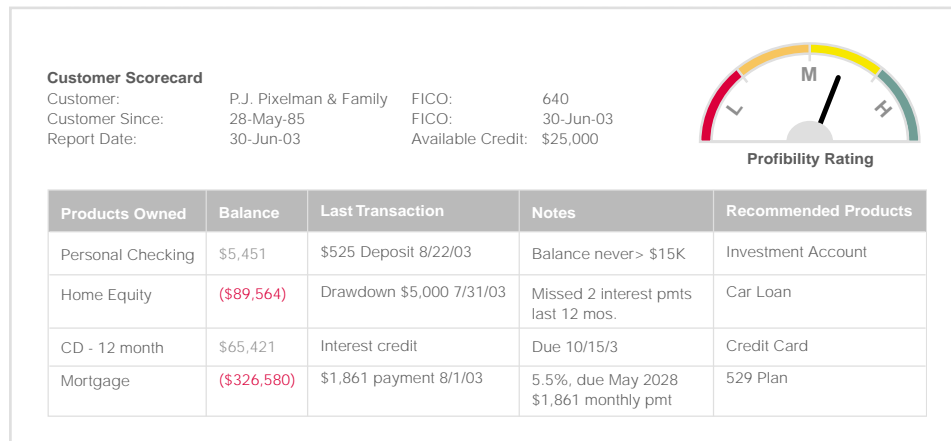


Customer Scorecards

Customer scorecards are “at-a-glance” reporting mechanisms that provide insight into the health of a customer relationship. Scorecard contents vary and are typically customized to the needs of an organization. Scorecards include both a comprehensive view of a single customer and a bird’s eye view of trends across a company’s customer base. Scorecards help align executives, sales representatives and marketing managers to focus on the key drivers of profit and long-term customer relationships. Scorecards give users the ability to view data from multiple data sources in a single, intuitive format – combining tables, charts and graphics. More advanced users can drill into the scorecard to understand transaction detail, review profitability or monitor interactions.

Sample Report: Scorecard for Individual Customer



This customer scorecard offers a quick snapshot of an individual customer relationship, recommended products for cross-sell, and customer profitability. Sales professionals, customer service representatives or marketing analysts would use this information to make decisions when preparing for a customer meeting or actively serving a customer. Next steps in this analysis would be to develop plans to cross-sell to this customer, analyze trends in individual product balances and payments, or research the trend in the customer’s credit worthiness.

COMMON BUSINESS QUESTIONS

- What has been the migration of customers across revenue bands over time?
- What is the churn rate within the most profitable customer segment?
- What is the distribution of new and existing customers for the current year?
- What are the average acquisition costs for all customers per quarter?
- What is the monthly trend in counts of active, new, lost and retained customers?
- What products does Customer X own?
- How do this year’s customer satisfaction levels compare to last year?
- What is the regional distribution of the most profitable customer segment?

Key Performance Indicators

- % Change in Satisfaction Rating
- Top 10 Orders per Region
- Sales by Related Product
- Average Revenue per Customer
- Bottom 10% of Customers
- Profit per Customer
- Lifetime Value
- Cost per Campaign
- ROI per Customer Segment
- % Conversion of Customers to Loyal