Customer Stratification Setup

Andrew:
I keep trying to run the new Customer Stratification, but no results come up… What am I missing?

Robert:
Customer Stratification requires some setup to run the function.
Make sure to enable user permissions, set the metrics, and their weights for establishing the customer grades.
Pick a listed topic to learn how to configure it in BisTrack 6.0 or higher.

Topics

- Customer Stratification Permissions
- Customer Stratification Metric Views
- Show Us What You Know

Select an option above.

Customer Stratification Permissions

Customer Stratification Metric Maintenance - Enable this permission to allow a user to edit metrics.

Customer Stratification - this permission allows a user to access Customer Stratification the Business Intelligence view.
Using Customer Stratification in BisTrack 6.0 or higher requires you to set a couple user permissions in System Manager for those who manage or use this feature.

Under System Manager Views, enable the Customer Stratification Metric Maintenance permission.
This permission allows you to view and edit the Customer Stratification Metrics and Customer Stratification Weighting details in System Manager.

Return to permissions and find the Customer Stratification permission under BisTrack Views. Then enable it.
The user can now see the Customer Stratification function under the Business Intelligence section of the Navigation Pane of the Home tab.

Customer Stratification Metric Views

Use system manger to set up metrics to grade customers by.
You can create weightings for BisTrack to generate summary grades for accounts.
Read More…
Find these options in the System Manager under Customers.
- Customer Stratification Metrics
- Customer Stratification Weighting

In BisTrack 6.0 and higher you must set metrics for the Customer Stratification function to run.
These settings establish how BisTrack grades the customers included in the report.
Use System Manager to manually set these parameters.
Select Customers, and then Customer Stratification Metrics.
Add a new entry by right clicking and selecting New or double-click an existing metric to edit its properties.

The Metric Type influences the field BisTrack uses to generate the rating.

Limit the Division, Branches, and Customer type or groups as needed.
You may also exclude specific Branches or Customers that you do not want to consider for this metric.

Enter the boundaries for each grade, and select OK to save.
You can define multiple metrics for the same metric type, giving each its own set of criteria.
If you want BisTrack to Set Customer Stratification Metric Boundaries automatically, use the function on the Tools tab.
When selected, BisTrack analyzes each metric and calculates the boundaries using a standard deviation formula.
BisTrack uses weighting to combine the grades of existing metrics into a consolidated customer stratification grade.
Select Customer Stratification weighting under Customer to view and edit the weightings.
Right click and select New to add a new weighting, or double-click to open an existing one.
Adjust the weighting in the last column to reflect how you want each metric to contribute to the consolidated grade.

The values must add up to 100.
Press OK to save.
Adjusting these metrics and weightings influences the results when users run the Customer Stratification function.

Show Us What You Know

Question 1

With Customer Stratification permission enabled, where can a user access the function?

Select an answer and press confirm.

- Under Business Intelligence in the Navigation Pane   CORRECT

- In System Manager under the Customer category

- Under Views in the Navigation Pane

- In the Tools Section of the Navigation Bar

Select an answer and press Confirm.

ANSWER: You can find the Customer Stratification function under Business Intelligence in the Navigation Pane.

Question 2

BisTrack calculates the Summary Grade by taking the average of all Metrics for the given Customer.

True or False?

Select True or False, and then press Confirm.

- False   CORRECT

- True

Select True or False. Then press Confirm.

Answer: FALSE.

BisTrack uses the Weighting calculation set in System Manager under Customer Stratification Metric Maintenance.

It is NOT the average of all metrics.

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