Solution Guide:
Predictive Account Segmentation & Scoring

PREDICTIVE ACCOUNT SEGMENTATION AND SCORING

WHAT IS MARKET SEGMENTATION?

The purpose of market segmentation is to identify high-yield categories of customers and prospects in order to increase sales revenue and retain existing accounts. High-yield segments are those categories of customers that are likely to be the most profitable or have the most potential for growth. Typically, companies start by determining the overall market available to them, called the Total Addressable Market or TAM. TAM is then divided into smaller groups known as segments.

Segmentation is also used to develop profiles to identify key markets in order to better understand account needs and motivation. Key segments are then selected for targeting and positioning products and services in a way that is likely to resonate with the selected market.

Analysis of shared account attributes, or characteristics, allows analysts and systems to assign points or grades to each account and group accounts into segments and sub-segments. Marketing and Sales organizations can then use this information to develop campaigns for lead development, opportunity prioritization and pipeline optimization, marketing fund allocation, sales rep capacity planning, and territory and quota planning.

B2B sellers might segment the market into types of businesses (key accounts, enterprise, SMB, or vertical industries), and geographic locations. B2C sellers might categorize market segments by demographic (age, gender, etc.), lifestyle, geographic, and behavioral similarities.

Most often, market analysis is done using Firmographic and Psychographic data. Firmographic data is **Quantitative** attribution of individual accounts such as:

- o   Annual revenue
- o   Number of employees
- o   Industry
- o   SIC code
- o   Geographic location

Businesses enrich internal account and transactional data with the above types of attributes in order to perform analysis. Data can be enriched via sources like Dunn & Bradstreet, InsideView, Clearbit, and government agencies fairly cheaply. Internal data is known as first-party data.

Psychographic data is **Qualitative** attribution used in analysis for segmentation. When a relatively complete profile of a person or group's psychographic make-up is constructed, this is called a "psychographic profile." Categories of psychographic attributes used in market segmentation include:

- o   Activity, interest, opinion (AIOs)
- o   Attitudes
- o   Values
- o   Behavior

Marketers often hire commercial research firms to carry out segmentation analysis, especially if they lack the statistical skills to undertake the analysis themselves. Some segmentation, especially post hoc analysis, relies on sophisticated statistical analysis.

MARKET SEGMENTATION LIMITATIONS AND CHALLENGES

B2B decision-making in the segmentation process is highly complex. Businesses are more rational and buy based on needs rather than wants. Purchases are often based on relationships as well as needs and often involve multiple people

and departments. B2B solutions are often tailored for a specific customer and buying cycles are longer. There are more reasons to ignore segmentation data, including that:

- It fails to identify sufficiently narrow clusters.[23]
- Geographic/demographic segmentation is overly descriptive and **lacks sufficient insights into the motivations necessary** to drive communications strategies.[24]
- In B2B, often you don't see the full picture:
    - What you see: Internal data, systems, intuition, experience, etc.
    - What you do NOT see: Everything else.
- There is complexity in sales models, global impacts.
- There is a lack of ability to consolidate Customer and Prospects data.
- There is limited insight for business development purposes, which doesn't specify how much effort should be expended on each account.
- Cannot inform the approach to take when developing relationships with key individuals.

For these reasons (and more), it's always necessary to provide the ability to override calculated account scores or rank when using an automated solution.

Lately, businesses are turning to tier-based segmentation, which is more subjective than relationship-based segmentation. Each segment reflects the long-term value of customers or prospects. These segments define the accounts to which key account management techniques will be applied. Tier-based account segmentation means that the business development team must think more deeply about the value and potential contribution from each account. This method of segmentation should also be enhanced with firmographic data. When quantitative firmographic data is combined with a qualitative subjective approach, it often makes for a well-informed strategy.

PREDICTIVE MODELING AND AI

Advanced technologies such as machine learning (ML) and artificial intelligence (AI) allow further analysis and predictive modeling using both first-party (internal) and third-party data. In fact, initial TAM calculation, market segmentation, and scoring can be performed using predictive models without human intervention from Marketing Analysts/Sales Operations. However, when it comes to account scoring and weighting attribution, most businesses rely on individual business knowledge, as there are often intangible factors needed to make decisions.

THIRD-PARTY DATA

Third-party data can be collected and merged with first-party data to provide a bigger picture of each account profile by using advanced technologies. Third-party data includes information such as indicators based on content gleaned from web browsing and social media postings. Individual companies and individuals can be matched to this data. Examples of attribution based on third-party content are:

- Firmographic data.
- Financial growth.
- HR trends: open positions, existing positions, departments.
- Technology and install base, e.g., already have cloud technology.

- What content companies are researching online? Which ads are clicked?
- Have researchers visited my website? What products/links were clicked?
- When were sites visited, how much time was spent?

Some AI indicators might lead to better behavioral segmentation typically used for consumer-based buying.

- Benefit-sought: e.g., economy, quality, service level, convenience, access.
- Buyer readiness: e.g., unaware, aware, intention to buy
- Attitude to Product or Service: e.g. enthusiast, indifferent, hostile; price conscious, quality conscious
- Adopter Status: e.g. Early adopter, late adopter, laggard

PREDICTIVE SEGMENTATION AND SCORING PROCESS IN ANAPLAN

The new Predictive Account Segmentation and Scoring application combines planning and "what-if" capabilities with AI insights. This allows CMOs and sales ops to perform analysis using intelligent insights while they retain the ability to apply "tribal knowledge" and specific company experience for segmentation and individual accounts.

BENEFITS OF COMBINING ACCOUNT SEGMENTATION AND SCORING PLANNING WITH PREDICTIVE AI

- Intelligently compare Anaplan calculated scores to the Predictive Model's AI score and ranks, and override based on recommendations and buying indicators at the account level.

  - Leverage list of suggested account reviews based on score comparison.

  - Review account intents vs. calculated weighted score in context, at the account level, for greater insight.

  - Retains the ability to override segment and score based on personal account knowledge and relationship.

  - Use predictive score/rank and overrides for final account scores.

- Plan and model segments by geographic hierarchy, Industry, and other dimensions.

