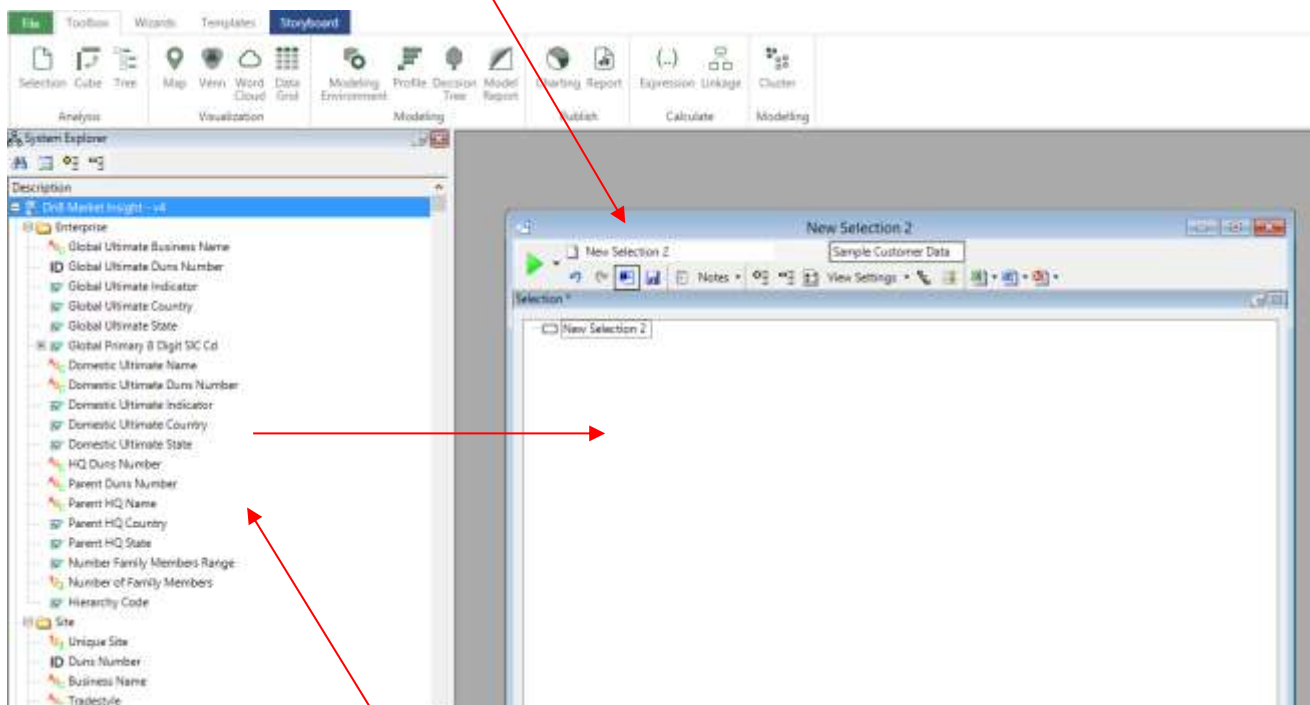


How to Profile Customers vs Prospects

There may be times when you would like to identify customers vs prospects based on a specific selection. This could be useful say if you were trying to determine penetration rate etc.

First start by creating a selection. Double click your selection tab at the top right in your system explorer tab.

This will open a selection window in your workspace area and you can begin to build your criteria.



You can now drag elements from your system explorer tab into your new selection window.

For example for this selection I will use the states of Alabama and Pennsylvania with Primary 4 digit SIC codes of 1521 and 1711 and marketable records.

Start by dragging and dropping the marketability indicator into your selection box in your workspace area. (see below)

Check the box to indicate marketable records.

The screenshot shows a software interface with two main windows. On the left is a 'System Explorer' window with a list of fields. On the right is a 'New Selection 3' configuration window.

