

## **I. EXECUTIVE SUMMARY:**

### **A. One- to three-page description of the project**

This research study was conducted with the focus of creating a strategic marketing plan, with the goal of implementing hyper personalization, while addressing consumer ethical and privacy concerns with data collections for Patel Brothers, located in East Windsor, New Jersey. Although Patel Brothers has existed and competed in this market for over 50 years, Patel Brothers have been and are always willing to change and adapt, if it helps the business thrive. Patel Brothers possesses a strong brand awareness, and a very loyal customer base, but its marketing strategies are weak, and one-dimensional, and have not been utilizing its strengths. Implementing hyper personalization is a necessity of a business at this point, considering how personalization is the new norm for businesses in this day and age. Patel Brothers' current marketing strategies do not contain hyper personalization, or any form of it. Our strategic plan will develop a strong and sustainable strategy for implementing hyper-personalization, while also making sure to address ethical and privacy concerns raised by consumers.

### Research Methods Used in Study

Our research study contained a mix of both secondary and primary sources, which can be broken down into 3 phases of research. The 1st phase of research consisted primarily of secondary research, in which we began by researching hyper personalization in order to gain a thorough understanding of it, and its importance, benefits, and risks. We looked into Patel Brothers website and social media accounts to understand Patel Brothers online presence and how it was utilized; and we read and analyzed online reviews to gain the customer's perception of Patel Brothers. The next phase consisted of primary research; the largest part being the interview with the Patel Brothers-East Windsor location store owner, Mrs. Margi Ashburn. We also conducted a survey of customers within Patel Brothers' target market to gain an understanding of their opinions on several issues, and a keyword ranking test. Finally, we moved into the last phase, which consisted of all secondary research; we looked into the online presence and marketing strategies of several competitors to find areas in which Patel Brothers were strong and weak in. We researched already existing hyper personalization strategies to deduce strategies that did and did not work. Lastly, we researched modes of and methods to improve customer service, as we needed a strong and efficient one to handle customer concerns that may arise from our strategic plan.

### Findings and Conclusions of Study

The findings and conclusions of the study are organized into a SWOT analysis, containing what we believe to be Patel Brothers' Strengths, Weaknesses, Opportunities, and Threats.

- ➔ Strengths: Patel Brothers has a strong brand awareness due to its longevity in the market, and its abundance of stores. Consequently, Patel Brothers has a loyal customer base, due to its quality and variety of products offered. Patel Brothers has a willingness to adapt, and is constantly trying to expand and improve.
- ➔ Weaknesses: Patel Brothers lacks any hyper personalization strategy in its marketing plan. In fact, its entire marketing plan is very weak, as most customers are untouched or unaware of current marketing techniques already in place. Its data collection processes are also very one dimensional, and focus purely on general demographics. Withal, its customer service has a negative reputation of being inefficient and unfriendly.
- ➔ Opportunities: Implementing hyper-personalization can drastically increase profits and guarantee long-term success. Patel Brothers' has a large following on social platforms, so effective promotions can have a large impact. Creating an app would give Patel Brothers a major advantage over its competitors, none of which have an app.
- ➔ Threats: Competitors websites are significantly more informative and rank higher in SEO than Patel Brothers. A significant majority of customers are worried about businesses having data about them, and when a company starts collecting too much customer data, they lose the trust of their customers.

### Proposed Strategic Plan

To visualize our strategic plan, we developed 6 Goals with the intent of using these goals to guide us when commencing our strategic plan. Listed below are the 6 goals we created:

- ➔ Significantly increase the effectiveness of Patel Brothers' online presence by means of app and website development and social media marketing.
- ➔ Resolve Customer Complaints regarding ethical and privacy issues of data collection.
- ➔ Improve Search Engine Optimization of the Patel Brothers website, to increase traffic and exposure.

- Improve customer data collection tactics of Patel Brothers to create detailed customer profiles.
- Enact marketing strategies for hyper-personalization that more customers respond to.
- Successfully utilize an AI-driven hyper-personalization software system to achieve hyper personalization in Patel Brothers.

Using the 6 goals listed above, we established 8 strategies that composed our strategic plan to implement hyper-personalization into Patel Brothers while addressing customer's ethical and privacy concerns regarding data collection.

- Create and Improve Patel Brothers online platform and social media accounts
- Revamp Customer Service by hiring Licensed Customer Service Trainers to resolve customer complaints as they come
- Increase the SEO of the Patel Brothers website by improving Google Search rankings to increase exposure
- Develop a custom AI-driven hyper-personalization algorithm to offer personalized recommendations and coupons.
- Hire cybersecurity experts to ensure data collection process and cloud storage are not compromised, guaranteeing customer privacy.
- Launch an official Patel Brothers mobile app to present the AI system to customers
- Offer a paid membership which allows customers to fully reap the benefits of the hyper-personalized AI.
- Embed AI chatbots to create a positive and reliable customer service experience

### Proposed Budget

Our plan required funding for a variety of factors, most notably for labor, as displayed in our overall budget. Our budget has accounted for all guaranteed and potential costs. The total cost is: **\$1,776,700**

## **II. INTRODUCTION:**

### **A. Description of the Business or Organization**

Patel Brothers is a family-owned U.S. based supermarket chain specializing in foods, beverages, and more from the Indian subcontinent and Middle East. It has become the oldest and largest Indian grocery chain in America, gaining a reputation for having the best quality goods. These stores are able to sell many different types of products like fresh vegetables, packaged snacks, cold beverages, and prepared foods made daily. Patel Brothers is also able to sell various non-food items as well, selling pots, pans, home decor, and games. This variety in products sold, as well as brand loyalty and recognition, gives Patel Brothers a significant advantage over other Indian and South Asian grocery stores.

Patel Brothers was founded in 1974 in Chicago, Illinois, by brothers Mafat and Tulsi Patel. After moving to America for an MBA in 1968, Mafat found himself craving the cultural Indian food he grew up with, a problem many immigrants felt daily. The ingredients needed to cook his cultural *Gujarati* food were not available in the United States, so he decided to start a grocery store to sell these ingredients to others like him. However, he needed help getting these foods to Chicago, so he called his wife Aruna and his brother Tulsi to America in 1971 to help start a grocery store and supply ingredients from India. After three years of planning, they opened the first Patel Brothers location in September of 1974. Greatly supported by the local South Asian community, Patel Brothers became a household name, building a powerful and trustworthy reputation, gaining strong consumer loyalty, and opening new locations in the United States. Today, the Patel Brothers franchise has 53 locations across the continental United States, in which most are clustered around the Eastern Seaboard, particularly the Northeast.

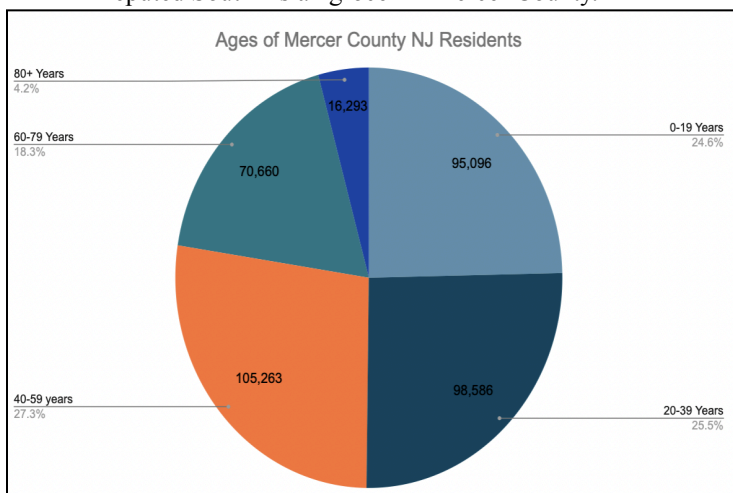
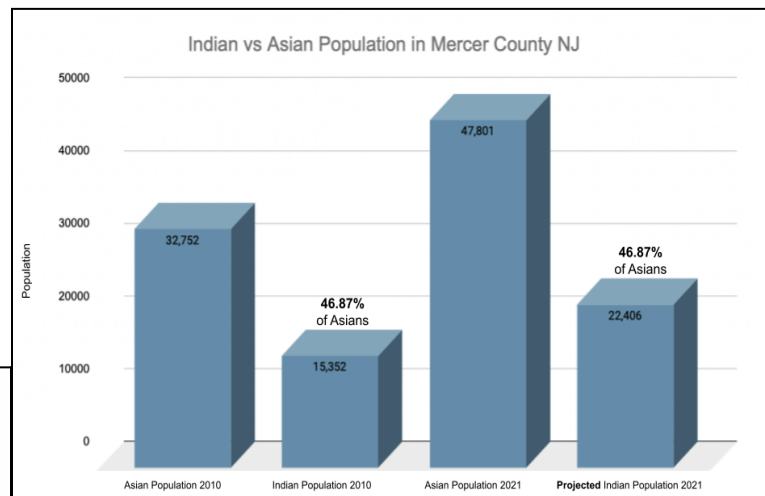
Patel Brothers is a family business, with Mafat's sons and daughter running all of the day-to-day operations of Patel Brothers, as well as managing warehouse operations in New York and Chicago, and managing all Patel Brothers locations. Brand loyalty and recognition, along with a variety of high-quality products sold, allow Patel Brothers to generate around \$5 Million in annual sales. Patel Brothers has a current net worth in excess of \$140 Million dollars.