  - Bring in scored account data and it is automatically rolled up into the geographic hierarchy.

  - Can model/pivot and analyze by industry and other qualitative attribute dimensions.

- Analyze buying intentions to change quantitative attribute weighting.

  - Add additional segment attributes and/or change weights based on top ideal customer profile (ICP) indicators and buying signals where applicable.

  - Anaplan model recalculates in real-time with suggested changes.

ACCOUNT SEGMENTATION AND SCORING OVERVIEW

This is the landing dashboard: Account Segmentation & Analysis -> **Account Segmentation & Scoring Overview**
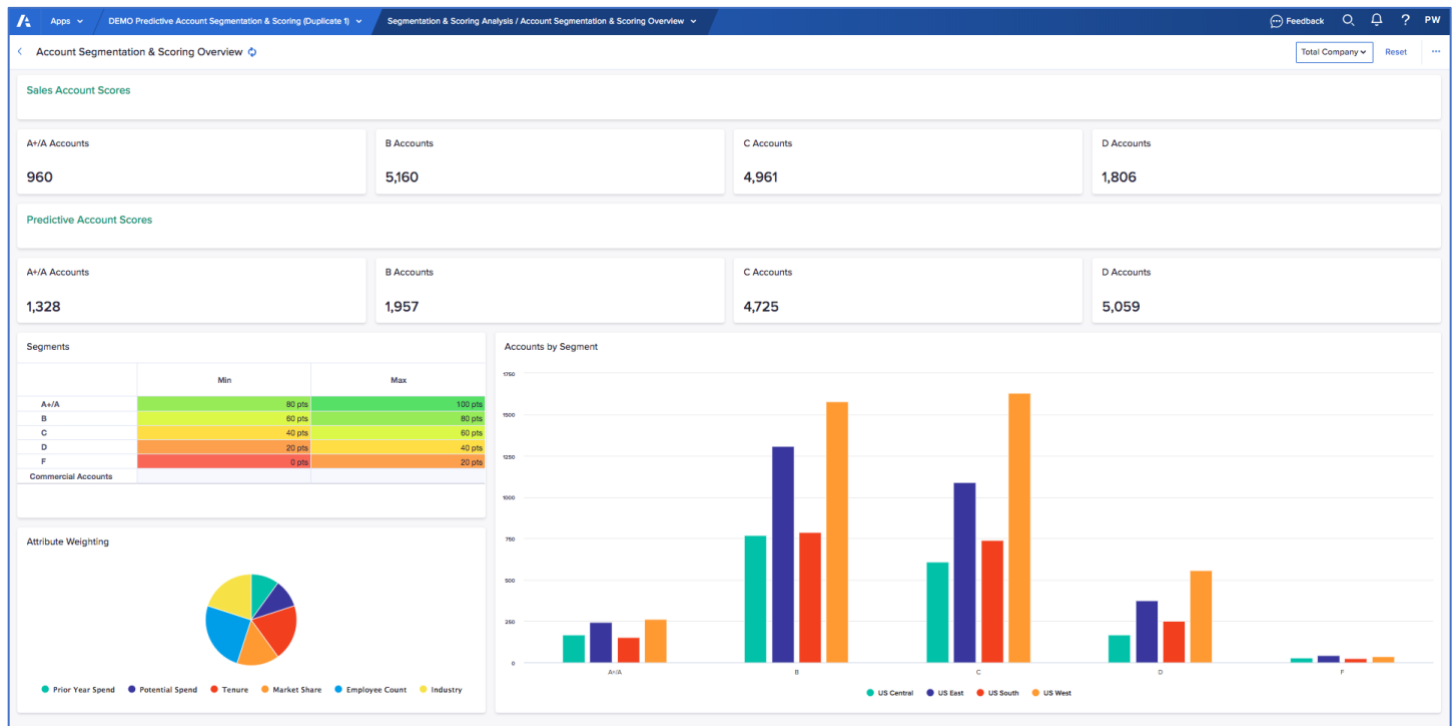
Navigate to the Overview dashboard to talk about Anaplan segments and scoring vs. AI scoring.

Segments, Attribute Weighting, and Accounts by Segment used for the Anaplan model and to calculate the Sales Account Scores are more subjective and typically based on firmographic data and marketing analyst/sales ops analyst analysis and experience. Predictive Engine AI scores are based on firmographic data as well, but are also based on third-party fit indicators based on the ideal customer profile (ICP); intents based on existing customer wins and those accounts who most resemble those wins. Machine learning algorithms are applied to identify top intents based on third-party online digital footprints and are appended to account and opportunity data. Once indicators and intents are identified, additional optimization is performed via propensity modeling, which applies additional machine learning logistic regression and gradient boosted decision trees. Final results are used to score and rank accounts. The data-driven insights on profile fit and buyer intent are used to determine the ICP, which is different for every customer implementing Predictive Account Segmentation and Scoring.

- The main KPI shows a side-by-side comparison of accounts for each segment. The AI segments are set, e.g., always ranked and clustered with A, B, C, and D identifiers.

- Anaplan segments are set up and can be customized within the application. For comparison and presentation purposes, we used the same segment names as the AI platform for the demo. Customers will most likely use their own segment names, for example, Key Accounts, Enterprise, Mid-Market, and Vertical, or whatever suits their industry and products.

    - The left side of the page displays the Anaplan Segments along with the number of points used for scoring each cluster.

- The pie chart in the lower left corner displays the quantitative and qualitative attributes and the weighting of each that was used in calculating account scores.

The column chart displays the number of Accounts by Segment (Anaplan segment). When different levels are selected at the top of the page, the chart is synchronized for that region or sub-region.

