

## **Energy sector case study**

Reorganize and optimize data holdings to improve internal processes, reduce cancelled contracts and capitalize on existing customers with cross-selling, up-selling and retargeting activities



# Energy Sector: Discovery



## PROBLEMS

There was a lack of data collection and analysis to define an effective sales strategy. The company lacks a unified vision between product and customer needs, digitization and centralization of data, marketing and automation, and finally metrics. The result is an unclear offer, but mostly by the presence of several customers who proceed with the cancellation of the contract and others whose value remains unchanged as they are not subject to capitalization activities.



## SOLUTIONS

Development and implementation of retargeting and cross-selling processes starting from the identification of the software used, products and services sold, target customers, channels and sales stages. All this is organized using an agile project management structure.

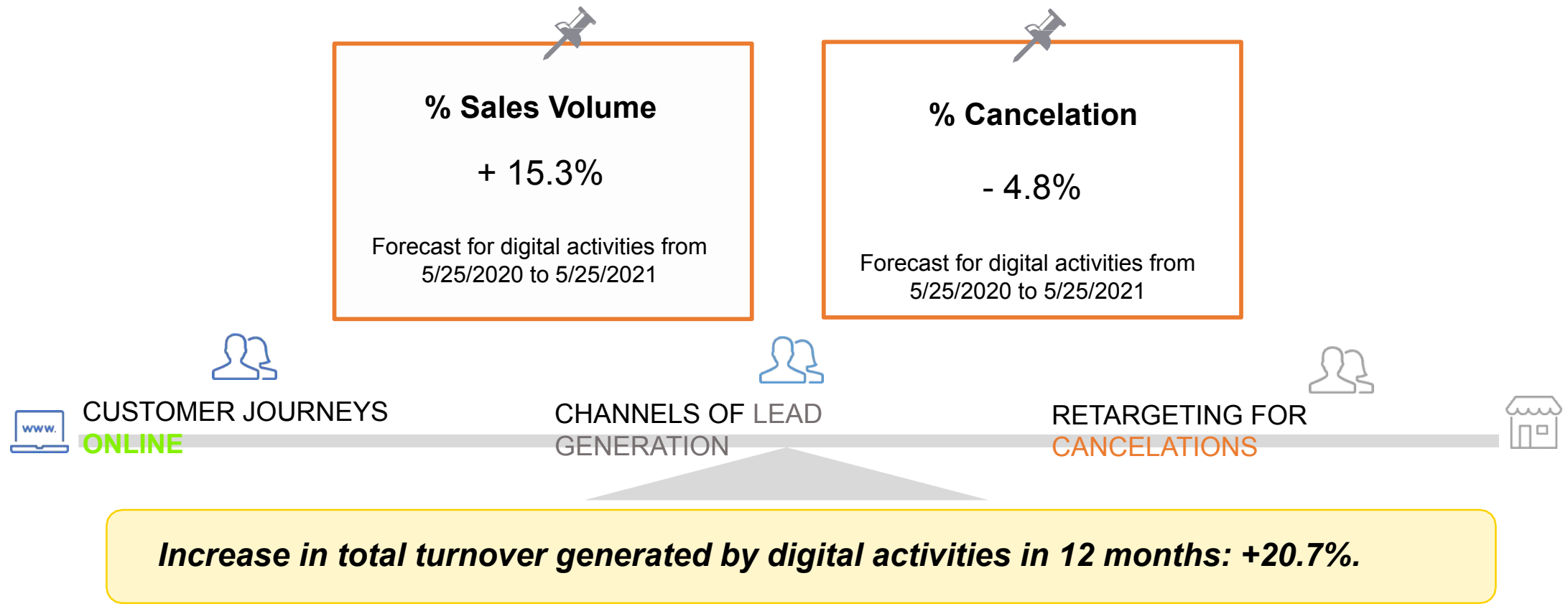


## OBSERVATIONS

The idea was to start with data sources to create a strategy for accessing sales channels and outlining the focal points of the customer journey. According to this approach, consumers find inspiration, search online, choose and validate, buy and pay, and share on social. Thanks to Bayesian analysis, through various workshops with the company two ad hoc customer journeys were designed based on retargeting and cross-selling.

# Energy Sector: Results

The results of digitalization activities for a company operating in energy sales, using the door-to-door channel with 21,000 contracts per year, 15% cancellations (of which 6% for Credit Risk). The return on investment for all digital activities was quantified as +20.7%.