### **B. Description of Target Market/Demographics and Psychographics**

The main target market for Patel Brothers is the South Asian community. This includes people originating from Afghanistan, Bangladesh, Bhutan, India, Maldives, Nepal, Pakistan, and Sri Lanka, primarily those originating from the Indian subcontinent. Nearly 5% of New Jersey residents are South Asian. However, nearly all Patel

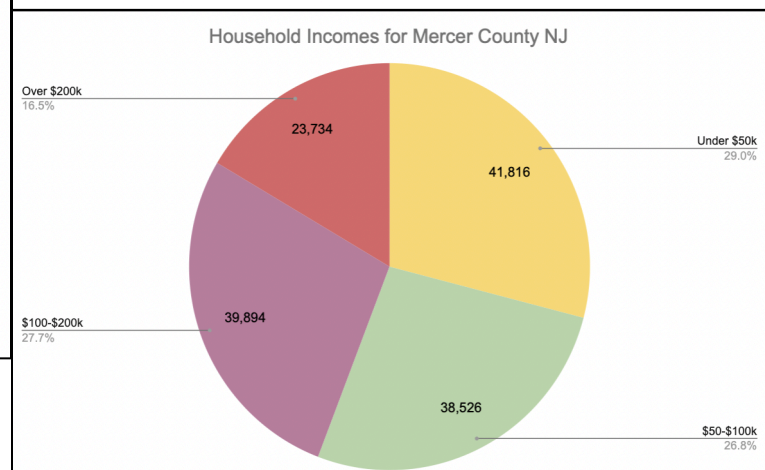
Brothers locations are in a county with a South Asian population of 10% or higher, in context to the total population of the county. There are 7 Patel Brothers locations in New Jersey, however our research will be conducted based on the East Windsor branch in Mercer County.

Due to the lack of data on the Indian population of Mercer County after 2020, we used data from the 2010 census to make a projection of the Indian population based on the Asian population reported in the 2020 census. In 2010, Indians made up 46.87% of Asians. Using this percentage to accommodate for the significant increase in the Asian population over the last 10 years, the Indian population in Mercer County becomes 22,406 people. A primary target market of over 22,000 people is extremely beneficial to Patel Brothers, being the most reputed South Asian grocer in Mercer County.



The primary target market for Patel Brothers is adults aged between 40-59. They are usually parents and have settled down with a greater disposable income compared to younger adults. Many of these adults aged 40-59 have more than one child, therefore needing more food, and more likely to purchase more groceries. This target market makes up over 27% of all Mercer County residents, a large group to be able to market products to.

The primary target market from an economic standpoint for Patel Brothers would be those households earning over \$100,000. Making up over 44% of Mercer County households, these households are the ones with the larger disposable incomes willing to spend extra money at a grocery store. They would also be more willing to try a new product and respond more positively to different marketing strategies.



### C. Overview of the business or organization's data collection processes for business decision making

Currently, Patel Brothers employs a few data collection strategies, all of which are based on each individual location. Every location in the Patel Brothers franchise is responsible for their own data collection processes, as there is no single method required by the Patel Brothers Franchise to use. However, most locations use similar data collection processes, including Patel Brothers - East Windsor. Although this type of data collection method could raise concerns about the uniformity of the Patel Brothers franchise policies, this has shown to work, as Patel Brothers have thrived in the asian groceries market for over 50 years. At Patel Brothers - East Windsor, a select few data collection strategies are in place currently:

#### I. General Primary Data collection

- A. Patel Brothers collects demographic data in surrounding areas of the store
- B. Data on consumers such as age, gender, income, south asian population in area.

- C. This data is used by Patel Brothers to help them visualize a target market and consumers that they plan to market towards
- II. Purchase and Inventory Data collection
  - A. Patel Brothers collects data about purchases for a single item, and the inventory for that said item
  - B. This data is used heavily to create and predict consumer trends, which helps Patel Brothers decide what items to order and market, and also gives performance indications on already introduced items

These are the primary data collection methods used by Patel Brothers - East Windsor to make business decisions. An example of this is how Patel Brothers noticed the growing local Nepali population and started supplying cultural Nepali groceries. Using their demographic data, Patel Brothers was able to notice a population trend and change their inventory accordingly.

### III. RESEARCH METHODS USED IN THE STUDY

#### A. Description and rationale of research methods used to conduct the research study

To find accurate and detailed information regarding hyper-personalization and our company, Patel Brothers, we determined that it is necessary to have a combination of primary and secondary research methods, which total to nine. The total research methods can be broken down into 3 phases. Phase 1 consists of the first round of secondary research, 1.1, 1.2, 1.3. Phase 2 was the entirety of our primary research, 2.1, 2.2, and 2.3. Finally, we conducted a second round of secondary research in Phase 3, 3.1, 3.2, and 3.3

#### 1.1 Importance, Benefits and Risks of Hyper-Personalization (Secondary):

We conducted deep internet research and read several articles into the benefits and uses of hyper personalization, as well as various strategies in place in companies already. We also viewed the potential risks associated with hyper personalization to gain a complete knowledge of hyper personalization. Our research enabled us to have a better understanding of hyper personalization, and also helped us refine our ideas for the strategic plan involving the incorporation of hyper personalization into Patel Brothers.

**Rationale:** We used the article to give us a deeper understanding and knowledge about hyper-personalization, seeing as that is the theme for this year's manual. This article also gave us a strong base and helped us create specific questions before interviewing Patel Brothers about their hyper-personalization strategies. We also identified risks and vulnerabilities so that we can work around them, and make sure they are accounted for in our strategic plan.

#### 1.2 Patel Brothers Website, YouTube Channel, and Social Media Accounts (Secondary):

To understand Patel Brothers' current online presence, we visited and analyzed their official company website, YouTube channel and social media accounts. We intended to gain insight into the history and goals of Patel Brothers, as well as their online promotions. Additionally, we analyzed the user-friendliness, the amount of store promotion, and effectiveness of their YouTube channel and social media accounts.

**Rationale:** Our research into Patel Brothers' online presence helped us prepare questions for when we eventually meet their regional manager. We didn't want to waste our time asking questions during our interview that could've been easily answered online. After analyzing Patel Brothers' website, we were able to identify potential improvements that could increase its effectiveness. We also identified potential solutions to the lack of marketing on the YouTube channel and social media accounts.

#### 1.3 Online Customer Reviews and Rankings (Secondary):

- In order to gain a better understanding of the consumer's opinions on Patel Brothers, we reviewed the reviews left on sites such as Google or Yelp on Patel Brothers. We identified several strengths that Patel Brothers had, which consumers rated them highly on. We also read negative reviews on Patel Brothers, with most applying to their customer service. We also looked at rankings online of Patel Brothers and its direct competitors.