SEGMENT ANALYSIS

Account Segmentation & Analysis -> **Segment Analysis**
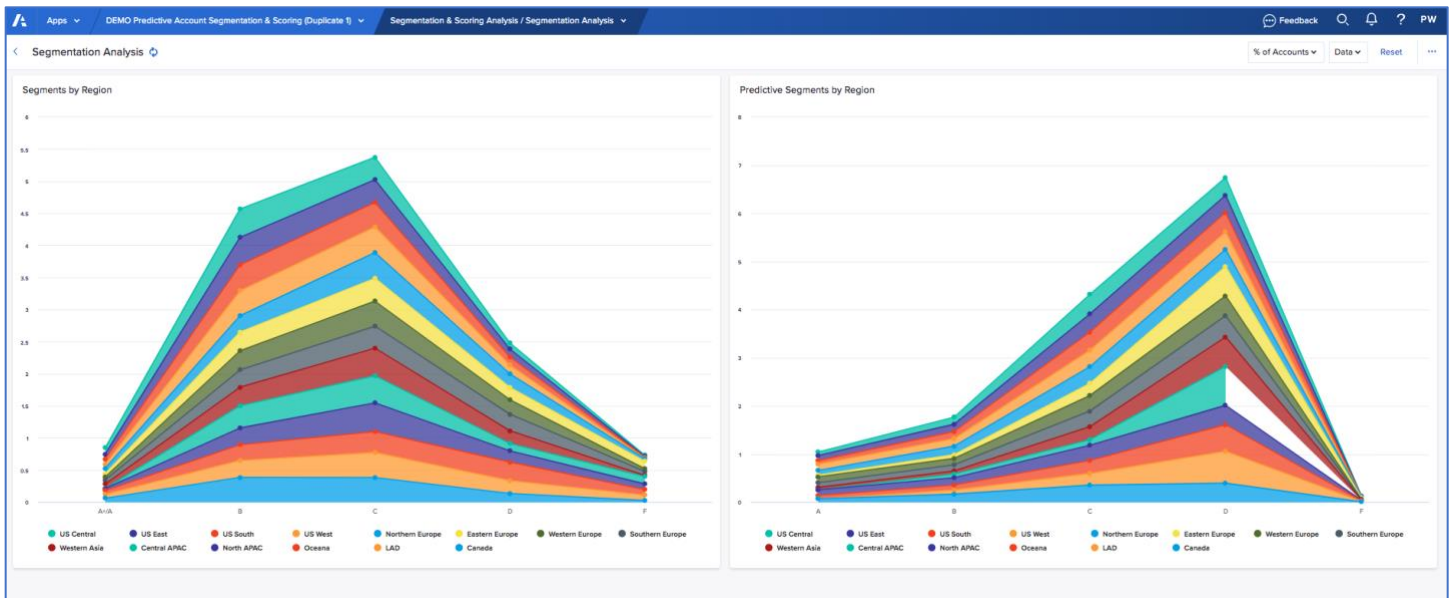
This is another side-by-side comparison of the number of Accounts by Region for each segment.

The left side represents Anaplan's model segments, the right side represents the predictive model's segments.

Different metrics can be selected at the top of the page, e.g., compare by % of accounts, total points, or average points for further analysis. This comparison helps to identify segments to target for downstream processes, e.g., Territory Planning.

ACCOUNT ANALYSIS AND OVERRIDES

Account Analysis → **Account Analysis & Overrides**

In this dashboard, CMO and Sales Leaders view and compare scores and segment ranks holistically at the account level.

- **Suggested Account Review** in the Additional Insights panel allows you to quickly see all accounts with score disparity. (The disparity amount value is configurable within the app.)

- The **Indicators & Intents** insight widget provides a view across all accounts for all intents. (Seen at the lower third of the page.)

You can filter by region, sub-region, and industry or sub-industry, and also rank or score ranges to narrow down the list of accounts.

Override account segments by checking the "Override?" Boolean check-box for the particular account and selecting the new segment in the "Override Segment" column. Drill into account detail (on the next screen) and use account-level insights.

Final Score is anything that's been overridden or it's the AI score if there is no override. (Final Score can also be configured differently, if the customer desires.)

ACCOUNT DETAIL

Account Analysis → **Account Detail**

Account Detail — OMAHA TRACK, INC

Account Name: OMAHA TRACK, INC
Account Industry: Retail
Account Segment: B
Predictive Rank: D

Account Detail

	Account	Industry	Sales Points	Account Segment	Predictive Rank	Predictive Points	Override?	Override Segment	Final Score	Sub-Region	Region	Main Industry
	OMAHA TRACK, I...	Retail	67.86 pts	B	D	28 pts	☑	B	B	Plains	US Central	Retail

Account Attribute Scores

	Value	Percentile	Numeric Band Dimension	Qualitative Band	Numeric Score	Weight	Weighted Score
Prior Year Spend	-	NaN			-	-	-
Potential Spend	-	1%	0 - 20%		10 pts	14%	1 pts
Tenure	35	NaN			-	-	-
Market Share	0.0001126	50%	25 - 60%		65 pts	21%	14 pts
Employee Count	350	61%	50 - 70%		75 pts	36%	27 pts
Quantitative			0 - 20%			71%	42 pts
Industry	-	2%		Retail	90 pts	29%	26 pts
Qualitative				Retail		29%	26 pts
All Attribute Types			0 - 20%	Retail		100%	68 pts

Predictive Intents & Lift

	Used?	Lift ↓	Positive Coverage (customer successes)	House List Coverage
Mintigo - Sub Industry	☐	3.6	148.8%	137.1%
Software Suite: Microsoft Cloud	☑	1.4	83.49%	57.95%
Strategic Planning Positions	☑	1.3	99.07%	77.71%
Cloud Technology	☑	1.2	99.07%	85.98%
Mintigo - Number of Employees	☐	1.1	99.69%	96.05%
Years in Business	☐	1.1	97.82%	91.1%
Mintigo - Annual Revenue	☐	1.0	96.88%	90.82%
Mintigo - Company State	☐	0.8	90.28%	78.15%

Account Scores

(Bar chart: Sales Points ≈ 68, Predictive Points ≈ 28)

Here's where individual account knowledge and discretion comes into play. In the dashboard, review the attribution weighting used for the Anaplan score in the "Weighted Sales Scores" table on the left and compare that to the "Predictive Intents and Lift" factors on the right that are used for scoring by the Predictive AI Engine for individual accounts.

Do I, based on personal knowledge and recent activity with the account, override the original segment with the Predictive AI Engine's segment (rank)?

