Amperity
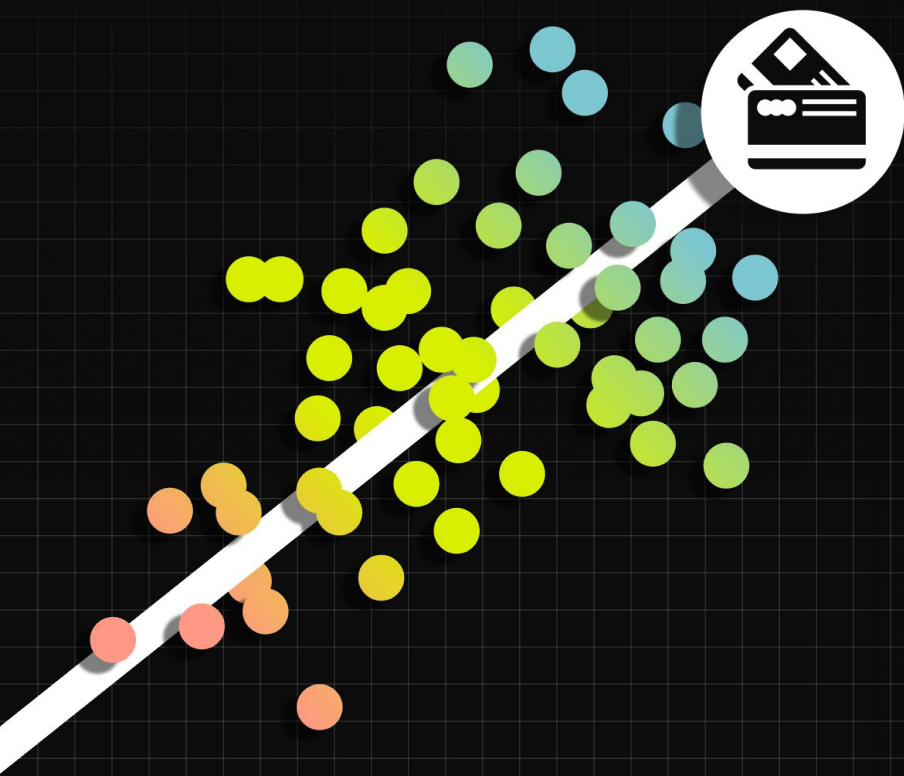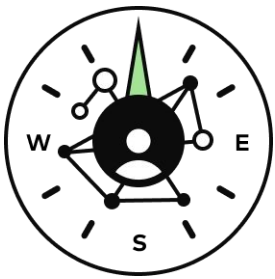
Analytics: Financial Services

Solution Brief

**Three types of analysis to help uncover data-driven insights and supercharge your business**

Let the data lead the way.

Everything you want to know about your customers is in their data: where they are in their lifecycle, if they have the characteristics of a high-value customer, what, when, and where they buy — and when you have access to this knowledge, you can make smarter decisions, market more effectively, and drive brand loyalty.

How Amperity supercharges your analytics

We function as the hub of your customer reporting and analytics infrastructure and help business, analytics, and marketing teams easily access the data they need to make the most informed decisions. Our novel approach to identity resolution unifies your data into one single view of the customer — this provides your whole team with a single source of truth to work from, eliminating silos and giving you the in-depth customer insights needed to deliver relevant experiences.
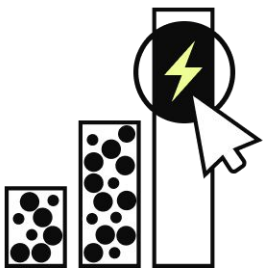
An always-fresh view of your customer means you can make decisions with the most up-to-date information, while we partner with you to identify what data you need to generate reports and supply it to the Business Intelligence (BI) tool of your choice. With Amperity, your analytics team doesn't need to spend hours on data engineering. Instead, they can use their time to analyze data and uncover findings to drive your business forward.

Business Performance

Examine business performance using customer metrics across time periods, customer lifecycle, products, and channels to fuel data-driven decisions and activation.

Questions to Ask

1. What channels are driving the most revenue and engagement?
2. How many of my customers are new? How many are returning?
3. Which customers are the most valuable to my brand? What types of actions are they taking?
4. How much of my revenue is coming from customers I can market to?
5. What products, services or offers are driving more of my revenue/profit?

Marketing Use Cases

Multi-channel activation
If customers who are engaging with your app are more active with your brand, consider targeting non-app users with a campaign to encourage them to download your app

Analysis to Use

Use the *Executive Dashboard* to understand business performance across your customer base and identify trends and opportunities.
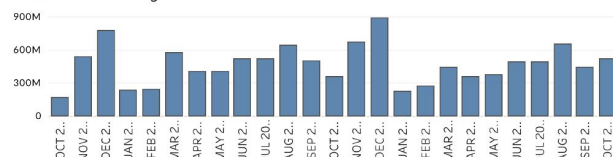
Executive Dashboard

Last Week

30M Household Accounts	$150B Total Deposits	$5000 $/Household Account	5K New Household Accounts	$4500 Avg Account Deposit
+5% YoY	+10% YoY	+3% YoY	+20% YoY	+5% YoY

OCT 2022 to Date

37K Household Accounts	$159M In Deposits	$4300 Avg Deposit/ Household Account	17K New Household Accounts	$4700 Avg Account Deposit
+3% YoY	+2% YoY	+5% YoY	+4% YoY	+3% YoY

2022 Q3 to Date

37M Household Accounts	$166B Total Deposits	$4600 $/Household Account	51K New Household Accounts	$4600 Deposit/Household Account
+15% YoY	+10% YoY	+5% YoY	+25% YoY	+4% YoY

FY2022 to Date

40M Household Accounts	$192B Deposits	$4800 Avg Deposit/Household Account	51K New Household Accounts	$4600 Deposits/Household Account
+15% YoY	+10% YoY	+4% YoY	+20% YoY	+1% YoY

How has **revenue** changed over the L24M?

