

Using Customer Stratification

Robert:

What are you doing?

Andrew:

I'm trying to think through my accounts, and figure out who my best accounts are.

Robert:

I think I know something that can make that easier, have you heard of Customer Stratification?

Andrew:

Yeah, I saw a webcast on it! That's what I'm trying to do.

Robert:

BisTrack 6.0 and later has a tool for just that! Let me show it to you!

Pick a topic and we'll give you the run-down!

Topics

- Using Customer Stratification
- Customer Options
- Show Us What You Know

Select an option above.

Using Customer Stratification

In BisTrack 6.0 and higher, locate the Customer Stratification function under Business Intelligence in the Navigation Pane.

Use the dropdown to choose the metric that you want to display grade information for.

You can also select the weighting to use.

Enter additional details to narrow your search and press Go.

You can see the details like their trend, or Grade over various time periods in the results section.

The detail view shows you every metric and customer combination in the system.

The Summary Tab gives you a summary of customers' overall grade.

The breakdown of the metrics used to calculate the overall grade displays on the bottom part of the window.

This expansion of Customer Stratification gives an easier way to group and analyze your customers.

Customer Stratification Customer Options

Under Customer properties you can adjust the weighting used to assess a customer, or you can exclude the customer entirely from stratification.

View the video content.

In BisTrack 6.0 and higher Customer properties include two options related to Customer Stratification.

To keep the account removed from the Customer Stratification process entirely, set the Exclude from customer stratification option to Yes.

If you have multiple weightings set up in system manager, you can select which one applies to an account using the Customer stratification weighting option.

These options let you have control over how specific accounts interact with the Customer Stratification feature.

Show Us What You Know

Question 1

Select an answer and press Confirm.

What does the Summary tab use to generate the overall grade?

- The average of each individual grade category
- The customer's trend information
- The selected weighting which is set up by your administrator CORRECT

Select an option and press Confirm.

ANSWER: BisTrack generates the Summary Grade based on the selected Weighting set up by your administrator.

Question 2

Select the best option and press Confirm to submit your answer.

What are some of the benefits of Using Customer Stratification?

- See at-a-glance ratings of customers
- Have customer trends pointed out to you
- Better visibility for go-forward strategies.
- All of the Above CORRECT
- A and C

Select an answer, and press Confirm

ANSWER: Customer Stratification assists in all these ways.

Assessment Result

Well done, you passed the course!

You must have missed something. Press Home to review the course, and select Show Us What You Know when you're ready to try the quiz again.

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