



PredictX for Retail

Travis Perkins Reinvents Customer Relationship Management

The Challenge

New technology and an over saturation in communication means that Sales and Marketing is transforming to be less about the hard sell and more about the relationship you have with your customers. These relationships are not based on social connections but rather the connections you build the second a customer swipes their card - a history of transactions. Customers desire a sales team that understands their needs and targets their services to meet these needs. This can not only improve profits but also improve customer satisfaction and experience.

With over 600 branches and 200 tool hire outlets supplying more than 100,000 product lines to professional tradespeople and self-builders, the Travis Perkins sales team truly had their work cut out for them.

Each of the 140 Sales reps had around 150 clients to manage, yet they stored most customer information in spreadsheets shared by email and an external Customer Relationship Management (CRM) tool. Although the tool was helpful, the reporting was often outdated - delivering insights that were too late to act upon.

In August 2017, Travis Perkins executives started to notice a gap between the customer data they had and the customer data they wanted.

“We wanted to be close to our customer. Before the Customer Hub, the Sales team were making a lot of assumptions about who our customers were and what their needs are,” said Head of Finance Operational, Sales and Supply Chain for Travis Perkins Hemel Morjaria.

Summary

The Customer Hub in action

How does it improve sales?

1. It identifies positive upselling opportunities

- Real-time alerts sent to sales reps
- Informs them when a customer stops purchasing for a while
- Includes past buying history
- Recommends complementary products for upselling.
- Sales reps can immediately view top 150 products

2. It motivates the sales team

A Sales rep used to take half a day accessing the information to prepare for a customer meeting. It is now automated allowing them to focus on their conversation with their customers.

3. It helps executives make better decisions

The Customer Hub started as a tool for Sales, however it soon got rolled out to the Executives. With the data analysis, Executives can now answer fundamental questions, like how they sell as a business and how they train their sales team.



Introducing the Customer Hub

In early September the Customer Hub was born. It was an advanced solution to delivering timely customer insight. Offering a deepdive into each customer within its database- the Customer Hub outlines areas of focus for sales reps. It examines:

- General information surrounding the customer's business
- Current customer needs
- Customer buying history - offering a complete basket analysis.

"The biggest value to Travis Perkins is around the breadth of data they now have at their disposal. It gives them everything they need to know about that customer, without having to collate it from multiple systems," said PredictX Business Analyst Manager and co-creator of the Customer Hub, Andrew White.

The Customer Hub has transformed Travis Perkin's access to data from 50 to 100%. It is currently being used across 85% of the sales team.

"It is all there at our fingertips, from sales trends, to marginal trends and to opportunities of products. Now, we have an accurate 360 degree view," said Morjaria.

What next for the Customer Hub

"We would like to develop a more complex algorithm that does a single product recommendation," said PredictX Business Analyst Aleena Ashary. "The product currently has three widgets containing insight: one based on declining spend, one based on customer type, and another general basket analysis widget. We want to merge all three algorithms into one analysis."

We also aim to provide targeted, real-time notifications that pop up as the Hub opens - informing the sales rep key insights that need quick action, such as a gap in customer communication or declining sales. "We want more action oriented reporting," said Marjoria.

As the data surrounding sales becomes increasingly complex, perhaps this new tool can help sales teams do their best work -selling a product.

✓ Key Insights



"It has allowed us to see our customers in a different light. We are able to segment our customers to review the performance associated with each one. This includes the type of products they buy and what they do as a business. Through this, we can understand their needs more inclusively."

Hemal Morjaria
Head of Finance Operational, Sales and Supply Chain

Travis Perkins

