HOW TO SPOT WHICH CUSTOMERS HAVE REDUCED SPEND

This guide will show you how to use sales-i's Campaigns features to find which customers' spend shrunk by 10% or more over the last 3 months.

Note: Campaigns can only be created by power users. However, anyone with access can run the results.

From the top navigation, click Campaigns. $\mathbf{01}$



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02 Click the green Add New Campaign button at the bottom left of the screen.

03 Select the **Variance** filter and drag and drop into the large box on the right.







In the new window that appears click Create New enquiry.

05 Click Search Filter in the top left of the window, this will allow you to adjust many filters.





06 Select the **3 months** date button, then tick Show Complete Months* and then click the green **save** button in the bottom right hand corner.

*When ticked the Show Complete Months option excludes the current calendar month.

Select the **Customer** bubble, which 07 can be found in the Customer Analysis section.



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08 Now name your enquiry. For this example we'll use 'customers who have purchased in the last 3 months vs. the previous 3 months - rolling & complete'. Click **Save**.

> *Please note: At this point you're saving this enquiry using all data from the time frame selected.



The drop-down menus act as a series of questions that will exclude customers from the recently saved enquiry based on your answers.

Options used for this specific campaign: a. Shrinking

- b. More Than
- c. Percentage
- d. Enter 10 into the last box.
- Then press finished.





10 Press the green **Generate** button in the top right of the window.*

*Please note: This campaign uses a single filter, other campaigns may use more than one filter. This can be achieved using similar steps as detailed above

11 At this stage a black box will appear warning you that you will not be able to change your Campaign once you press Yes.

Click Yes.



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12 Name this overall campaign 'customers who have purchased in the last 3 months vs. the previous 3 months shrinking more than 10% sales value rolling & complete'.

Using the traffic light system, give your campaign a colour of priority.



14 When you're ready to move on, click **finished**.

This section is editable for name, priority and user selection.

Optional: The tick box to the right of the user(s) selected to access the campaign is an optional email notification reminder.

Under **Notification Schedule**, select the frequency you would like an email reminder to run the campaign to be sent out.

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Next, select the users you wish to access the campaign results.

Using the grey arrow next to **All Users** folder, will open up the list of users.

Select the box next to **All Users** if you wish to allow everybody to access the campaign*

*If used, **Groups** will assign access to the users included in the relevant group(s).

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15 To view the results of this campaign, click on its title in the menu on the left.*

*Please note: Only the Power user can see the date processed tab and associated line graph.

Select **Date Processed** to see the results.

16 You will now see a list of companies. The **Variance** column shows how much their spend has fallen by a percentage over the last 3 months.*

Range 1 is the closest date range to the current date.

Range 2 is the furthest date range from the current date.

*Please note: Clicking the header of a column will sort by ascending or descending order.

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