**Rationale:** As previously stated, we overviewed online customer reviews in order to gain a perspective of consumer's opinions on Patel Brothers. In order to determine a strategic plan involving



hyper personalization, we had to understand what customers wanted and didn't want. Reading online reviews enabled us to do so. The online rankings showed us customer opinions on which South Asian grocery stores are better and how Patel Brothers compares to its competition.

## 2.1 Interview with Patel Brothers Regional Manager (Primary):



For us to deepen our understanding, and gain valuable information regarding Patel Brothers' marketing strategies, future company goals, and data collection methods, we met with the Regional Manager of Patel Brothers - East Windsor, Margi Ashbun. We conducted a 30-minute interview using questions we prepared earlier, where Ms. Ashbun provided us with Patel Brothers' data collection techniques, current and future marketing strategies, and largest competitors. Subsequently, we toured the venue, gaining insight into the variety of goods and services Patel Brothers has to offer.

**Rationale:** The information Mrs. Ashbun gave us was crucial to understanding what hyper-personalization techniques Patel Brothers currently utilizes, and what techniques can be implemented in the future. We learned what marketing strategies Patel has attempted in the past which have failed, and what has proven to be successful. The subsequent tour displayed the unique services Patel Brothers offers that most competitors are unable to provide. Finally, we were able to receive crucial data and factual information about Patel Brothers that cannot be found on the internet or

anywhere else, knowledge that will help us formulate a strategic plan.

## 2.2 Google Form (Primary)(APPENDIX A):

We conducted a survey through Google Forms for 67 Mercer County households, primarily those of South Asian origin. The questions on this survey applied only to the South Asian grocery stores they shopped at. We asked respondents about their shopping habits, responsiveness and informedness of marketing strategies, their opinions on store attributes and online presence, and their customer loyalty.

**Rationale:** This survey gave us key insights into how consumers perceive their grocery stores' online presence and how they would react to a more hyper-personalized marketing strategy. We needed to know exactly how consumers within Patel Brothers' target market feel about hyper-personalization. These results will help us know what we should and shouldn't include in our strategic plan.

## 2.3 Patel Brothers Search Engine Optimization Research Measure (Primary):

We believe that hyper-personalization is directly linked to a company's online presence; so, it was necessary for us to research Patel Brothers' Search Engine Optimization(SEO). SEO is a process used to determine how prevalent one's website is on the web. In order to measure this, we conducted a keyword ranking test. A keyword ranking test is one of the most important metrics when examining a business's SEO. A keyword ranking test involves searching up keywords relating to Patel Brothers and then finding Patel Brothers ranking in context to the keyword search. We conducted the keyword ranking test on three different search engines; Google, Safari, and Google Maps. We then recorded and analyzed the results of each test on each search engine

**Rationale:** The online presence greatly impacts the degree of success for hyper-personalization. Therefore, we needed to see Patel Brothers' SEO to determine how strong its online presence is. We needed to understand if Patel Brothers was benefiting from its website, and if consumers were going there instead of competitors websites. We conducted the keyword ranking across multiple search engines to acquire a more detailed and accurate response, knowing that consumers use more than one search engine.

## 3.1 Research and Online Presence Analysis of Competitors(Secondary):

In order to understand how Patel Brothers' largest competitors are remaining competitive with Patel Brothers, we researched Subzi Mandi, Patidar, and Star Big Bazaar and analyzed their successful marketing strategies. We also analyzed their online presences (website/social media) and compared it with Patel Brothers.

**Rationale:** The research on Patel Brothers' competitors enables us to know additional marketing strategies that could be effective in the South Asian groceries market. It also allows us to compare Patel Brothers' marketing strategies with those of its competitors. Patel Brothers has the most reputable and trustworthy brand of all these stores, but their competitors are able to succeed and grow within this market, so for Patel Brothers to remain at the top, they need to employ new marketing strategies which are proven to work. We analyzed the competitors' online

presences to compare the user-friendliness, the effectiveness of the marketing strategies used, and amount of store promotion with that of Patel Brothers.

### 3.2 In-depth research and analysis of already existing hyper personalization in companies (Secondary):

We researched different ways in which companies were able to implement some form of hyper-personalization into their business. We then analyzed the positive and negative impacts of these strategies. We researched the implementation of hyper-personalization in Starbucks and Amazon specifically to observe the benefits and costs of hyper-personalization for the top companies in their respective markets.

**Rationale:** We required this research to understand what works and what doesn't when implementing hyper-personalization. We then used this analysis on positive and negative strategies when formulating our strategic plan. We needed to make sure that our strategic plan held some merit, and that it was equipped to help Patel Brothers increase its hyper-personalization.

### 3.3 Methods to Strengthen, and Different Types of Customer Service (Secondary)

We already understood that a strong customer service was needed to successfully implement hyper personalization. We also knew that many consumers found the current Patel Brothers service to be ineffective and unhelpful. Thus, we conducted research to understand methods that we could implement to strengthen our customer service. We also orchestrated research about different type of customer services available, so that we could utilize that ones that fit into the business concept of Patel Brothers

**Rationale:** We needed to figure out what changes specifically that we needed to implement so that we could improve our customer service, because a strong customer service was needed to answer any customer complaints that may arise from the application of our strategic plan. We also needed to understand which modes of customer service fit into the business model of Patel Brothers, and which appealed to consumers.

## B. Process used to conduct the selected research methods

Our research was conducted in 3 major phases: Phase 1, which utilized secondary research, Phase 2, which contained our primary research, and finally Phase 3, which included more secondary research. Phase 1 consisted of 3 secondary research methods; (1.1) *Importance, Needs, and Risks of Hyper-Personalization*, (1.2) *Patel Brothers' Website, YouTube Channel, and Social Media Accounts*, (1.3) *Online Customer Reviews and Rankings*. Phase 2 consisted of 3 primary research methods; (2.1) *Interview with Patel Brothers' Regional Manager*, (2.2) *Google Form*, (2.3) *Patel Brothers Search Engine Optimization Research Measure*. Finally, phase 3 consisted of 3 secondary research methods; (3.1) *Research and Online Presence Analysis of Competitors*, (3.2) *In-depth research and analysis of already existing hyper personalization in companies*, (3.3) *Methods to Strengthen, and Different Types of Customer Service*

Phase 1, the first phase, consisted of entirely primary research. We read a paper titled *Connecting with meaning - Hyper-personalizing the customer experience using data, analytics, and AI*, written by a team of researchers working at Deloitte and Omnia AI. From this, along with additional internet research, we gained a comprehensive understanding of what hyper-personalization is and what the benefits and risks are of it. We gained knowledge of why and how companies implement hyper-personalization and how it affects consumers. We then researched Patel Brothers' current online presence, which includes their company website, YouTube channel, and Social Media accounts. We took note of the strengths and weaknesses of their website, as well as the opportunities for increased marketing through their YouTube channel and Social Media accounts. Finally, we looked at customer reviews on Google and Yelp to observe what customers were happy with and what customers disliked. Since customer service is imperative for successful hyper-personalization, our strategic plan needed to address these said various complaints. We also looked at online rankings by Yelp, Yellow Pages, and others of Patel Brothers and its competitors.

Phase 2, the next phase, consisted of our primary research. We started with an in-person meeting with Margi Ashbun, the regional manager for Patel Brothers - East Windsor, and a great-granddaughter of Mafat Patel. She informed us about Patel Brothers' data collection techniques, current and future marketing strategies, and largest competitors. Next, we conducted a survey of 67 households within Patel Brothers' target market who might shop at Patel Brothers - East Windsor or any South Asian grocery store near East Windsor. We spread our survey using social media and local connections, while also putting up posters in Patel Brothers, as well as their largest competitors. We asked respondents about their grocery shopping habits and how responsive they would be to

hyper-personalized marketing strategies. We also asked how worried they are of business entities having data on them to know how strongly we have to address these concerns in our strategic plan. Lastly, we conducted a keyword ranking test, a metric used to measure a company's website's SEO. We used the SEO data to get a more in depth understanding of Patel Brothers online presence, particularly their traffic and presence on their website.

