



Case Study

Financial Services

Client Segmentation, Product Placement and Sales Resource Optimization for a Global Benefits Organization



How OSG helped a leading global benefits consulting firm unify their fragmented business data to segment customers and develop a suitable marketing strategy that improved profitability.

“Work with OSG for new, innovative ways to deal with business problems. [They have] a great product that helped us understand our customers’ decision making and drive cross-sell and up-sell strategies that increased revenue.”

Director, Marketing and Consumer Insights

Executive Summary

The client is focused on delivering solutions in 130 countries across investments, retirement, health and talent management. They have over 20,000 employees and thousands of clients globally and used many internal and external sources of data and information to meet business needs. The data environment was highly fragmented. Our client was faced with a shrinking revenue base and stagnant profitability. With limited insight into B2B client segments, they lacked focus for growth. Heuristic-driven strategies had been employed for the prioritization of clients and prospects for acquisition, expansion and retention activities. The client tasked OSG with optimization of the sales process and resource utilization for efficient Go-To-Market strategies. Using our predictive analytics solutions, the client could identify the right marketing strategy for each customer segment, focus on customers with higher lifetime value and create highly efficient customer engagement models

OSG was tasked with three key objectives:



1

Client Segmentation: Develop a methodology to segment the client's global client base

2

Opportunity Identification: Prioritize client opportunities into actionable account categories (examples of actionable account categories: Grow vs. Maintain vs. Opportunistic vs. De-emphasize)

3

Portfolio Construction and Optimization: Develop analytical models to construct and optimize data driven client portfolios for various client segments

Strategy

Phase 1: Client Segmentation

- Client Segmentation Model
- Key Attributes by Segments
- Segment Summary Profile
- Segment Scoring and Account Classification
- Segmentation Typing Tool

Phase 2: Portfolio Construction & Optimization

- Current Situation Analysis
- Segment Specific Sales Coverage Models
- Segment Specific Sales Deployment Model
- Portfolio Optimization Scenarios
- Segment Targeting and Portfolio Alignment Simulator



Results

Customer Segmentation to Target Key Audience Groups for Cross-Selling and Up-Selling

- **B2B Client Segmentation:** OSG created detailed client profiles globally, and predicted client lifetime value
- **Cross-Sell/Up-Sell Strategies:** OSG's predictive analytics has guided optimal product placement and up-sell/cross-sell strategies which have maximized revenue
- **Client Manager Segmentation and Sales Resource Optimization:** OSG's approach has helped identify and match best/ideal sales resources against high-value clients, transforming global go-to-market approaches and creating highly efficient client engagement and servicing models
- **Margin Improvement:** By understanding which clients to focus on, and which clients to de-emphasize, margins have improved over time

Product Highlight



Tech-Enabled Services combines our powerful technology and analytics capabilities with our industry expertise to make a difference for our clients. By using the flexibility of our technology to tackle any business challenge, we can help customers in any industry shift to a customer-centric mindset and show them the impact of gathering, digesting, and implementing customer data in their strategy and practices.



The Power of OSG Analytics

OSG is a **global technology and analytics provider** that delivers outcomes on customer engagement to Fortune 500 clients with the help of leading analytical technologies and world-class global resources. OSG uniquely combines historical data with the future needs of patients, physicians, consumers, or customers of our clients by going beyond the “who” and the “what” and understanding the **“how” and “why” behind their decision-making**. OSG focuses on the 3E’s, Behavioral Expectations, Superior Experiences, Guaranteed Engagement, to help drive growth through **customer-centricity**.

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