# Leading energy innovation company

**Retargeting**  
ROI INCREASE

Analysis to improve the percentage of cancelled contracts

**Cross-selling**  
INCREASED TURNOVER

Identification of products to propose to existing customers and development of hyper targeting campaigns

**Lead generation**  
TARGETED CONTACTS

Content development, advertising campaign on Facebook to schedule meetings with potential customers and increase new contracts

**Machine learning**  
INCREASED OPERATIONAL EFFICIENCY

Analysis of terminated contracts to identify the main causes of agreement termination and to decrease cancellations and credit risk

**Recruiting**  
INCREASED RETENTION RATE

Top vendor analysis, recruiting channel identification and end-to-end process automation



**+ 0.6%**

SALES VOLUME



**+ 1.8%**

SALES VOLUME

Previsio  
ni



**+ 1.7%**

SALES VOLUME



**+ 4.8%**

SALES VOLUME



**+ 6.4%**

SALES VOLUME

# Innovation: Goals, Strategy and Activities

## Recruiting

## Machine Learning

## Cross-selling

Target	Automation of the commercial agent recruitment process to increase contracts from the door-to-door channel	Define the main causes of contract termination	Capitalize on existing contracts by promoting additional products/services of possible interest
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**+ 6.4% + 4.8% + 1.8%**

SALES VOLUME SALES VOLUME SALES VOLUME

Strategy	<ul style="list-style-type: none"> <li>Demographic and psychographic analysis of TOP sellers to define target person for recruitment in order to increase retention rate and decrease turnover</li> </ul>	<ul style="list-style-type: none"> <li>Demographic and psychographic analysis using Bayesian network model to identify factors affecting reduction in cancelled contracts</li> </ul>	<ul style="list-style-type: none"> <li>Data collection and analysis of consumer preferences to capitalize on existing customers in a targeted manner</li> </ul>
Activities	<ul style="list-style-type: none"> <li>Monitoring the volume and conversion rates of each stage of the recruiting process, from application to hiring</li> <li>Design and implement a new 100% automated recruiting journey via APIs</li> <li>Data collection and demographic and psychographic analysis of top sellers</li> <li>Creation of target personas to post targeted job off</li> </ul>	<ul style="list-style-type: none"> <li>Collection and segmentation of demographic and psychographic data</li> <li>Bayesian network data analysis to decrease cancelled contracts</li> <li>Dashboard in power BI to validate credit risk reduction by capitalizing on web and SDD bills</li> </ul>	<ul style="list-style-type: none"> <li>Creation of the Google Form to collect daily data from sellers</li> <li>Bayesian network to identify segments for cross-selling</li> <li>Cross-selling customer journey design and implementation</li> <li>Cross-selling campaign support</li> </ul>

# Innovation: Goals, Strategy and Activities

	Lead Generation	Retargeting	Referral
Target	Increase contracts through social campaigns targeting a specific market of potential customers	Increase the percentage of contracts confirmed following cancellation	Incentivize loyal customers to recommend new ones customers

**+ 1.7% + 0.6% + 0.4%**

SALES VOLUME SALES VOLUME SALES VOLUME


Strategy	<ul style="list-style-type: none"> <li>Analyze and define target person to then create content of specific interest for direct sales from online channel of products/services</li> </ul>	<ul style="list-style-type: none"> <li>Creation of an automated system to recover customers who have withdrawn from the service</li> </ul>	<ul style="list-style-type: none"> <li>Convert loyal customers, through gift certificates and/or promotions, into ambassadors (brand ambassadors) to create a new automated customer acquisition channel</li> </ul>
Activities	<ul style="list-style-type: none"> <li>Creation of banners, carousels and videos for lead generation</li> <li>Creation of responsive landing pages dedicated to lead generation</li> </ul>	<ul style="list-style-type: none"> <li>Design and implementation of "customer journey" for retargeting</li> <li>Analysis and support of retargeting campaigns</li> </ul>	<ul style="list-style-type: none"> <li>Customer data analysis on first purchase</li> <li>Design and implementation of customer journey and referral channel</li> <li>Automated flow creation with two or more touch points (e.g. sms, email, Facebook retargeting etc.) to sponsor the "bring a friend" campaign</li> </ul>


# Need more information?

We're ready to listen  
Call us or send us an email



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