Phase 3, the final phase of our research study, consisted of additional secondary research. We researched Patel Brothers' largest competitors' marketing strategies and analyzed their online presences. We compared their online presences to Patel Brothers' and noticed improvements Patel Brothers needs to make in order to remain above the competition. We then researched existing hyper-personalization strategies used in various companies, primarily Starbucks and Amazon, to understand what has benefited the company and what hasn't. We measured the degree of success by noticing sales changes and customer satisfaction (customer reviews). Finally, we researched methods to strengthen our customer service, and different modes of customer service that were appealing to our customers and fit the Patel Brothers business model.

## IV. FINDINGS AND CONCLUSIONS OF THE STUDY

### A. Findings of the research study

To make it easier to understand, we have listed our findings into bulleted points, none in any order. The methods are displayed by chronological order, and not by importance.

#### 1.1 Importance, Benefits, and Risks of Hyper-Personalization (Secondary):

Displayed below are the key takeaways from the articles that we read and analyzed pertaining to the needs and risks of hyper-personalization

- Consumer's attitudes and expectations of a business, and competition is drastically changing → New importance on Hyper-personalization
  - ◆ Consumers now expect businesses to understand their wants and needs, and generally a better customer experience. This is because the abundance of competition and increase of globalization gives consumers a choice, therefore making it more likely that they will choose a company with a better consumer experience → hyper-personalization very crucial for a business to thrive in today's market.
- According to a study conducted by Harvard Business Review, well executed hyper personalization can return 8x the investment on it and lift sales by 10% or more → Benefits of hyper-personalization
  - ◆ As demonstrated above, companies need to increase their consumer experience in order to compete and thrive in an increasingly difficult market. Hyper-personalization offer the highest level of benefits to companies while achieving a better consumer experience
- Data breaches and aggressive or insensitive hyper personalization can damage brand image and decrease sales → risks of hyper personalization
  - ◆ Although personalization has its benefits, it has its drawbacks. Sensitive data on consumers that are breached and leaked can have a catastrophic impact on consumer opinions on the business, so it is important to properly safeguard data on consumers.

#### 1.2 Patel Brothers Website, YouTube Channel, and Social Media Accounts (Secondary):

Displayed below are the key observations we made while analyzing Patel Brothers' online presence

- Website: Doesn't promote individual stores, mostly advertises the company as a whole. It is very user-friendly, being easy to navigate and find information. There is very little information and promotion for individual stores. The only things it shows are upcoming Patel Brothers openings across the country as well as a featured product. However, this information never changes on a weekly or even monthly basis. There is a map with all Patel Brothers locations, but other than the address, there is no additional information on anything related to that store. The main emphasis of their website is on South Asian recipes using ingredients purchasable at a Patel Brothers location. There are pictures, links to YouTube videos, blogs, and more posted throughout the website.
- YouTube Channel: Patel Brothers' YouTube Channel is called Patel's Fresh Kitchen and is just for recipes. They post a video every week or two with a new recipe. These recipes are usually based on the occasion. The channel has grown in popularity over time. They were averaging about 3K views 6 months ago —

Now getting over 20K views. They are currently at 17.3K subscribers. There is absolutely no promotion of Patel Brothers' stores and products

- Social media – Facebook: Patel Brothers was very effective in having an account just for Patel Brothers - East Windsor which posted about events, prices, and new products related to that store. However the account only has 1 post since May of 2017. They have only 624 followers, with posts that get on average below 15 likes.
- Social Media – Instagram: This account is for Patel Brothers as a whole and not for individual stores. It is mostly recipes (same ones as on YouTube Channel), but there are some product promotions. They have 921 posts total, averaging close to 100 likes per post, with 19.7K Followers.

### 1.3 Online Customer Reviews and Rankings (Secondary):

The following points have been summarized from the hundreds of reviews left online on the Patel Brothers-East Windsor location and rankings by reputed websites of Patel Brothers and its competitors.

- The advantages: Patel Brothers offers a huge variety of ethnic South Asian foods, a competitive advantage that appeals to consumers. The items are competitively priced, and the store is clean and most products are fresh, and the convenience was very good.
- The disadvantages: Consumers have complained about the customer service at Patel Brothers, a problem that is repeatedly mentioned in the reviews. Specifically, the customers complained that the service did not resolve their issues, were uncooperative, and not effective. Consumers also complained about the freshness of some products, although these were more isolated occurrences.
- According to rankings by Yelp, Yellow Pages, Stilt, and more, Patel Brothers is the best South Asian grocery store in the East Windsor area. All three rankings were different, but they all had Patel Brothers at the top.

### 2.1 Interview with Patel Brothers Regional Manager (Primary):

We met with Margi Ashbun, regional manager of Patel Brothers - East Windsor. We summarized her responses to our questions below.

- Patel Brothers collects demographic data on age/gender/race for business decisions.
- From purchases, Patel Brothers is able to notice trends and adjust its inventory accordingly. They also use that data to know how many employees to hire.
- Patel Brothers' primary and only target market are older, asian women who are 30+.
- Their most prominent marketing strategies are their membership/rewards program and weekly email flyers. They also support local events and have given \$50K to sponsor the police.
  - ◆ Current rewards program: \$500 spent = \$5 off
- Their marketing budget is approximately \$500 a week, with the email flyers costing the most money.
- Patel Brothers has tried selling American groceries, but that didn't work. They did however, add four food and drink stalls which have become extremely popular.
- They aim to add new stores in the future, as well as improve systems technology
- Swaad is the only brand sold by Patel Brothers. There are no outside companies selling their products there.
- Patel Brothers does not use any form of hyper-personalization in their business

### 2.2 Google Form (Primary)(APPENDIX A):

We conducted a survey of 67 households residing within 10 miles of Patel Brothers - East Windsor and other South Asian grocery stores in the area. We analyzed the data and listed the most important data points below.

- 65.7% of respondents shop at more than one South Asian grocery store
- 70.1% of respondents would value their grocery store having an app.
- 64.2% of respondents say they would value a more personalized experience in a grocery store.
- 41.8% of respondents are not part of their grocery store's membership or say that their store don't offer one
  - ◆ 17% of respondents who shop at Patel Brothers say that Patel Brothers doesn't offer a membership. Another 19.1% aren't part of the membership. (Total 36.1%).
- 80.6% of respondents were likely to try a brand new product while grocery shopping.
  - ◆ 46.3% of respondents said they would try a new product if there was a sale/promotion on it.
- 73% of respondents are concerned about business entities having data about them



## 2.3 Patel Brothers Search Engine Optimization Research Measure (Primary):

We used a variety of key words and phrases in our search results; we got them by searching keywords and phrases relating to South Asian grocery stores and the different products that they offered. We brought into effective action key words such as “south asian grocery store”, “south asian grocery store near me”, “where to buy indian groceries”, and “best south asian grocery store”. We made sure to include the phrase “east windsor”, because we wanted results in the location surrounding Patel Brothers-East Windsor. After conducting the keyword test, and although some keywords resulted in encouraging results, we uncovered that Patel Brothers severely lacked a proper SEO. To put this into perspective, we measured how far the Patel Brothers website was from the top in every keyword search, and averaged it all to get the value 13. On average, the Patel Brothers website was the 13th link offered in the keyword test, a value far too high for Patel Brothers to be successful online, and comparatively higher than some of its competitors.

## 3.1 Research and Online Presence Analysis of Competitors (Secondary):

We conducted extensive research into the online presence of Patel Brothers main competitors, namely Star Big Bazaar, Subzi Mandi, Patidar. We needed to understand Patel Brother’s online presence as compared to its competitors, to see what areas Patel Brothers had an advantage over, and what areas that Patel Brothers were subpar and needed to improve. Below, we listed key information found in our research for each competitor.

- ➔ All of Patel Brothers competitors boast websites that are more effectively and useful to customers than Patel Brothers website. Unlike Patel Brothers, competitors allowed customers to view product details and prices that were offered at stores, and some even allowed customers to purchase them for curbside pickup.
- ➔ Lack of user friendliness was evident in competitors’ websites. In contrast to Patel Brothers user friendly website, its competitors’ websites were very confusing and buggy, creating an overall unappealing experience while using the website, despite its positives mentioned above.
- ➔ Patel Brothers’ social media presence is large compared to its competitors. By running several social media accounts, such as Instagram, Facebook, and Youtube, Patel Brothers has gained an advantage on the social media marketing over its competitors.
- ➔ None of Patel Brothers’ competitors have hyper-personalization implemented into its online platforms. Because of this, hyper-personalization seems necessary for Patel Brothers to control the market, because of the advantage hyper-personalization gives over competitors.

