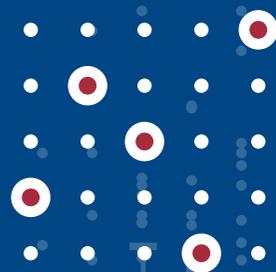


# CORPORATE RESEARCH OPPORTUNITY PROGRAM

*TRANSFORMING BUSINESS THROUGH CUSTOMER DATA*

The Wharton Customer Analytics Initiative (WCAI) seeks to bridge the traditional divide between business and academia, most notably through its Research Opportunity, a carefully structured program that helps business leaders connect with researchers interested in working on problems of importance to their companies.



**WHARTON  
CUSTOMER  
ANALYTICS  
INITIATIVE**

# Corporate Research Partnership: Project Phases

First, we help you define your challenge

## PHASE 1 – DEFINING THE OPPORTUNITY

Partners work closely with Wharton faculty to identify critical, long-standing business challenges that researchers can help solve. This includes a comprehensive data audit to understand what data assets are available that can be brought to bear on the problem in new and novel ways.

Next, we transfer data to perform tests (securely, of course)

## PHASE 2 – DATA TRANSFER

WCAI's data team then works to create a "test bed" for new analytics methods. Keeping security and data integrity in the forefront, WCAI reviews the partner's metadata, creates a data spec for transfer, receives and quality checks the data, and creates "clean" metadata that is more accessible to researchers.

Then, we present your project to the world's smartest people

## PHASE 3 – WEBINAR/CALL FOR PROPOSALS

Together with the Corporate Partner, WCAI hosts an online webinar profiling the project to an extensive multi-disciplinary network of top faculty and data scientists from around the world. This crowd-sourced approach attracts a range of novel proposals from researchers passionate about solving the same challenges the company faces.

... and help you to evaluate their responses and choose the winners

## PHASE 4 – PROPOSAL SELECTION

WCAI provides the partner with review ratings that promote a diverse portfolio of research projects. WCAI and the partner then work to identify the most novel and analytically sound submissions that can leverage the data "at-hand" to address the partner's key challenges. The ultimate decision for which projects move forward rests with the partner.

We then manage the research process and facilitate regular check-ins

## PHASE 5 – RESEARCH

WCAI manages the legal licensing of data to the selected research teams and handles all effort in data transfer. Once research is underway, WCAI manages day-to-day operations to minimize demands on the partner's time and resources. Scheduled check-in calls offer the partner insight into the research process and let scholars bring their expertise directly to the partner for further exploration.

Lastly, the findings are presented and we help you engage in an ongoing relationship with the research teams

## PHASE 6 – FINDINGS AND APPLIED RESEARCH

At the end of the research cycle, WCAI hosts a private, in-person symposium where researchers present their findings to the partner. Shortly after, WCAI helps run a candid analysis of the findings with the partner and can facilitate an ongoing relationship with select teams whose ideas and methods are most appealing, as the partner moves to apply key findings.

# RESEARCH, STUDENT PROGRAMS, AND SPONSORSHIP

Learn more about WCAI and our corporate partner programs at [wcai.wharton.upenn.edu](http://wcai.wharton.upenn.edu)

## CORPORATE PARTNERS\*

**ANNALECT • BAZAARVOICE • EQUILAR • L'OCCITANE • ELECTRONIC ARTS • URBAN OUTFITTERS  
HERSHEY'S • RUSS REID • TERADATA • NIELSEN • OMNICOM GROUP • PACIFIC GAS & ELECTRIC  
AMERICAN RED CROSS • USAA • SYMANTEC • HERTZ • DELOITTE • SIRIUSXM**

*\*PARTIAL LISTING*

“Working with the WCAI data team was remarkably easy. Once the licensing agreement was signed, they handled everything our data security team required, and let me focus on my day-to-day tasks. We even took the data key they made to onboard our new employees!”

– Yassine El Ouarzazi, Mars Inc.

“The WCAI webinar was excellent. I was surprised and pleased with the amount of understanding they had of our data, the quality of the slides they prepared, and the ease at which WCAI carried the conversation and handled questions from the audience. We were also particularly impressed with how sophisticated the proposals were given the confidentiality WCAI maintained and the small amount of data presented on the webinar.”

– Zach Anderson, Electronic Arts

“We were thrilled with the proposals we received. In addition to recommendations, WCAI even identified proposals we might have ignored because they weren't focused on the original question. Some proposals allowed us to include people from across the organization—people who weren't involved initially but became very excited by this program.”

– Timo Petermichl, Hertz Corporation

“We were very pleased with the smooth process of the research as it progressed. WCAI staff made sure we were prepared in advance for all calls, and the calls were spaced so we could still get our own work done. We were also able to see where the researchers were going and provide direction or correction if they were headed in an area we had already explored.”

– Angela Malina, BonusCard.ch AG