

# Data Analysis

## **Team Crawford**

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# Data Analysis



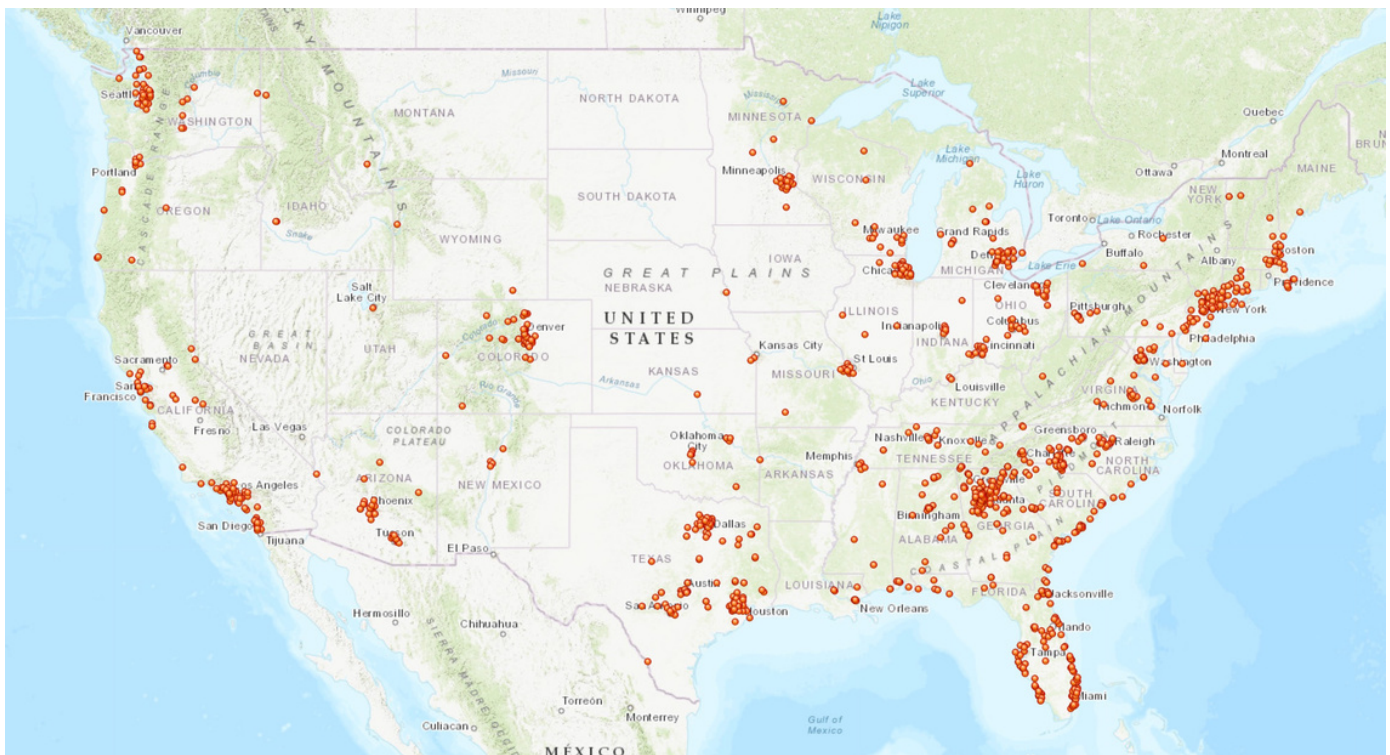
Data Analysis

Geographic Mapping  
HubSpot Analysis

# Data Analysis

## Geographic Mapping

With provided demographic data about Crawford's clients, we were able to map out individual investors' locations. Using ArcGIS, over 900 clients' zip codes were inputted and mapped within the program. Each pin on the map represents the location of one of Crawford's clients. Analysis of the geographic data can reveal information about locations where most Crawford clients primarily reside and offer opportunities for expansion. We researched the wealthiest cities in the US and compared them to the locations of Crawford's current client base. Fortunately, Crawford has a presence in all of the top 10 wealthiest US cities. We noticed that four of these top 10 wealthiest cities have a relatively low number of Crawford clients: Washington, D.C., Boston, MA, Princeton/Trenton, NJ, and San Jose, CA. There is an opportunity to expand in these cities as they contain ideal targets. Future marketing and communication strategies can be targeted in these cities to attract potential clients from our target audience.