## 3.2 In-depth research and analysis of already existing hyper personalization in companies (Secondary):

We researched current examples of hyper-personalization in Starbucks, Amazon, and Facebook to understand what data was collected, how this affected sales and consumers, and whether hyper-personalization was effective for these companies. Listed below are the most important facts we found in our research.

- ➔ Starbucks — utilizes a data-driven AI algorithm to offer personalized suggestions based on data collected from demographics, consumer preferences, past purchases, and more. All of this is presented to consumers through the Starbucks app. This strategy is able to suggest over 400,000 different hyper-personalized offers.
  - ◆ Impact: Significant increase in consumer loyalty, increased revenue, 25% of total transactions occurring on the app — Successful
- ➔ Amazon — Collects various different types of data to send hyper-personalized emails to customers with product recommendations. The data used to create these suggestions include demographics, searches, time spent on searches and products, purchase history, browsing habits, and average spending. After analyzing this data, Amazon is able to predict what customers will likely buy next.
  - ◆ Impact: 35% of sales are from recommended products. Customers feel that Amazon is tailored to their needs and wants — Successful
- ➔ Facebook — collects more data than any other company except google. Facebook tracks user’ activity on other non-facebook sites. They use all the data they collect to help marketers target the right people for ads. They also use user data to personalize features, content, and recommendations. The data that is collected include app activity(searches, friends, likes, tags), off-app activity(searches on other sites), facial data, and more.
  - ◆ Impacts: Facebook is #1 social platform for marketers, increased user engagement and satisfaction due to hyper-personalization, accusations of mistreatment of data (had to testify before Congress), and lack of trust in Facebook. — Successful, but untrustworthy

### 3.3 Methods to Strengthen, and Different Types of Customer Service (Secondary):

We conducted research into different ways that customer service can be strengthened. We also looked into different modes of customer service that appeal to Patel Brothers customers. Below, we listed key takeaways from our research.

- Strengthen customer service skills by analyzing negative feedback — Customer service should analyze negative feedback and use it as a basis for improvement. Creating Customer Service ratings surveys can also highlight areas of improvement.
  - ◆ This can help customer service communicate solutions clearer to customers, and can help customer service reps establish good relationships with the customers themselves
- Enhance Customer Service by catering to customer needs — Customer Service needs to understand the needs of a customer to properly help them.
  - ◆ This can mean connecting to the customer in a certain way to properly answer their questions. This also can mean that the Customer Service itself should be available and appeals to a customer
- AI-driven Chatbots are the most efficient type of hyper-personalization
  - ◆ New national study found that 68% of respondents had positive impacts with Ai-driven chatbots
  - ◆ Customers are not willing to wait in call queues to refund or complain about cheaper items, such as ones bought from a grocery store

We organized the findings deemed most important into a SWOT analysis, which comprises of the strengths, weaknesses, opportunities, and threats of Patel Brothers

#### SWOT Analysis

<p style="text-align: center;"><b>Strengths</b></p> <ul style="list-style-type: none"> <li>- Ranked above its competitors (nationally and locally)</li> <li>- Constantly trying to expand - more stores and more within stores</li> <li>- Brand Awareness — Patel Brothers have been in the South Asian grocery market for nearly 50 years, longer than anyone else.</li> <li>- Brand Loyalty — Consumers are very loyal to Patel Brothers because of their longevity in the market and variety and quality of products sold</li> <li>- Online Presence — Patel Brothers has a larger or equal presence on social media and the internet than its competitors.</li> <li>- Willingness to Adapt — Patel Brothers is willing to adapt and does adapt when situations arise.</li> </ul>	<p style="text-align: center;"><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>- Ineffective Use of Online Presence — Social media accounts are not used often, and website is not used effectively to promote products</li> <li>- Lack of specific data collected on consumers (more data on demographics and purchasing trends)</li> <li>- Weak Current Marketing Plan — Many Patel Brothers shoppers don't know the current membership program and email flyers exist, and membership/flyers are a very basic and ineffective marketing strategy.</li> <li>- Customer Service — Consumers have complained and have left Patel Brothers because of an unhelpful and disrespectful customer service.</li> <li>- Younger Audiences — Patel Brothers marketed towards older generations (40+), younger audience not touched by target market.</li> </ul>
<p style="text-align: center;"><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>- The implementation of hyper-personalization has the capability to radically improve profits and long-term success</li> <li>- Online Presence — Patel Brothers has a large following on all of its online accounts, so huge</li> </ul>	<p style="text-align: center;"><b>Threats</b></p> <ul style="list-style-type: none"> <li>- Almost <math>\frac{3}{4}</math> of customers are worried about businesses having data on them - bad for hyper-personalization</li> <li>- Websites and information for Patel Brothers' competitors appears above Patel Brothers for</li> </ul>

<p>opportunity to generate revenue with successful marketing strategies</p> <ul style="list-style-type: none"> <li>- Online services such as Twitter, Facebook, YouTube, and Instagram.</li> <li>- App — gives Patel Brothers another function to market online, advantage over competitors because none have an app, and appeals to younger consumers who prefer an app. <ul style="list-style-type: none"> <li>- Valued by all consumers, not just younger audiences.</li> </ul> </li> <li>- AI chatbot — open 24/7, can answer consumer questions and refer consumer complaints automatically</li> </ul>	<p>most searches — Competitors have more favorable Search Optimization.</p> <ul style="list-style-type: none"> <li>- Patel Brothers' greatest competition consists of Star Big Bazaar, Patidar Supermarket, Subzi Mandi, and Anpa Bazaar Cash and Carry</li> <li>- Competitors' websites contain more store information</li> <li>- If too much personal data is collected, customers stop trusting the company (Ex: Facebook)</li> </ul>
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## B. Conclusions based on the findings

After concluding our time spent working with Patel Brothers, we integrated our most significant findings to develop conclusions, which we used as a basis for creating our strategic plan. None of Patel Brothers's competitors, such as Star Big Bazaar or Patidar Supermarket, currently employ hyper-personalization in their marketing plan. To gain a huge advantage in a very competitive market, Patel Brothers must incorporate hyper-personalization, driven by automated intelligence, into their marketing plan, while addressing customer issues with collecting data on them.

When formulating conclusions from our research findings, we combined all of our conclusions to create an overall conclusion that served as the backbone and basis of our strategic plan: **Patel Brothers lacks hyper-personalization in its current marketing plan, an online function necessary to implement one, and customer service to handle customer complaints and issues.** This is demonstrated by Patel Brother's ineffective use of their current online presence, especially its website and social media accounts, and ineffective membership and current marketing strategies. Compared to its competitors, the Patel Brothers website severely underperforms, and serves no use to the consumer. Adding hyper-personalization can radically improve Patel Brothers' customer retention, revenue and profitability, and give an edge over the competition. However, to successfully implement hyper-personalization, Patel Brothers needs a stable online platform. Also, many customers have complained about the customer service, citing disrespectfulness, and unhelpfulness, and no resolvment towards their problems. As we developed the strategic plan, we made sure to create strategies that created an online platform for the hyper-personalized software we planned to develop, and improve a very poor customer service. To further explain, we broke down the main conclusion into 5 parts below.