System Explorer Fields:

Description	Type
<input checked="" type="checkbox"/> Small Business Indicator	Selector (No
<input checked="" type="checkbox"/> Subsidiary Indicator	Selector (No
<input checked="" type="checkbox"/> Legal Status	Selector (No
<input checked="" type="checkbox"/> Minority Owned Business	Selector (No
<input checked="" type="checkbox"/> Owns Rents	Selector (No
<input checked="" type="checkbox"/> Public Private	Selector (No
<input checked="" type="checkbox"/> Location Type	Selector (No
<input type="checkbox"/> Year Started	Numeric
<input type="checkbox"/> Square Footage	Numeric
<input checked="" type="checkbox"/> Square Footage Range	Selector (Asc
<input checked="" type="checkbox"/> Marketability Indicator	Selector (No
<input checked="" type="checkbox"/> Class 2 Indicator	Selector (No
<input type="checkbox"/> Accounting Firm Name	Text
<input type="checkbox"/> Company Officers	
<input type="checkbox"/> CEO Prefix	Text
<input checked="" type="checkbox"/> CEO Gender	Selector (No
<input type="checkbox"/> CEO First Name	Text
<input type="checkbox"/> CEO Middle Initial	Text
<input type="checkbox"/> CEO Last Name	Text
<input type="checkbox"/> CEO Suffix	Text
<input type="checkbox"/> CEO Full Name	Text
<input type="checkbox"/> CEO Title	Text
<input checked="" type="checkbox"/> CEO MRC Code	Selector (No
<input type="checkbox"/> Telecom V6	
<input type="checkbox"/> Telecom - Geography	
<input type="checkbox"/> Telecom - Spending	
<input type="checkbox"/> Telecom - Broadband & Internet	

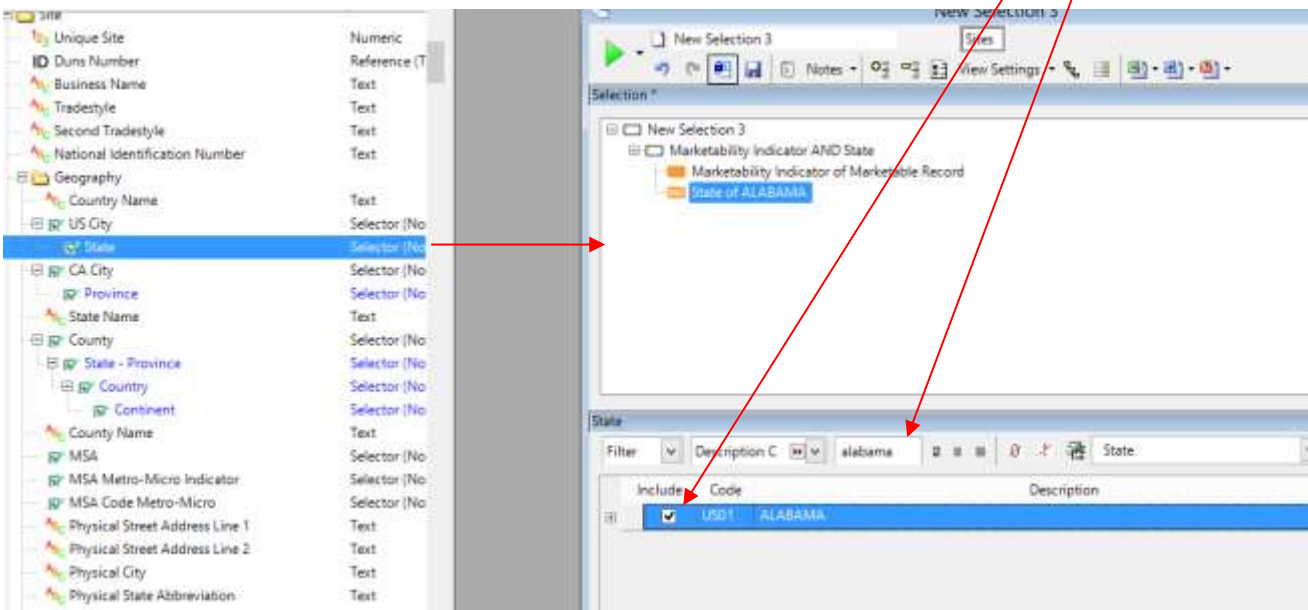
New Selection 3 Configuration:

The 'Marketability Indicator' section contains a table with the following data:

