CAPs Services Assessment Form

1. What are some of the Customer challenges facing your company that you may need help with?

- ☐ To identify my best customers and establish a customer profile
- ☐ Increase the number of "Good" customers in my portfolio
- ☐ Do a better job of retaining my current "Good" customers
- ☐ Reduce loss in my portfolio from poor performing customers
- ☐ Meet a Federal or State Compliance Order
- ☐ Assess the statistical effectiveness of my existing score-cards
- ☐ Organize my data so I can manage my customer relationships better

2. What is your current data environment?

- ☐ Only a financial system (I.e., QuickBooks) or manual accounting records/journals
- ☐ Single operating system and no central data warehouse (maybe a spreadsheet?)
- ☐ Multiple operating systems and no central data warehouse
- ☐ Central data warehouse, but minimal use and functionality
- ☐ Central data warehouse with heavy use and functional metadata
- ☐ Data Marts and/or OLAP cubes for specific business analytics or processes

3. How many active customers do you have?

- ☐ Unknown
- ☐ None - 500,000
- ☐ 500,000 - 1 million
- ☐ 1 million - 5 million
- ☐ 5 million or more

4. What business analytic software do your End-Users or Business Analysts use?

- ☐ Unknown
- ☐ SAS Business Intelligence
- ☐ SAS Enterprise Guide
- ☐ SAS Enterprise Miner
- ☐ Base SAS (PC or Mainframe)
- ☐ Spreadsheet (I.e., Microsoft Excel)
- ☐ Desktop Query tool (I.e., Microsoft Access)
- ☐ Microsoft SQL
- ☐ IBM DB2
- ☐ SPSS
- ☐ Other (Please List: _____)

5. What is your Response Rate on Acquisition marketing? For example, if you were to send a letter to people who might become a customer, how many out of 100 might respond?

- ☐ Unknown
- ☐ Less than 0.50%
- ☐ 0.50 % - 1.00%
- ☐ 1.00% - 1.50%
- ☐ 1.50% - 2.00%
- ☐ 2.00% or Greater

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6. **What is your Customer Attrition Rate per year? For example, if you have 100 customers, how many would leave within the next 12 months?**

   - ☐ Unknown
   - ☐ Less than 10%
   - ☐ 10% - 20%
   - ☐ 20% - 30%
   - ☐ 30% - 40%
   - ☐ 40% - 50%
   - ☐ 50% or Greater

7. **What is your average Annualized Net Revenue value per Customer (Collected Net Revenue / Months on Book x 12)?**

   - ☐ Unknown
   - ☐ Less than $50
   - ☐ $50 - $100
   - ☐ $100 - $200
   - ☐ $200 - $300
   - ☐ $300 - $400
   - ☐ $400 - $500
   - ☐ $500 or Greater

8. **What is your average Annualized Acquisition, Servicing, & Operating cost per Customer?**

   - ☐ Unknown
   - ☐ Less than $50
   - ☐ $50 - $100
   - ☐ $100 - $200
   - ☐ $200 - $300
   - ☐ $300 - $400
   - ☐ $400 - $500
   - ☐ $500 or Greater

9. **How many different people in your organization did you have to ask in order to answer question 1-8?**

   - ☐ I knew all the answers myself (I'm a genius!)
   - ☐ 1 other
   - ☐ 2 others
   - ☐ 3 others
   - ☐ More than 3

10. **Did you (or your associates) struggle with answering any of the Customer Analytic questions?**

    - ☐ Yes
    - ☐ No

NOTE of ENCOURAGEMENT:

If the answer to question #10 was YES, CAPs may have a solution for you that will save you hundreds, thousands, or millions of dollars annually with a fractional investment. The ROI can be demonstrated very easily.