Do I leave the segment score as is?

Do I change the segment to something different from both scores, based on weighting, intents, and personal knowledge?

PREDICTIVE SCORING AND ATTRIBUTE RECOMMENDATIONS

Segmentation & Scoring Analysis --> **Predictive Scoring & Attribute Recommendations**

< Predictive Scoring & Attribute Recommendations ↻ ⤴

Predictive Segment Attribution Recommendations

Predictive Indicators & Intents ›
Search and Filter Predictive Intents

Firmographic Indicators

Recommended Firmographic Indicators

	Category	Old Category	Description	Value	Lift	Positives Coverage	House List Coverage	Account Count
10M - 50M	Firmographics	Firmo	The income that a company generates over the course of one ye...	10M - 50M	1.0	25.86%	25.06%	3,392
50 to 200	Firmographics	Firmo	The number of people employed by a company.	50 to 200	0.8	19.63%	23.14%	3,168
200 to 500	Firmographics	Firmo	The number of people employed by a company.	200 to 500	1.1	17.13%	15.03%	2,046
1,000 to 5,000	Firmographics	Firmo	The number of people employed by a company.	1,000 to 5,000	1.9	20.87%	10.72%	1,469
More Than 1B	Firmographics	Firmo	The income that a company generates over the course of one ye...	More Than 1B	2.6	25.23%	9.659%	1,399
50M - 100M	Firmographics	Firmo	The income that a company generates over the course of one ye...	50M - 100M	1.1	9.657%	9.059%	1,259
200M - 1B	Firmographics	Firmo	The income that a company generates over the course of one ye...	200M - 1B	1.7	15.26%	8.852%	1,206
500 to 1,000	Firmographics	Firmo	The number of people employed by a company.	500 to 1,000	1.9	13.08%	7.05%	952
More Than 10,000	Firmographics	Firmo	The number of people employed by a company.	More Than 10,000	2.3	14.64%	6.264%	905

Top Indicators & Intents

Human Resources Indicators

Human Resources Indicators

	Category	Description	Value	Lift	Positives Coverage	House List Coverage	Account Intents Count	Mintigo Recommended
Business Intelligence Positions	Human Resources	Has positions such as Business Intelligence Architect and Business Intelligence Developer.	Business Intelligence Positions	1.7	81%	47.25%	6,468	☐
Hiring SaaS Positions	Human Resources	Hiring for positions in areas such as software as a service (SaaS) architecture and SaaS pro...	Hiring SaaS Positions	2.2	83.49%	38.54%	5,335	☐
Hiring Agile Positions	Human Resources	Hiring for individuals with experience in areas such as extreme programming and feature-dr...	Hiring Agile Positions	2.0	82.87%	41.76%	5,760	☐
Hiring a Large Number of Employees	Human Resources	Company has hired more then 1000 employees over the past year.	Hiring a Large Number of Empl...	3.4	11.53%	3.354%	479	☑
Cloud Positions	Human Resources	Has positions such as Cloud Services Administrator and Vmware System Administrator.	Cloud Positions	2.7	75.39%	28.34%	3,940	☑
IT System Positions	Human Resources	Has positions such as IT System Analyst and IT System Administrator.	IT System Positions	1.5	93.46%	62.69%	8,504	☑
Hiring ETL Positions	Human Resources	Hiring for experience with Extract, Transform, Load (ETL) in areas such as database manag...	Hiring ETL Positions	2.2	67.29%	30.38%	4,210	☐

Predictive model components based on the ideal customer profile pre-determined by the Predictive AI Engine are displayed in this dashboard. Analyze buying intents to change quantitative attribute weighting. Firmographic data used for segmentation is displayed on the top along with the number of accounts that fall within each category. Buying intents with lift factors used in segmentation scoring and the number of accounts attributed to each intent are displayed within the applicable categories in the dashboard.

- Add additional segment attributes and/or change weights based on top ideal customer profile (ICP) Indicators and buying signals, where applicable within the Anaplan Model.

    - The Anaplan Model recalculates automatically with the suggested changes.

For example, geographic firmographic data was used by the Predictive model in segmentation, but geography was not considered by the Anaplan model as a part of scoring accounts.
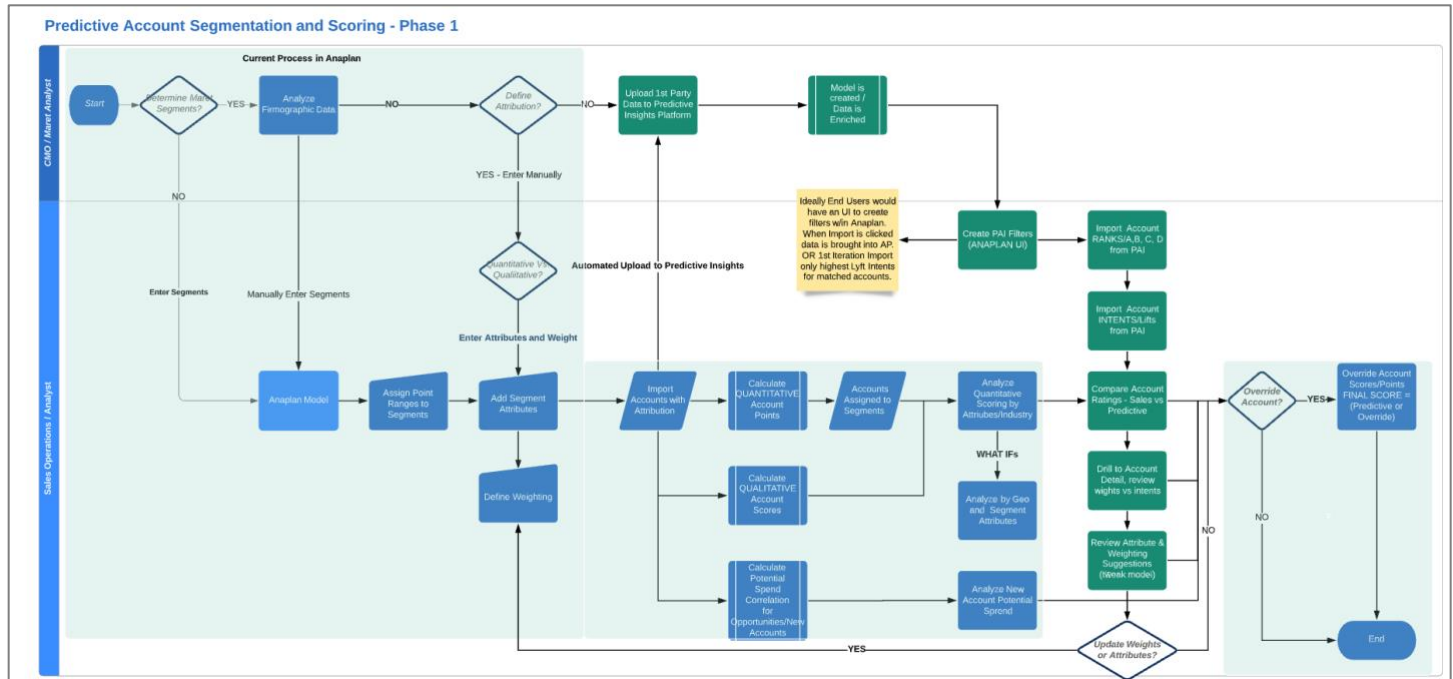
The new Predictive Account Segmentation and Scoring application combines planning and "what-if" capabilities with AI insights. This allows CMOs and sales ops to perform analysis using intelligent insights as well as to retain the ability to apply "tribal knowledge" and specific company experience for segmentation and individual accounts.

