

# Customer Opportunity Profiler (COP)

Actionable insights increase customer lifetime value

## Background

**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 solutions - 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 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 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 cycle workflows. By leveraging the power of Artificial Intelligence, Complexica’s cloud-based Customer Opportunity Profiler (COP) learns continuously from sales data, allowing sales reps to access data-driven actionable insights and recommendations in real-time while interacting with customers.

By having all 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 with data-driven actionable insights.



## 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



NBC = Next Best Conversation

	COP Lite A simple easy-to-use call cycle planning and optimisation system. Ideal for smaller sales teams used to operating in Excel.	COP Enterprise A more sophisticated call cycle planning and optimisation system with additional features. Ideal for larger sales teams operating with a long tail of customers and a large product range.
WALLET SHARE ESTIMATE		
NBC PROMPTS		
REPORTING DASHBOARD		
CROSS-SELL OPPORTUNITY PROMPTS		
UPSELL OPPORTUNITY PROMPTS		
BASKET GROWTH OPPORTUNITY PROMPTS		
GAP ANALYSIS		
FREQUENT PURCHASES ANALYSIS		
BONUS CRM ADD-ON		
CUSTOMER CALL PLANNER		
CUSTOMER SEGMENTATION BY SPEND		
CUSTOMER SPEND REPORTS		
CUSTOMER CHURN PROMPTS/A.ERTS		
EXTERNAL DATA ANALYSIS		
	Up to 16 weeks from scoping to implementation	Up to 32 weeks from scoping to implementation

## COP options

Complexica's COP can be deployed as either a "lite" version (with an optional feature-rich upgrade later on), or as a complete package depending on the customer needs.

# Benefits



## Increased wallet share

COP automatically identifies cross-sell opportunities for each customer



## More sales calls

COP enables sales reps to spend more time in front of more customers by reducing non-selling time and streamlining 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 have meaningful sales conversations



## Lower customer churn

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



## Stronger relationships

COP suggests personalised Next Best Conversations (NBC) recommendations for each customer increasing customer engagement