- 1) Current Online Platform to implement hyper-personalization is underwhelming and ineffective. As demonstrated above, a stable and strong online platform is needed to launch hyper personalization, and in this case, an AI-driven hyper personalization software. However, their current online platforms, especially their website, is underwhelming. Patel Brothers does not offer an app either, limiting their options to only a website, which is lacking in certain areas compared to its competitors. As a consequence, customers are switching to competitors because their website proves to be more useful
- 2) Expansion of online presence and platforms is necessary to maximize effects of hyper-personalization. Hyper-personalization can radically increase profits for Patel Brothers, but can only be limited to the amount of online platforms run by the company. In this case, hyper-personalization would be limited to a website, which could several cap the potential of hyper personalization. However, one way to prevent this is to create and release new online platforms, such as an app. An app is easier to access than a website, and can appeal to younger generations, which is not Patel Brothers current target market. With an app, Patel Brothers can increase their exposure on the market, gain a huge advantage over competitors, and can reach non-target markets.
- 3) Customer Service, whose function is to handle customer complaints, are disrespectful and unhelpful. A key function needed to successfully implement hyper-personalization is a good and

effective customer service program. However, Patel Brother has been criticized, especially in online reviews, for its dysfunctional customer service. As a result, most customers who left Patel Brothers blame its unhelpful customer service. To increase its customer retention and satisfaction, Patel Brothers needs to focus on its customer service. This will improve consumers' trust with Patel Brothers since a significant majority of their target market is worried about businesses having data about them.

- 4) Patel Brothers needs to improve its customer data collection capabilities for hyper-personalized marketing strategies to have an effect on customers. Patel Brothers currently only collects data on demographics, like age, gender, and race. This is not enough to make marketing strategies that can effectively get customers to respond to them. If over  $\frac{1}{3}$  of Patel Brothers shoppers aren't part of the membership or don't even know it exists, their marketing strategies are definitely ineffective. By collecting data on individual consumers, Patel Brothers can create a more effective marketing campaign guaranteed to at least make itself known to customers. The implementation of hyper-personalization can drastically increase the successfulness of Patel Brothers' newer marketing strategies. Patel Brothers needs hyper-personalization, or else they will continue wasting their marketing budget on relatively unknown and ineffective marketing tactics.
- 5) AI - driven hyper personalization software is the most cost effective and best way to achieve hyper personalization. Hyper-personalization can appear in lots of different forms. However, the most promising type, and the best fit for Patel Brothers is an AI-driven hyper personalization SaaS. Using this software, Patel Brothers is able to customize the AI processes, and implement it into its online platforms. The SaaS is also the most cost effective, technologically advanced, and the industry premium. By implementing an AI-driven hyper personalization SaaS, Patel Brothers can see radical increases in their customer retention, ratings, profits, and revenue at a reasonable price.

#### Individual Conclusions for every Research Method

Research Method	Conclusions
<b>1.1 Importance, Benefits, and Risks of Hyper-Personalization (Secondary):</b>	<ul style="list-style-type: none"> <li>→ To successfully hyper-personalize, Patel Brothers must tread a fine line with collecting and handling consumer data, and pay special attention to the needs and wants of the consumer</li> <li>→ If successfully executed, there is no ceiling for the potential returns</li> </ul>
<b>1.2 Patel Brothers Website, YouTube Channel, and Social Media Accounts (Secondary):</b>	<ul style="list-style-type: none"> <li>→ Patel Brothers needs to redesign their website to include more company-wide marketing and individual store promotions <ul style="list-style-type: none"> <li>◆ Currently has very little of either</li> </ul> </li> <li>→ Patel Brothers must use their relatively large following on social media to drive promotions</li> </ul>
<b>1.3 Online Customer Reviews and Rankings (Secondary):</b>	<ul style="list-style-type: none"> <li>→ Most Customers are happy with and loyal to Patel Brothers <ul style="list-style-type: none"> <li>◆ Enjoy variety and quality of products, competitive pricing, and clean and presentable store</li> <li>◆ Customers trust Patel Brothers – must not be lost</li> </ul> </li> <li>→ Patel Brothers must fix their customer service to resolve the main complaints that currently exist and any future ones</li> </ul>
<b>2.1 Interview with Patel Brothers Regional Manager (Primary):</b>	<ul style="list-style-type: none"> <li>→ Need to create newer forms of marketing, ones in place are very outdated <ul style="list-style-type: none"> <li>◆ Especially hyper-personalization, no forms of it exist in current marketing plan</li> <li>◆ Marketing forms should be more technologically advanced</li> </ul> </li> <li>→ Expansion of target market, primarily to younger audiences <ul style="list-style-type: none"> <li>◆ Current target market is too targeted, inefficient way to spend marketing budget</li> </ul> </li> </ul>

<b>2.2 Google Form (Primary):</b>	<ul style="list-style-type: none"> <li>→ Consumers willing and open to new changes/improvements in Patel Brothers <ul style="list-style-type: none"> <li>◆ Especially personalization, appeals to consumers</li> </ul> </li> <li>→ Consumers very concerned with businesses having data about them <ul style="list-style-type: none"> <li>◆ Patel Brothers must have a good customer service to deal with consumer complaints, especially with data collection practices</li> <li>◆ Customers must trust Patel Brothers to not misuse their data</li> </ul> </li> <li>→ Patel Brothers not focused with marketing their membership in current marketing plan <ul style="list-style-type: none"> <li>◆ Patel Brothers needs hyper-personalized marketing to make customers aware of and respond to marketing strategies</li> </ul> </li> </ul>
<b>2.3 Patel Brothers Search Engine Optimization Research Measure (Primary):</b>	<ul style="list-style-type: none"> <li>→ Very unfavorable SEO for Patel Brothers <ul style="list-style-type: none"> <li>◆ Patel Brothers consistently ranked lower than competitors during keyword test</li> </ul> </li> <li>→ Patel Brothers needs to increase its SEO so it can rank higher than competitors, leading to more clicks and traffic on website</li> </ul>
<b>3.1 Research and Online Presence Analysis of Competitors (Secondary):</b>	<ul style="list-style-type: none"> <li>→ Patel Brothers must redevelop website and improve online presence to gain a competitive advantage online</li> <li>→ Patel Brothers and many of its competitors do not possess distinguishing factors <ul style="list-style-type: none"> <li>◆ Hyper-personalization may give those distinguishing factors to Patel Brothers</li> </ul> </li> </ul>
<b>3.2 In-depth research and analysis of already existing hyper personalization in companies (Secondary):</b>	<ul style="list-style-type: none"> <li>→ Patel Brothers can use hyper-personalization to offer recommendations to customers on what else to add to their grocery list <ul style="list-style-type: none"> <li>◆ Proven to work by Starbucks and Amazon</li> </ul> </li> <li>→ Patel Brothers needs to ensure that they are protecting customers' privacy <ul style="list-style-type: none"> <li>◆ Risk losing the trust of customers</li> </ul> </li> </ul>
<b>3.3 Methods to Strengthen, and Different Types of Customer Service (Secondary)</b>	<ul style="list-style-type: none"> <li>→ Customer Service needs training to analyze negative feedback and cater to customer needs <ul style="list-style-type: none"> <li>◆ Patel Brothers can implement a feedback form to receive feedback</li> </ul> </li> <li>→ AI chatbots can greatly improve customer service <ul style="list-style-type: none"> <li>◆ However, customer service is still required for complaints that cannot be handled by AI.</li> </ul> </li> </ul>

## V. PROPOSED STRATEGIC PLAN

Our research centered around the Patel Brothers — East Windsor location; thus, most of our primary data reflects that one location. However, even though our primary research was based on just one Patel Brothers branch (East Windsor), our proposed strategic plan can be implemented by any branch, or by the Patel Brothers franchise as a whole. Our strategic plan is developed around 6 goals, detailed below. We then thoroughly described the 8 strategies used to carry out the plan. Finally, we created specific metrics that can measure the effectiveness of each part of our plan.

### A. Objectives and rationale of the proposed strategic plan

The primary goal of our proposed strategic plan is to successfully and efficiently implement AI-driven hyper-personalization into Patel Brothers while reassuring customers that their data isn't being misused. Based on the conclusions we made from our research findings, we developed 5 objectives that our strategic plan will meet. These objectives were crucial in guiding our strategic plan.