MODEL AND INTEGRATION OVERVIEW

High-level processes and integration steps follow below.

PROCESS FLOW AND STEPS

Existing model processes are represented in blue and the new predictive processes are represented in green.

Predictive Account Segmentation and Scoring - Phase 1

ANAPLAN MODEL

The Anaplan Model used as the basis for the Predictive Account Segmentation and Scoring model was downloaded from the App Hub. This model includes actual processes for planning and modeling segmentation, and for scoring. The model also contains "what-if" analysis and the ability to model Potential Spend (by account) based on several calculations: Industry Average, Potential Spend Assumption, % Growth Assumption, and a Correlation Calculation. Potential Spend overrides can also be performed and spend calculations can vary across accounts. Potential Spend is also useful for capacity and territory planning. When potential amount values are associated to accounts, this can feed directly into additional planning solutions along with number of accounts, industry, and geographic information. Manual Overrides to account scores can be easily performed. Insight based on Planning and Predictive AI metrics and buying indicators help CMO/Sales Ops to determine final scores. Accounts and their Final Scores for A, A + B, and C segments are used for Sales Capacity and Territory Planning.

Processes are included to clear data from the model, populate lists, and set up user access. However, you'll likely want to use the Account and AI data included for Demo.

We recommend using existing Demo data because there are many accounts (~14K) that include metrics such as Prior Year Spend, Tenure, Market Share, Employee Count, etc., used for attribute weighting, which are used to calculate account scores. Enriched Account data was imported from an actual Predictive Insights Demo Model and massaged. Weighting is used in the overall calculation of the Anaplan Score across attributes. Predictive AI data associated with

each account, such as account rank, score (number of points), buying indicators along with lift, and lift calculation metrics, are also included in the model and used in various dashboards.

MODEL SETUP STEPS: ADD/MODIFY SEGMENTS, DEFINE/MODIFY ATTRIBUTES AND WEIGHTING

Segments are setup with rank names, A, B, C, D, and F which correspond to ranking names provided by the predictive model (Predictive Insights). Predictive Insights ranks are set and do not change; the same ranking is used across all client AI Models. Changes to the Anaplan Segment names can be easily updated if needed. Originally, we had three segments: Key Accounts, Enterprise, and Mid-Market. Two additional segments were added, and names were changed to mimic the AI segment clusters for reporting and dashboards.

Steps for setting up segmentation and scoring are as follows:

- Add, remove, or modify **segments**. Change your segment names (if desired) and update each segment's point range.
- Add, delete, or modify **quantitative attributes**. If doing so, you'll need to import new metric values.
  a. For example, if you have data for Market Cap, add that as a new Quantitative Attribute, add to the Accounts (A4) list (if not there), add new mapping in the "Update Attribute Data" import action by finding the action in the "actions" tab and edit the action so that your new attribute is mapped appropriately. Add the attribute to any other modules where it may be used for calculation, e.g., Account Attribute Calculations.
- **Update Account List**: Clear and Configure dashboard. This process deletes and imports attribute data into the Account (A4) list. Perform this step ONLY if using new Account Data for implementation or customized demo.
- Run **Update Attribute Data:** This process imports metrics as text data in the Account Attribute Dimensionalization module.
- **Update Active Account Subset:** If needed, include a column to update the Account list subset, which indicates if an account is active (customer) or not (new). There's a formula in the Active Account list property that changes the Boolean to true if LY Spend is greater than 0. You can export the list and re-import after populating the sub-set using this logic or your own logic if you don't have actual account data. The subset is used in calculating the potential spend correlation.
- Enter the point value in the **Points Threshold Filter**.
  a. This is the disparity value between calculated Anaplan points and AI points that is used for filtering the Suggested Account Review list in the Account Analysis and Overrides dashboard (NUX).

Anaplan model set up screen

Segmentation & Scoring Setup

1. Add or remove segments. 2. Rename segments based on your business. 3. Assign point ranges for each segment calculation.

▾ **Define Segments**

	Name of Segment	Min Point Value	Max Point Value
A+/A	A+/A	80 pts	100 pts
B	B	60 pts	80 pts
C	C	40 pts	60 pts
D	D	20 pts	40 pts
F	F	0 pts	20 pts
Commercial Accounts			
All Accounts			

[Add Segment] [Delete Segment]

When adding an attribute, enter numerical account data under the Quantitative parent and string data under the Qualitative parent.

Weight is based on all segment factors across segmentation factor types.