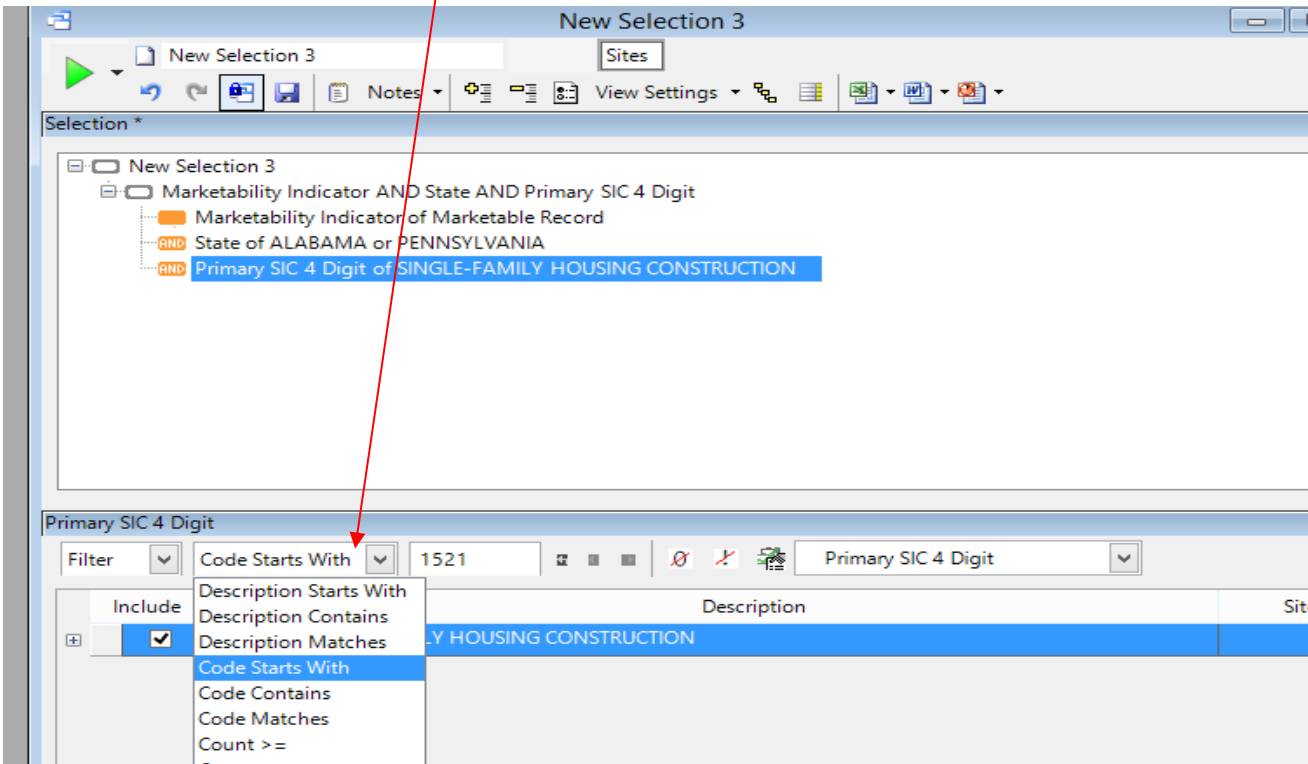
Include	Code	Description
<input type="checkbox"/>	!	Unclassified
<input type="checkbox"/>	A	Non-Marketable - Undeliverable Address or Unable to Confirm
<input type="checkbox"/>	D	Non-Marketable - De-listed Record
<input checked="" type="checkbox"/>	M	Marketable Record
<input type="checkbox"/>	O	Non-Marketable - Out Of Business
<input type="checkbox"/>	S	Non-Marketable - Undetermined SIC Code

Red arrows indicate the flow from the 'Marketability Indicator' field in the System Explorer to the configuration window, and from the 'M' row in the table back to the 'Marketability Indicator' field.