### Objectives

Goal #	Objective	Rationale
Goal #1	Significantly increase the effectiveness of Patel Brothers' online presence by means of app and website development and social media marketing.	Making Patel Brothers strengthen its current online platforms and accounts can help effectively launch, use, and promote its hyper personalization services. Increasing customer engagement and knowledge about hyper personalization also leads to increased purchases, and consequently, revenue.
Goal #2	Resolve Customer Complaints regarding ethical and privacy issues of data collection.	Hyper-personalization relies on customers trusting businesses with their data. However, data breaches in other companies, and over-pushing for data has caused customers to become distrusting of increased data collection. Customers will trust Patel Brothers to properly manage their data if they know Patel Brothers is striving and making privacy an important aspect.
Goal #3	Improve Search Engine Optimization of the Patel Brothers website, to increase traffic and exposure	Improving the SEO of Patel Brothers website would lead to consumers finding Patel Brother over competitors. The improved SEO also stimulates online exposure and traffic on the website, and strengthens Patel Brothers online presence.
Goal #4	Improve customer data collection tactics of Patel Brothers to create detailed customer profiles.	Collecting detailed and specific data on individual purchases and shopping habits can help personalize promotions between customers and Patel Brothers. Creating detailed customer profiles based off of this data allows the AI-driven software to offer targeted promotions that increase product purchases, customer satisfaction, and customer retention .
Goal #5	Enact marketing strategies for hyper-personalization that more customers respond to.	Patel Brothers' current marketing strategies are inefficient and customers aren't very responsive to them. Utilizing hyper-personalization, they can create personalized communications about different store promotions that customers are more likely to respond to. These marketing strategies can increase the number of products customers buy each time they shop.
Goal #6	Successfully utilize an AI-driven hyper-personizational algorithm to achieve hyper personalization in Patel Brothers	Patel Brothers does not currently have hyper personalization in its marketing plan. The most cost-effective, and efficient way to implement hyper personalization is to create an algorithm that sends hyper personalized promotions to individual customers using AI. With the supermarket industry constantly becoming more technologically advanced, a software system would be the best option to keep up with competitors.

## **B. Proposed activities and timelines**

### **1. Create and Improve Patel Brothers online platform and social media accounts**

In order to successfully implement hyper personalization into Patel Brothers, strong and effective online platforms and social media accounts are needed. To achieve this, enhancements to the current platforms and accounts are needed. As each of the current platforms and accounts are different in function and structure, different additions should be taken to achieve our goal.

Website — Patel Brothers' official website will be redesigned to include and promote more company and store information. There is no information on individual stores available on the website except their addresses. The

home page of the website will focus more on new products and company-wide deals instead of recipes and blogs. The link to store promotions will actually include information about the different weekend deals occurring in each store. The website can be used to market any type of information Patel Brothers or any individual store wants to communicate with customers. These communications can be used to effectively market all aspects of our strategic plan. These communications rely on the website being regularly updated. The website hasn't been updated in months and is still showing the same featured product as 6 months ago. There are aspects of Patel Brothers' current website that are important to keep. The top of the website below the official logo is a series of different images that change in an orderly fashion. These images also contain clickable links that take you to different subpages within the website. These pictures can be changed to be less about recipes and more about new information about stores. Lower down the home page, there is a link to apply to a Patel Brothers store nearby. This is an important link to have within a company website. Visually, Patel Brothers makes sure to use their company colors of mainly green and a little gold, but the website could be more colorful to keep viewers engaged.

Social — Patel Brothers' current Instagram account (@patelbrothers), is mostly associated with Patel's Fresh Kitchen, the YouTube channel. This account will now include Patel Brothers' current marketing efforts of email flyers which contain the weekend deals. These flyers will be posted every Thursday to ensure they are viewed by households before they go grocery shopping. The official Instagram account will also be used to market any new products, stores, promotions, or sponsorships, important store information/additions, or any aspects of our strategic plan that require marketing. The Facebook account, which is specific to East Windsor, will also do this, but with information pertaining to only the East Windsor branch. This is the most important of all the social media accounts since their target market is the older population, which is mainly on Facebook. This account will not be posting recipes. The Instagram account, however, will continue posting recipes. These recipes will only use Swad products, and utilize product placement to show viewers that the ingredients for these recipes are all available at Patel Brothers. Since Instagram is more prominent among the younger population, this account will be useful in reaching a newer demographic. The Youtube channel will also post recipe videos in this way. Because Youtube allows for longer videos, Patel Brothers can show where in the store viewers can find some of the ingredients in the recipes and if some of the ingredients are priced lower that weekend. Additionally, each video will end in an advertisement for Patel Brothers' other online platforms.

## **2. Revamp Customer Service by hiring Licensed Customer Service Trainers to resolve customer complaints as they come**

When implementing hyper personalization, the crucial aspect of this is the customer itself. But, many customers have become concerned and unsure of hyper personalization, particularly the idea that businesses and corporations possess and collect large amounts of data about them, which they misuse. However, the current Patel Brothers customer services are unequipped and not properly trained to handle customer complaints. Indeed, many customers have left negative reviews online, most centering around the ineffectiveness, and rudeness, that they have experienced after conversing with customer service representatives. Thus, Patel Brothers must change this by hiring Licensed Customer Service Trainers. These individuals will teach the current customer service valuable lessons and skills to effectively answer and resolve any grievances expressed by customers. By being equipped with the proper knowledge and training, the customer can handle customer criticism, especially those concerning Patel Brothers data collections processes, as many customers have expressed ethical concern for that amount of data companies possess, about them. By answering these statements of dissatisfaction, Patel Brothers can earn the trust of customers, driving sales and creating a positive reputation surrounding the franchise.

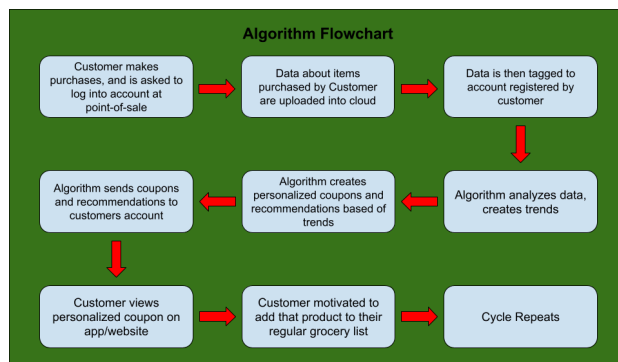
## **3. Increase the SEO of the Patel Brothers website by improving Google Search rankings to increase exposure**

Search Engine Optimization uses a multitude of factors to determine the best and most accurate results to one's Google Search. Patel Brothers can improve their Search Engine Optimization, and be at the top of the search results for customers, by utilizing keywords and metadata. Already, our strategic plan significantly upgrades Patel Brothers websites, making it cleaner, sleeker, and faster. This in itself will improve the SEO of Patel Brothers, as customers will be attracted to a quality website, increasing traffic and pushing the website into relevance. However, SEO's primary metric is keywords, and how they are utilized; The search engine would recommend sites based on the amount of the keyword specified. Thus, Patel Brothers should utilize a variety of keywords on their website. The greater the variety and utilization of keywords, the more likely a Search Engine will move and recommend Patel Brothers website higher in ranking and over competitors. Additionally, the metadata, or key information about the

contents of a webpage, should include lots of information to appear higher in rankings. Search Engines use metadata to rank website links after a search is conducted, and the chance of Patel Brothers ranking higher increases. That way, a consumer will be more likely to choose Patel Brothers website because it appears first and over competitors.

#### **4. Develop a custom AI-driven hyper-personalization algorithm to offer personalized recommendations and coupons.**

In order to integrate hyper personalization into their marketing plan, we decided to develop a custom algorithm that utilized AI-driven machine learning to hyper personalize coupons and recommendations sent to every customer. Customers will need to create an account, which they are able to in the mobile app or website. Customers have to give their name, email, phone number, Patel Brothers branch they shop at, and some basic demographics like date-of-birth and gender. Once an account is created, users will start receiving hyper-personalized recommendations



and coupons after making purchases from Patel Brothers. Every purchase made after making an account is loaded onto the app or website to be analyzed by the AI. Data collected from this include products purchased, purchase size, money spent, and purchases per week/month. The flowchart to the left illustrates that process in which hyper personalized coupons are sent. After this cycle is repeated over and over again, the AI will start to offer more coupons to those who are more responsive to them. These coupons will be even more personalized since the AI can track which coupons they used and which they didn't. The purpose of this hyper-personalization algorithm is to encourage repeat purchases, and to appeal to customers. The personalized coupons and

recommendations will not be for products that customers already buy regularly. The coupons are meant to influence customers to buy products they normally wouldn't buy. If they like the product, they will be more likely to add that product to their regular grocery list. Customers would find these personalized coupons very appealing. The data collected to hyper personalize the coupons are very limited, giving customers a sense of privacy, considering how many customers believe that some data collection processes are ethical violations. All accounts, and their corresponding data, are stored onto a cloud server, which the algorithm utilizes to create hyper personalized coupons.