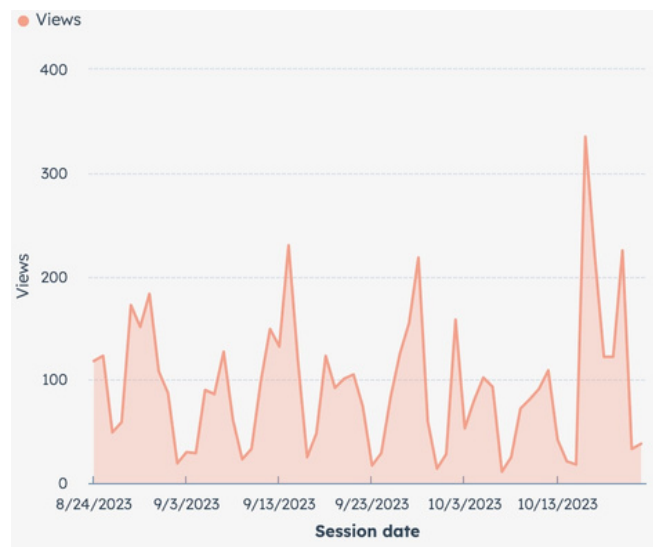
10 Wealthiest US Cities	Crawford has Presence (Y/N)
Washington, D.C.	Y (4)
Boulder, C.O.	Y (10+)
NYC/Newark/Jersey City	Y (10+)
Bridgeport/Nowark, C.T.	Y (5)
Boston/Cambridge, M.A.	Y (3)
Trenton/Princeton, NJ	Y (3)
Seattle/Tacoma, WA	Y (10+)
San Fran/Berkeley, CA	Y (10+)
San Jose, CA	Y (3)

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## HubSpot Analysis

### Visitor Activities

We were given access to HubSpot to analyze data from the backend of the website and to make recommendations based on our analysis. We looked at several key metrics on HubSpot to help inform our suggestions. First, we looked at landing page visits. The Individual Investors homepage is viewed most frequently by website users. This means that our website redesign will be put to good use on a page that sees many visitors. Other popular pages are the Investment Philosophy page and the Our Team page. We also analyzed the average time spent on each webpage. Overwhelmingly, the Our Team page, which introduces all members of the Crawford team, averaged the highest time spent by users. This indicates that users are interested in learning more about the people who will be managing their portfolios. Crawford can continue to set itself apart by emphasizing its personal relationships. We also noted that Disclosures and A Message from the Founder had the lowest average time spent at 3 minutes. Lastly, we analyzed the time of day/week/month that users were accessing Crawford's website. Overall, the site sees more visitors at the close of each fiscal quarter. We can infer that people are looking ahead to the next quarter and may be looking for financial improvement opportunities and support as they analyze their earnings from the previous quarter. The website also sees more viewers towards the beginning of each week, as shown in the graph. Viewership trails off toward Fridays and picks back up again on Mondays as potential clients gear up for the week and consider finding financial support as a client.



### Pages

We also analyzed pages on Crawford's website to gain insight into content topics. The most popular topics are educational blog posts discussing dividend stocks. Second to those are unique articles that describe the Crawford strategy in depth. It is also important to note that the most popular articles were written by Crawford's founder, John Crawford, III. We also analyzed a correlation between market conditions and website visitors. On several occasions when the stock market saw a drop, such as in September 2022, the Crawford website had a spike of approximately 300 visitors. This shows that as the stock market experiences volatility, people begin looking for opportunities to educate themselves about Crawford and its services.