How have **deposit metrics** changed over the L24M?

Sample figures

Customer Preference

Evaluate the product preferences of your customer base to build more intelligent marketing and customer cultivation strategies.

Questions to Ask

1. What products or services are driving the most revenue and profit?

2. What products or services are most commonly opened or enrolled in with my highest revenue producing product or service?

3. Which products or services are usually opened or enrolled in together?

4. What products or services can we pair that are highly complementary?

Marketing Use Cases

Next best program
Create a next best product or service series by identifying additional services or products that a customer might be interested in based on the actions of similar customers

Analysis to Use

Use the **Basket Analysis** to understand what products are most commonly enrolled in together, how those pairings drive revenue or customer value, and what marketing strategies to develop.

Basket Affinity By Product Category

	Grand Total	CREDIT CARD	CHECKING ACCOUNT	SAVINGS ACCOUNT	HOME MORTGAGE	BOAT MORTGAGE	CAR LOAN	IRA
Grand Total	12,196,272 100.00%	1,185,731 9.72%	1,130,527 9.27%	1,109,073 9.09%	1,000,139 8.20%	988,750 8.11%	968,285 7.94%	956,070 7.84%
CREDIT CARD	1,185,731 100.00%	1,185,731 100.00%	192,314 16.22%	171,004 14.42%	116,174 9.80%	95,343 8.04%	139,326 11.75%	115,296 9.72%
CHECKING ACCOUNT	1,130,527 100.00%	192,314 17.01%	1,130,527 100.00%	140,511 12.43%	103,885 9.19%	94,255 8.34%	118,250 10.46%	136,090 12.04%
SAVINGS ACCOUNT	1,109,073 100.00%	171,004 15.42%	140,511 12.67%	1,109,073 100.00%	92,430 8.33%	98,430 8.87%	111,357 10.04%	106,983 9.65%
HOME MORTGAGE	1,000,139 100.00%	116,174 11.62%	103,885 10.39%	92,430 9.24%	1,000,139 100.00%	56,680 5.67%	80,064 8.01%	70,487 7.05%
BOAT MORTGAGE	988,750 100.00%	95,343 9.64%	94,255 9.53%	98,430 9.95%	56,680 5.73%	988,750 100.00%	63,648 6.44%	62,180 6.29%
CAR LOAN	968,285 100.00%	139,326 14.39%	118,250 12.21%	111,357 11.50%	80,064 8.27%	63,648 6.57%	968,285 100.00%	99,596 10.29%
IRA	956,070 100.00%	115,296 12.06%	136,090 14.23%	106,983 11.19%	70,487 7.37%	62,180 6.50%	99,596 10.42%	956,070 100.00%
ROTH IRA	913,573 100.00%	93,917 10.28%	75,668 8.28%	85,840 9.40%	59,134 6.47%	166,402 18.21%	76,548 8.38%	51,082 5.59%
SAVINGS ACCOUNT	869,855 100.00%	148,058 17.02%	125,235 14.40%	131,663 15.14%	78,006 8.97%	83,144 9.56%	118,044 13.57%	54,221 6.23%
	784,730 100.00%	78,518 10.01%	84,175 10.73%	105,008 13.38%	79,923 10.18%	55,501 7.07%	72,208 9.20%	113,198 14.43%

Fiscal Year (All)

Fiscal Quarter (All)

Fiscal Month (All)

Fiscal Week (All)

Transaction Channel (All)

Age Bucket (All)

Ethnicity (All)

Household Income (All)

*Predicted ... (All)

Sample figures

Customer Lifecycle

Develop a solid point-in-time journey for your customers and use that knowledge to effectively personalize messaging for customers based on what stage they are in their lifecycle. Use this information to better understand conversion rates and optimize the time and type of offer to boost rates.

Questions to Ask

1. At what point in their journey do customers enroll in certain products?

2. How has product adoption changed over time?

3. Where do a majority of my customers sit within their journey?

Marketing Use Cases

Suppressions
Suppress customers who already enrolled in a product from promotion emails

Personalized upsell strategy
Send exclusive product enrollment emails to customers that are at an influential point in their lifecycle and have high enrollment potential

Analyses to Use

A. Use the *Customer Lifecycle Analysis* to know what to do when a customer enrolls in a certain product, how product adoption changes over time, and what actions to take with individual customer segments to encourage future adoption

B. Use the *One-and-Done Analysis* to evaluate your customer base to determine the most opportune time during the customer lifecycle to re-engage with customers and encourage them to enroll in an additional product or service to turn them into repeat customers

Amperity &

Make your data work for you.

With Amperity, you can answer critical questions that amplify your business and decide the best course of action based on data-driven insights.

✉

Get in touch to learn more about how Amperity can take your analytics strategy to the next level.

hello@amperity.com