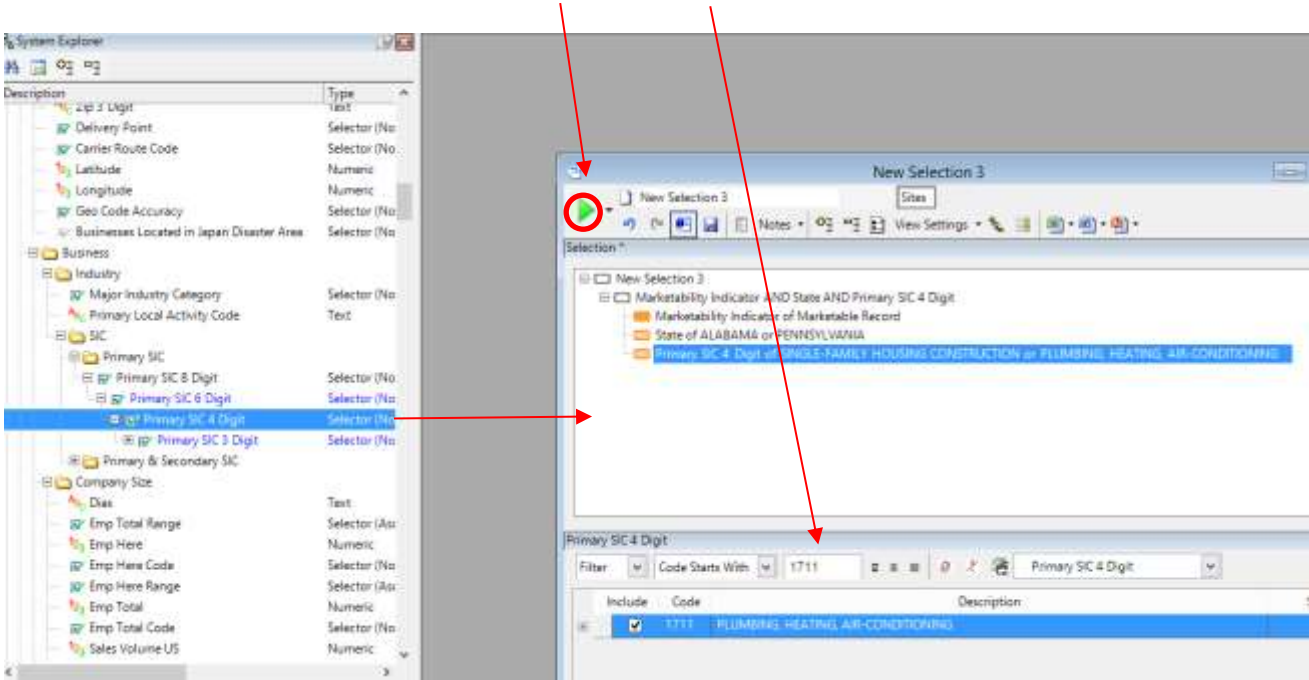
Now use the state field and drop that into your selection box as well then using the white box type the state you are looking for I used Alabama first and when you find it simply check the box.



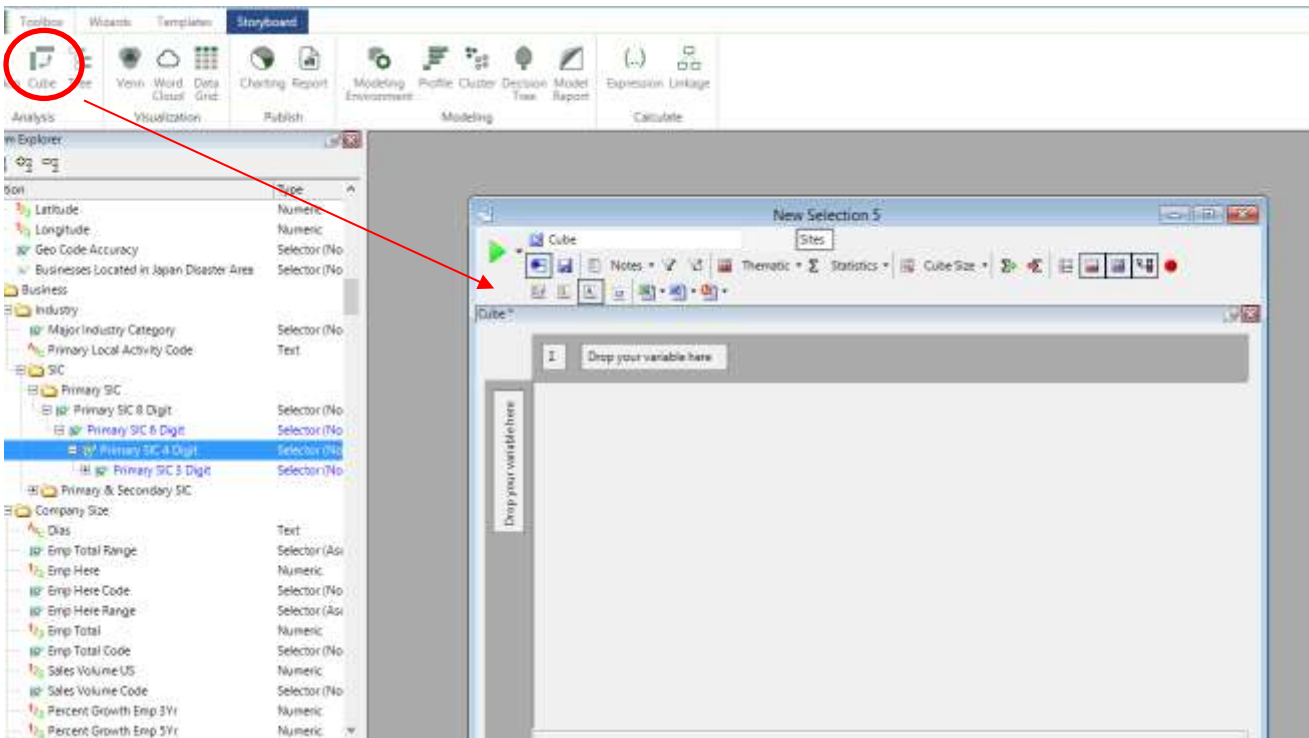
Once you have both states picked you can proceed to the Primary SIC 4 selection and use the same logic as you did with the states to find the SIC codes. For this you will want to change the description to the code starts with