Select "Rank Active Accounts Only" to exclude Active account from that metric. If this option is selected, scoring from that factor will not be included in the final scoring. It will not make a positive or negative change to the final score. Factor weights are automatically adjusted to be proportional.

▾ **Define Attributes**

	Weight	Rank Active Accounts Only
Prior Year Spend	10%	☑
Potential Spend	10%	☐
Tenure	20%	☑
Market Share	15%	☐
Employee Count	25%	☐
Quantitative	**80%**	
Industry	20%	☐
Qualitative	**20%**	
All Attribute Types	**100%**	

[Update Attribute Data]

[Update Active Account Subset] When accounts are added to the model, the active subset must be updated for correlations to calculate properly.

Define the number of points between Anaplan & AI Predictive scores. The resulting list will be used as a filter for the list of suggested accounts to be reviewed.

▾ **Points Threshold Filter**

Update attribute data

Run this process if adding new attributes. You'll need to update the mapping in this process first if names are modified or new attributes added.

QUANTITATIVE ANALYSIS DASHBOARD
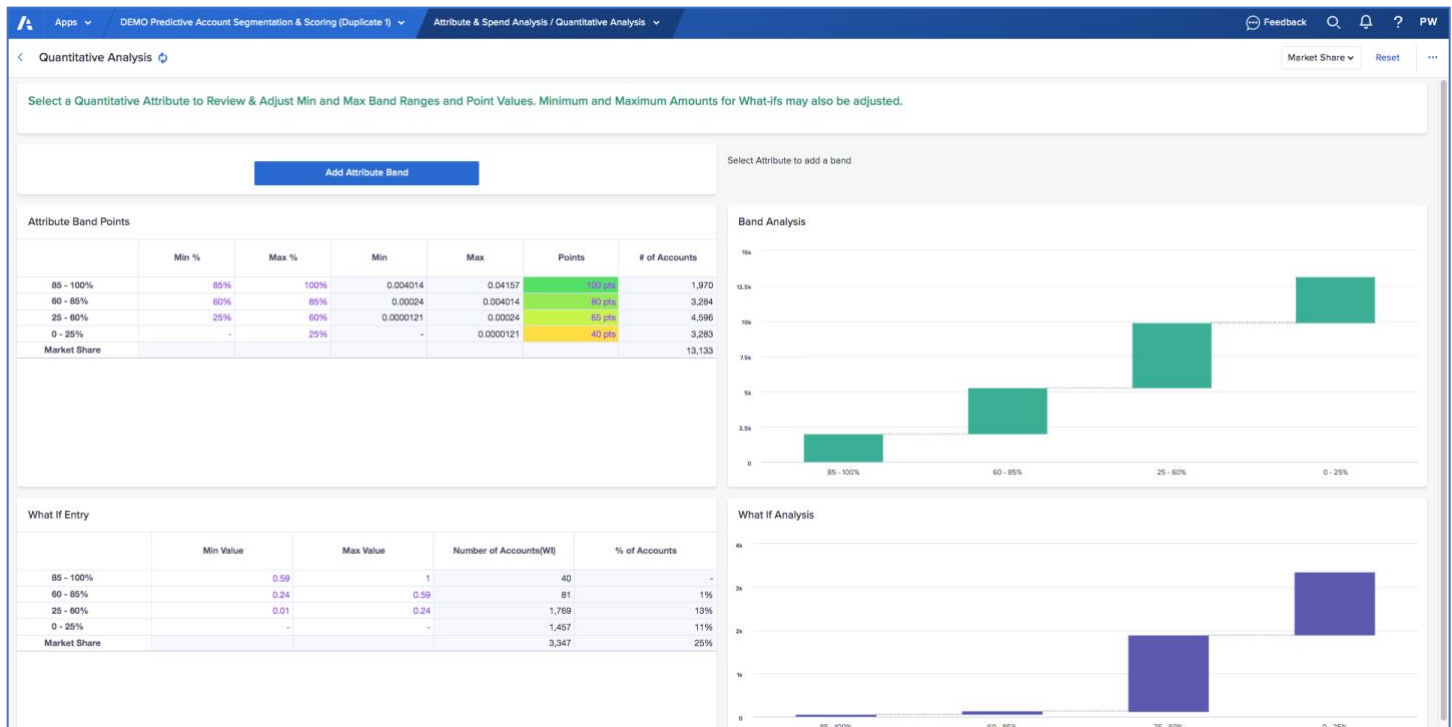
Define the point ranges for each quantitative attribute if not set up already. Add or remove bands, click the Add Attribute Band action, and modify the minimum and maximum ranges.

Adjust the number of points allotted to each band. Changing min and max ranges and number of points directly affects account scoring.

Band Chart Set up, "What-If "Chart Set up, Potential Spend Calc, Potential Spend Correlation, Define Qualitative, Set up Attribute Bands

IMPORT ACCOUNT DATA

Customer data is either fed directly to Predictive Insights, modeled, enriched, tested, and scored. Or it is imported into Anaplan and pushed into Predictive Insights via direct integration. (Integration is not yet available, but we expect something by the end of 2019. We also expect to have automated integration for updating account scores, intents, and buying stages.)

If pushed directly into the Predictive AI Engine from Anaplan (recommended approach), we will be able to retain the unique Anaplan code and match this during re-import. Data will still need to be modeled, enriched, and scored within Predictive Insights before re-importing back to the Anaplan Model. See basic Predictive Insights Set-up Steps below.

The advantage to using the push from Anaplan is that you won't need to massage the data before re-importing. Firmographic metrics are easily retained and mapping to create a geo hierarchy won't be needed.

We are working on integrations between Anaplan and Predictive Insights. Initial integration actions to be included in the demo model and available for customers are:

- Account Push from Anaplan to Predictive Insights: Positive List (Customers) and House List (Prospects).
- Industry Pull from Predictive Insights: Populates Industry List in Anaplan with relevant account industries/sub-industries.
- Account Indicators: Populates Predictive Insights Indicators Lists and Modules.

- Account Attributes: Updates Account list and Modules with appended data from Predictive Insights. Includes additional firmographics, including Account Annual Revenue, Employee Count, Industry, and Geo information; Indicators and Intents with lifts and lift coverages.

