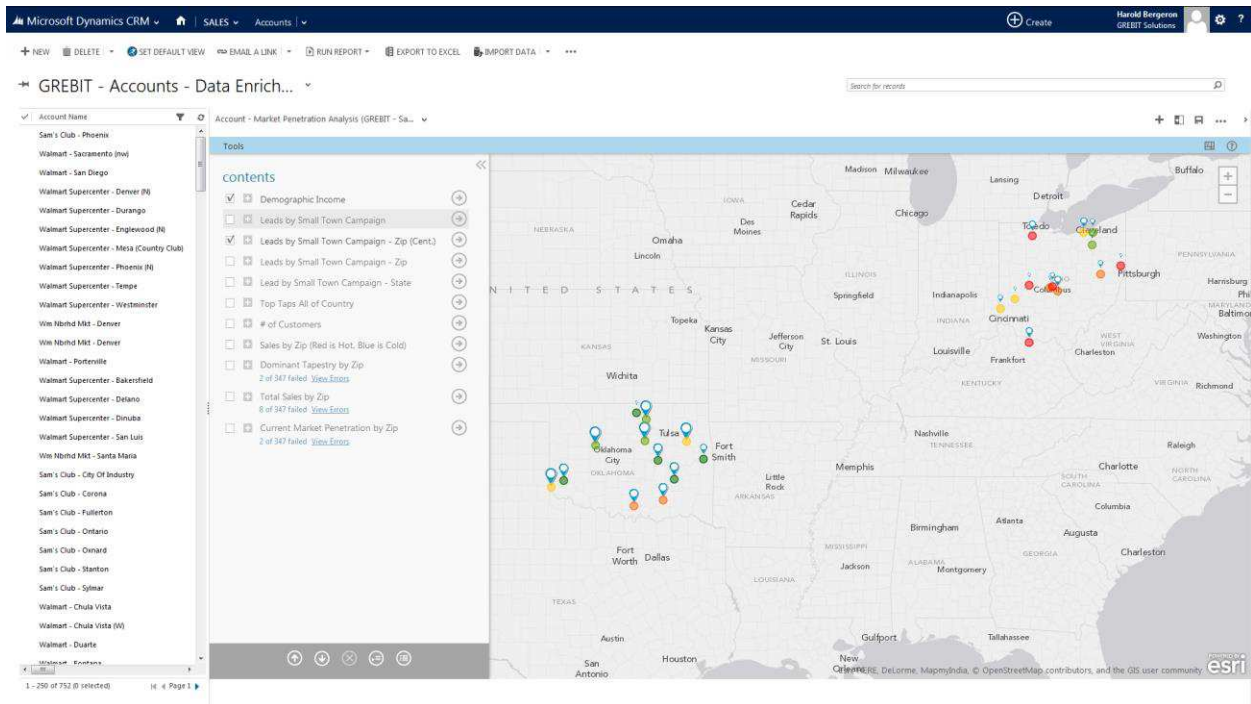
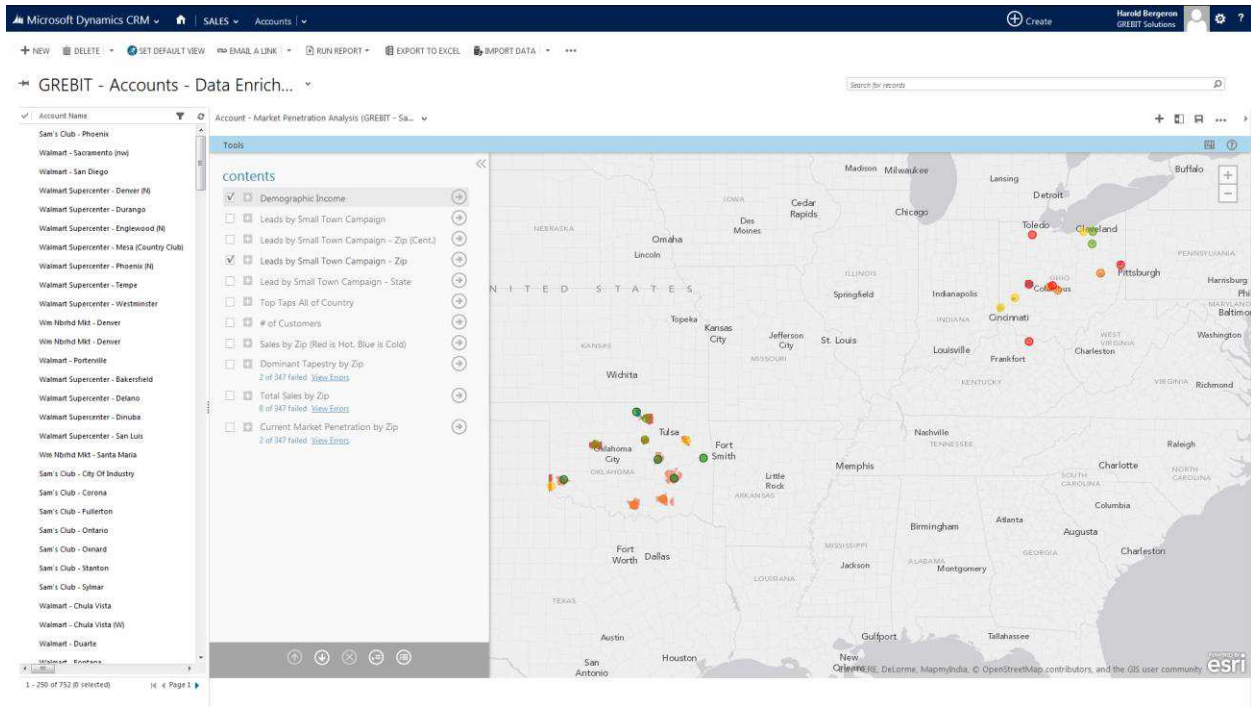




The campaign is focused on a couple of states (Oklahoma and Ohio). Using GREBIT Lead Summary by State and GREBIT Lead Summary by Zip I start analyzing how this specific campaign (Small town Campaign) is doing.



I notice that the campaign is doing much better in one state versus the other (Oklahoma), even though I'm focusing on the same Top Tapestry Segments something else is affecting my results. I decide to overlay some other 'Demographic Data' to see if I can spot another correlation. In this case I use 'Average salary per household' by Zip to see if that could be it. I quickly notice that the areas I'm doing much better (Oklahoma) the Average Household Income is higher in those areas (GREEN dots) and in Ohio the Average Household Income in those areas is lower (Red and Yellow dots). This could be another factor I should consider when trying to open new markets.





Conclusion:

As you can see this analysis can truly add insight to why your business is doing so well in certain areas and not so well in others. In this sample we used just 2 Enrichment layers but you would most likely come up with half a dozen key Segmentation and Demographic characteristics to analyze before making a final decision on where to concentrate your sales efforts. GREBIT Solutions summary entities and functionality can make this task much easier.