Now proceed and pick your SIC codes. 1521 and 1711 and at this point you can now run your selection by clicking the green triangle button.

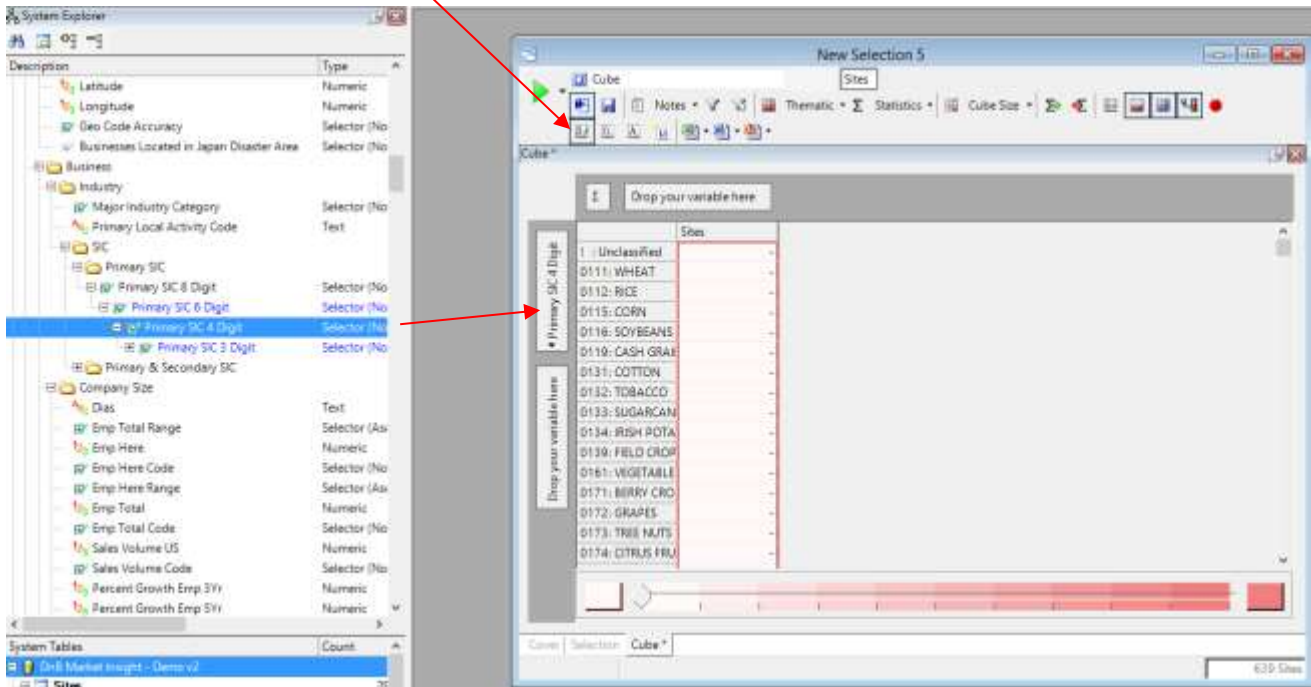


Once this finishes running and you get a count result then drag and drop a cube from your tool bar at the top, drop this right on top of your selection box.