CALCULATE ACCOUNT SCORES

The process remains as is for the Anaplan planning piece. You manually add segments, quantitative and qualitative attributes, and weighting—see above. If using the demo data, you'll likely leave these metrics as is. However, you can update any of these factors if some other quantitative metric and different weighting resonates more closely with the prospect.

After the account data is imported and you run the Update Attribute Data process, scores are calculated automatically.

POTENTIAL SPEND CALCULATION

To setup the Potential Spend calculation(s) you will need to add the Spend Method (Set Potential Spend By) in the Potential Spend Analysis dashboard or module. The % Growth Assumption is the easiest to set up. Add the % Growth Value, e.g., 20%, and the Growth Amount, e.g., 10,000, or some other value. You can mix the calculation type based on some factor, e.g., industry, or geo.

You can also override by selecting the Override "Set Potential Spend By" type and entering a value in the Manual Override Value field, or by entering a percentage in the Manual Override % Growth.

POTENTIAL SPEND ANALYSIS & OVERRIDE CALCLUATIONS & DASHBOARD

Update the newly calculated potential spend values for accounts by clicking the "Post Potential Spend to Account" action. This updates the Potential Spend values in the Account List.
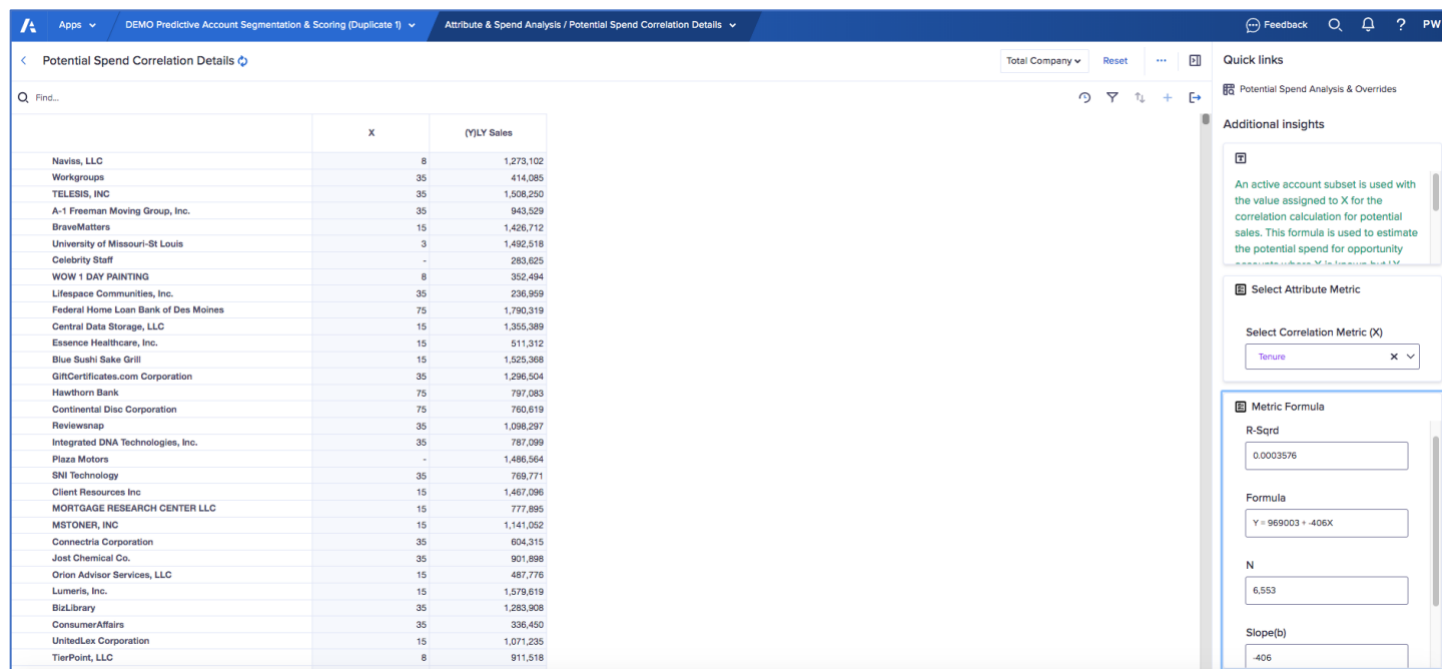
POTENTIAL SPEND CORRELATION DETAILS

Correlation Details explains how the potential spend and other quantitative attributes are calculated.

Select the Quantitative Attribute Type "Metric" in the Additional Insights panel to view the account data values and the corresponding calculation information.

The screen shot below details the Tenure calculation.

The Correlation Metric type selected corresponds to the quantitative value you want to correlate potential "Spend By." Basically, it's the best indicator based on the KPIs and data you have for the accounts.

> Calculations are performed against Active Accounts only.
>
> Prior Year Spend
>
> > • Not modified by any formula, X = 1
>
> Potential Spend
>
> > • Is calculated when in the Potential Spend Analysis Dashboard. Applies the % Growth Assumption amount entered against Prior Year's Spend amount.
>
> Tenure
>
> Market Share
>
> Employee Count

QUALITATIVE ATTRIBUTE ANALYSIS DASHBOARD

Attribute and Spend Analysis → Qualitative Attribute Analysis

‹ Qualitative Attribute Analysis ⟳   Qualitative ⌄ Reset … ⊡

Quick links

🔍 Find…   ⟲ ▽ ↕ + ⊡

⊟ Quantitative Analysis
⊟ Potential Spend Analysis & Overrides
⊟ Segmentation Analysis

