



COMPLEXICA

# Customer Opportunity Profiler (COP)

Actionable recommendations increase customer lifetime value

## Opportunity

**Is your sales team getting the most out of each customer conversation?**

Customers are gradually becoming more knowledgeable and sophisticated, which results in increased pressure on vendors and suppliers to deliver more value. Sales reps that can “value-add” to their customers - by providing personalised insights and recommendations - will outperform the “walking brochure” sales reps of yesterday.

However, the primary obstacle that prevents sales reps from becoming more “value-adding” is a lack of appropriate sales tools. Without technology to support their conversations with customers, the only way sales reps can “value-add” is by becoming analysts and conducting considerable research on the customers and prospects within their territory. On top of this research, sales reps would need to be familiar with the company’s entire product range (along with its associated prices, margins, product substitutions, and complimentary products) so they could deliver the right message to the right customer at the right time. The sheer volume and complexity of data involved in the process would make it a daunting feat for any human being without the use of technology.

IDC (International Data Corporation) has recently released results of The Future Enterprise Resiliency and Spending (FERS) survey conducted among technology buyers. According to the survey results, 78% of respondents said that data is ‘critical’ for CX (customer experience) delivery, with 21% indicating that data plays an ‘extremely significant’ role.



**Many organisations, despite being data-rich, lack essential tools and mechanisms to leverage the data effectively and deliver better financial outcomes**

## Solution

To address the inefficiencies in sales call planning and customer engagement processes, many companies turn to software to digitalise, automate and optimise their sales call cycle workflows. By leveraging the power of Artificial Intelligence, Complexica’s cloud-based Customer Opportunity Profiler (COP) learns continuously from sales and customer data, allowing sales reps to access data-driven actionable insights and recommendations in real-time while interacting with customers. Complexica’s COP is powered by our proprietary AI engine Larry, the Digital Analyst® that transforms raw data into optimised recommendations, or Next Best Conversations™ (NBCs) for each call or visit.

By having all sales and customer data at their fingertips, sales reps can significantly improve sales conversations, increase customer engagement and deliver better sales results for the business unit. COP provides a unique competitive advantage over other businesses that don’t have a unified system that can learn, adapt and deliver increasingly improving results with every usage.

## Use Case

Complexica’s COP helps businesses increase sales and reduce churn by providing reps with data-driven actionable recommendations



## COP/CRM integration

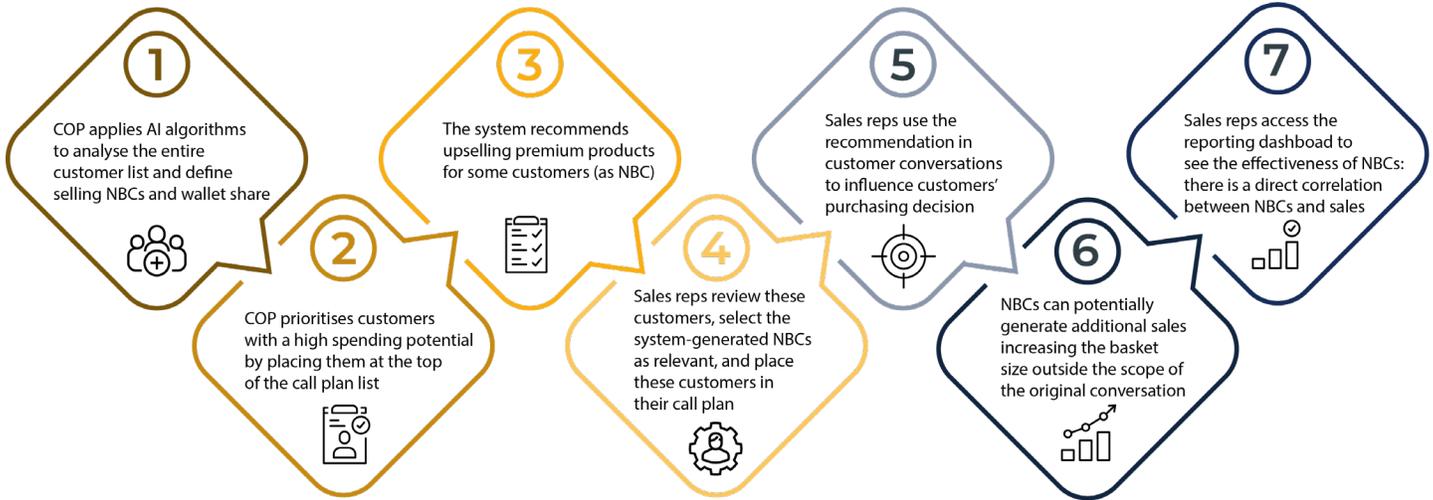
COP is bundled with Complexica’s proprietary CRM (or can be integrated with the existing CRM) to complement and enhance sales data



# Why invest in sales call cycle optimisation?

- Improved bottom line
- Increased sales force effectiveness
- Stronger customer relationship

## Sales call cycle workflow with Complexica's COP



NBC = Next Best Conversation™

	<b>COP</b> A simple easy-to-use call cycle planning and optimisation system. Suits smaller sales teams used to operating in Excel	<b>COP Advanced</b> A more sophisticated call cycle planning and optimisation system with additional features. Ideal for larger sales teams selling a large product range to a long tail of customers
WALLET SHARE ANALYSIS	✓	✓
BONUS CRM ADD-ON	✓	✓
REPORTING DASHBOARD	✗	✓
CROSS-SELL/UPSELL OPPORTUNITY PROMPTS	✓	✓
OPTIMISED PRICING NBCs	✗	✓
BASKET GROWTH OPPORTUNITY PROMPTS	✗	✓
GAP ANALYSIS	✗	✓
FREQUENT PURCHASES ANALYSIS	✗	✓
PRIORITISED CUSTOMER CALL PLANNER	✓	✓
CUSTOMER SEGMENTATION BY SPEND	✓	✓
CUSTOMER SPEND REPORTS	✗	✓
BRAND SUBSTITUTION PROMPTS	✗	✓
CUSTOMER CHURN PROMPTS	✓	✓
OPTIMISED ROUTE PLANNING	✗	✓
	Project delivery: up to 16 weeks from scoping to implementation	Project delivery: up to 32 weeks from scoping to implementation

### COP options

Complexica's COP can be deployed as either a "lite" solution that includes all the essential features for sales call cycle optimisation, or as a more advanced solution depending on the customer needs.

# Benefits of sales call cycle optimisation



## Increased wallet share

COP automatically identifies cross-sell opportunities for each customer



## More sales calls

Sales reps spend more time in front of more customers due to reduced non-selling time and streamlined call planning workflows



## Increased sales yield

COP directs sales staff to the highest-value opportunities or potential problems in each territory



## Efficient use of data

AI-augmented sales reps leverage customer and sales data to engage customers in meaningful sales conversations



## Lower customer churn

COP automatically identifies customers at risk of potential churn and suggests appropriate actions



## Stronger relationships

COP suggests personalised NBC recommendations for each customer increasing customer engagement