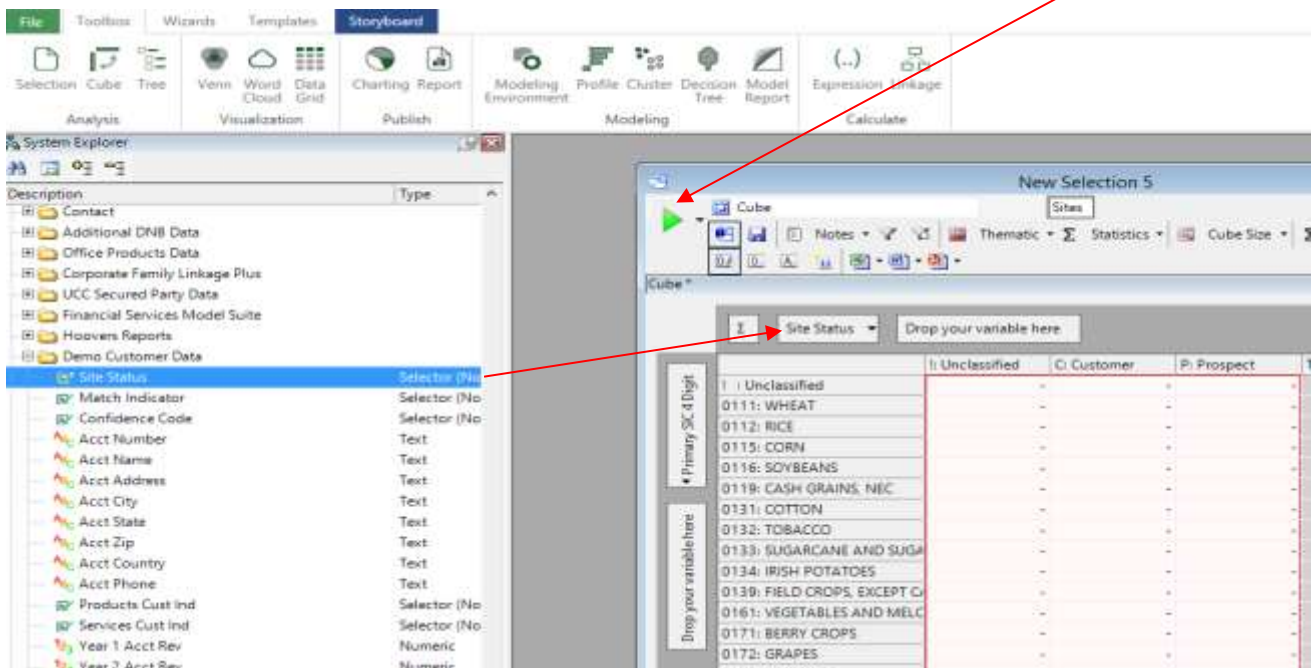


Now drag and drop the Primary SIC 4 onto the vertical part of your cube.

Also by clicking on the following button this will display the SIC code and the description in your cube.



Now drag and drop the site status field onto the horizontal portion of your cube and click the green run button.



When this finishes running you will be able to tell what your penetration is in those particular sic codes for customers vs prospects.

The screenshot shows a BI tool window titled "New Selection 5" with a "Cube" view. The pivot table displays data for "Site Status" across different SIC codes. The columns are "C: Customer", "P: Prospect", and "TOTAL". The rows are "1521: SINGLE-FAM", "1711: PLUMBING", and "TOTAL". The values are 19, 364, 383 for 1521; 10, 246, 256 for 1711; and 29, 610, 639 for TOTAL. Red circles highlight the "C: Customer" and "P: Prospect" headers.

	C: Customer	P: Prospect	TOTAL
1521: SINGLE-FAM	19	364	383
1711: PLUMBING	10	246	256
TOTAL	29	610	639