	Points	# Accounts	% Accounts	# Active Accounts	# Opportunity Accounts	LY Sales	% LY Sales	Avg. LY Sales	Potential Sales	Market Share
Hospital and Health Care	100 pts	521	4%	254	267	223,074,659	4%	428,166	267,689,591	1.00
Computer Software	90 pts	4,009	31%	1,986	2,023	1,921,367,221	31%	479,263	2,305,640,665	1.00
Construction	90 pts	169	1%	81	88	72,959,205	1%	431,711	87,551,046	1.00
Food Production	90 pts	54	-	26	28	25,584,019	-	473,778	30,700,823	1.00
Retail	90 pts	309	2%	147	162	137,812,766	2%	445,996	165,375,319	1.00
Banking	80 pts	142	1%	68	74	66,481,727	1%	468,181	79,778,073	1.00
Financial Services	80 pts	441	3%	224	217	215,934,803	3%	489,648	259,121,764	1.00
Higher Education	80 pts	277	2%	146	131	137,655,843	2%	496,953	165,187,012	1.00
Insurance	80 pts	175	1%	90	85	88,054,446	1%	503,168	105,665,335	1.00
Wholesale	80 pts	166	1%	80	86	77,855,446	1%	469,009	93,426,535	1.00
Automotive	70 pts	121	1%	62	59	53,910,213	1%	445,539	64,692,256	1.00
Chemicals	70 pts	81	1%	38	43	35,910,278	1%	443,337	43,092,334	1.00
Information Technology and Services	70 pts	784	6%	396	388	386,560,845	6%	493,062	463,873,014	1.00
Machinery	70 pts	110	1%	64	46	60,317,089	1%	548,337	72,380,507	1.00
Oil and Energy	70 pts	42	-	23	19	19,873,855	-	473,187	23,848,626	1.00
Real Estate	70 pts	139	1%	64	75	57,636,851	1%	414,654	69,164,221	1.00
Transportation/Trucking/Railroad	70 pts	80	1%	33	47	24,634,204	-	307,928	29,561,045	1.00
Computer Hardware	60 pts	374	3%	160	214	145,272,194	2%	388,428	174,326,633	1.00
Government Administration	60 pts	98	1%	50	48	48,851,093	1%	498,481	58,621,312	1.00
Management Consulting	60 pts	324	2%	170	154	161,462,511	3%	498,341	193,755,013	1.00
Manufacturing	60 pts	80	1%	44	36	42,396,184	1%	529,952	50,875,421	1.00
Marketing and Advertising	60 pts	701	5%	358	343	347,628,535	6%	495,904	417,154,242	1.00
Metals and Mining	60 pts	32	-	16	16	19,337,815	-	604,307	23,205,378	1.00
Nonprofit Organization Management	60 pts	167	1%	82	85	76,791,755	1%	459,831	92,150,106	1.00
Pharmaceuticals	60 pts	74	1%	34	40	31,360,020	1%	423,784	37,632,024	1.00
Restaurants	60 pts	82	1%	47	35	43,406,136	1%	529,343	52,087,363	1.00
Telecommunications	60 pts	218	2%	109	109	103,757,324	2%	475,951	124,508,789	1.00
Utilities	60 pts	38	-	19	19	18,751,311	-	493,456	22,501,573	1.00
Apparel and Fashion	50 pts	73	1%	38	35	41,729,915	1%	571,643	50,075,898	1.00
Aviation and Aerospace	50 pts	28	-	19	9	16,917,276	-	604,188	20,300,731	1.00
Building Materials	50 pts	29	-	14	15	14,732,842	-	508,029	17,679,410	1.00
Consumer Goods	50 pts	50	-	24	26	23,971,441	-	479,429	28,765,729	1.00
Education Management	50 pts	144	1%	72	72	74,072,117	1%	514,390	88,886,540	1.00
Electrical/Electronic Manufacturing	50 pts	63	-	30	33	27,792,745	-	441,155	33,351,294	1.00
Food and Beverages	50 pts	39	-	21	18	17,357,411	-	445,062	20,828,893	1.00
Hospitality	50 pts	78	1%	34	44	35,370,164	1%	453,464	42,444,197	1.00

Review metrics across accounts by industry to narrow down commonality for highest potential. If the grid is blank, select "Qualitative" in the attribute type drop-down.

PLATFORM PREDICTIVE MODEL SET UP

See the Predictive Insights Modeling Guide for more detailed information. What follows is a simple setup description.

As mentioned above, it's suggested that data be pushed into Predictive Insights from the Anaplan model. Accounts roll up the Geo hierarchy configured within the Predictive Account Segmentation and Scoring model. Customer Accounts (wins) along with prospects are imported into Anaplan along with any firmographic attributes. Be sure to populate the Account (L4) Code with a unique identifier.

In order to score accounts, you need to create a model in Predictive Insights using the newly imported account data. Manual steps to accomplish this follow.

Set up your Customer Predictive Insights Account: Create a new password, if needed, and log into your account.

Create a New Market: If this is a new Predictive Insights account, you'll be asked to create a Market (name), which you create the model for.

Data: Account data should include fields to identify the account as closed/won (Positive Set) or new prospect (House List). It's best to have separate files for each source type. This is known as **Conversion** data. Also include any other Interaction data if possible. For example, product(s) purchase history, or other behavioral data. During manual import, you'll need to set up mapping from the source (export) to the target fields. When data is imported into Predictive Insights, it is validated, matched to Predictive Insights existing account data, and appended with all data that Predictive Insights has for that account record.

Create Model: Select the model type—either single product or multiple products. A simple wizard walks you through this process. Machine Learning Algorithms are applied to accounts to identify top Intents based on third-party online digital footprint and are appended to account and opportunity data. Once indicators and intents are identified, additional

optimization is performed via propensity modeling that applies additional machine learning Logistic Regression and Gradient Boosted Decision Trees. Final results are used to score and rank accounts. Once accounts are scored, account information is pulled back into the Anaplan model and used for analysis.

PUTTING IT ALL TOGETHER

After reviewing Quantitative and Qualitative results, adjusting weighting and min/max scoring, and analyzing Potential Spend output and correlation, Sales Ops/CMO/Marketing Analysts proceed to further analysis comparing Planning Metrics to Predictive AI Engine's Metrics. (Predictive Account Segmentation and Scoring: New Analysis Dashboards.)

Accounts are reviewed and segments/scores are overridden based on internal knowledge, planning factors, and AI Fit Indicators and Buying Intents to produce more accurate results. This leads to a more informed, better aligned overall strategy and targeted set of accounts.