#### **5. Hire cybersecurity experts to ensure data collection process and cloud storage are not compromised, guaranteeing customer privacy.**

Many customers have become concerned with the data collection processes, particularly with data breaches, which could expose personal information onto the internet. Thus, we propose to hire cybersecurity experts to review our data collection processes, and make sure they cannot be compromised. The experts will conduct thorough research into our current data collection processes, which utilizes customer purchase history, and general demographics, and determine any weaknesses that can be exploited. They will also look into the cybersecurity capabilities of the cloud, and ascertain any weaknesses. The experts will then work to fix these issues, by establishing cybersecurity measures such as firewalls, which will keep the information from the internet, preventing viruses or online malware from accessing the data. The experts will also create and launch anti-virus software into the algorithm and cloud, which will help detect and destroy any viruses that do manage to slip past other measures.

Furthermore, upon completion of protecting and upgrading cybersecurity for the algorithm and cloud service, the cyber security experts shall create and publish a press release onto the Patel Brothers social media accounts, website, and mobile app. The press release shall convey the message that the Patel Brothers cloud system, which holds customer data, and the algorithm, have become secured, and is completely safe. The experts will guarantee to the customers that these security measures will make their personal data safe from data breaches and viruses. Customer Service should also convey similar messages to questioning and concerned customers. Customers are more likely to use our hyper-personalized service knowing that their private data is safely guarded, and their ethics are not broken.

#### **6. Launch an official Patel Brothers mobile app to present the AI system to customers**

Developing a Patel Brothers app is also another online application in which Patel Brothers will create to expand their online presence and applications. It is necessary to create an app; as Patel Brothers have never owned or operated an app, and it allows for faster loading times and less glitches. If all consumers purchased exclusively from the website, they would experience slower loading times, and more glitches, and ultimately an unappetizing experience. The new app would be simple and sleek, to give a ‘cleaner’ look to the app, and to avoid confusion with customers. The sleekness also would appeal to consumers, as they prefer apps that are easy to use. The color theme for the app would be contrived of green and gold, from the Patel Brothers logo. The icon of the app would be the Patel Brothers logo, as that logo represents the Patel Brothers franchise. The app would operate similarly to the website, after its configurations proposed are implemented. The primary function of the mobile app is to alert customers to store promotions, which are hyper personalized by our custom software system. An added benefit to the creation of an app would be access to younger demographics; Patel Brothers’ primary target market are older demographics. In a digital age, most of the younger generations own or have access to a mobile device, and an app gives Patel Brothers a function to reach younger markets.



Use of AI — The newly launched app is the perfect way to present the AI system created in strategy 4 to customers. The personalized recommendations and coupons will be displayed on the main screen for customers to immediately see. These will be mixed with the company-wide deals that are offered every weekend. There will be other tabs that users can enter so they can view all products within Patel Brothers, their past purchases, their account details, and the new recipes that Patel’s Fresh Kitchen posts.

## 7. Offer a paid membership which allows customers to fully reap the benefits of the hyper-personalized AI.

Patel Brothers currently employs only a free membership which involves only a rewards program (\$500 spent = \$5 off). Our strategic plan eliminates the need for this. Instead, Patel Brothers will now offer 2 memberships: a free, and paid membership. The differences between the two are shown in the chart to the right. Having a free membership allows every Patel Brothers shopper to make use of our hyper-personalized AI and take

Free Membership		Paid Membership
Free – just create an account	→	Costs \$89.99 yearly or \$7.99 monthly
Max coupons used per month: 10	→	No limit on coupons used per month
Max % off on coupons: 5% off	→	Max % off on coupons: 10% off

advantage of the potential savings they can receive. However, due to the enormity of the savings from the personalized coupons, customers must pay to receive the full benefits of our strategic plan. The limits placed on the free membership serve as an incentive for customers to upgrade to the paid membership. Those who shop at Patel Brothers more often or have larger grocery lists would benefit more from the paid membership, while those who only occasionally shop at Patel Brothers or have significantly smaller grocery lists would benefit from the free membership. The membership appeals to customers who wish to take advantage of savings, but also normalized the change to hyper personalization by making the algorithm a service that customers can sign up for.

## 8. Embed AI chatbots to create a positive and reliable customer service experience

Customer Service is crucial to addressing consumer concerns regarding the ethical considerations and privacy of data collection processes used by Patel Brothers. However, customer service can only help a specific number of individuals, and customers dislike waiting in call queues. Hence, we propose to add AI-driven chatbots to the mobile app and website to assist customer service in answering any concerns, especially ethical and privacy concerns.

The AI chatbots will primarily be used by customers to answer any simple questions or complaints, and to reach out to the Patel Brothers customer service. For example, if a customer wanted to know Patel Brothers’ policies for data collections, the AI chatbot would let them know automatically, without having to contact a customer service representative. The AI chatbot would also have pre-built questions which customers can click on to receive fast answers. However, if an AI chatbot is unable to answer a question or resolve a complaint, it would automatically contact a customer service representative, usually by providing a phone number to customer service, if they are open. If not, the AI chatbot provides a form in which the customer fills out, to be contacted by a customer service individual. The advantage to this is that an AI chatbot is not limited by human capabilities; it can operate 24 hours a

day, and 7 days a week. With an AI chatbot, customer services and focus on major customer grievances, while also providing a positive and reliable customer service via AI chatbots.

### Timeline:

Our strategic plan to implement hyper-personalization into Patel Brothers would be developed over the span of a year. Many of the strategies would be developed simultaneously. The table to the right shows the start and end dates for each strategy. The plan would begin development in March 2023 with strategies 1, 2, 4, and 8. The plan would officially be completed in March 2024 when the AI system is completed. This is when the cybersecurity analysts are hired, the app is launched and the memberships are available.

Strategy #	Start Date	End Date
1	Website: March 2023 Social: March 2023	Website: June 2023 Social: No End
2	March 2023	June 2023
3	June 2023 (After website)	July 2023
4	March 2023	March 2024 (Longest strategy)
5	January 2024 (Hiring process)	March 2024 (Launched with AI)
6	September 2023	March 2024 (Launched with AI)
7	February 2024	March 2024 (Launched with AI)
8	March 2023	September 2023

## C. Proposed metrics or key performance indicators to measure plan effectiveness

**Strategy 1:** The success of the social platforms will be determined through the change in followers/subscribers after the changes in the accounts are made. The amount of likes per post can show viewers' opinions of different promotions. Viewers' opinions can also be more clearly shown in the comments of these posts. This can be used for important feedback. Additionally, if an increase in sales is reported for products marketed over social media, or products used in posted recipes, promotions for that product were successful.

**Strategy 2:** After every customer meets with a customer service representative, a feedback form appears for them to answer. At the end of every month, all response data will be recorded and analyzed to determine whether the training produced positive, negative, or no improvements to the quality and effectiveness of customer service. Furthermore, online reviews concerning customer service will also be taken into account to determine effectiveness and quality of customer service.

**Strategy 3:** To measure effectiveness of the SEO, Patel Brothers will use an SEO assessment tool, such as Google Search Central. Using this software, Patel Brothers can view and analyze their SEO, and determine whether search engines are prioritizing and ranking the Patel Brothers website over competitors. Patel Brothers will also use Google Analytics, which allows Patel Brothers to view traffic and exposure of the website. Using metrics such as clicks, or the number of users that clicked and entered the Patel Brothers website, Patel Brothers can understand whether their SEO is successful in helping the website increase its traffic and online exposure.

**Strategy 4:** The first metric that needs to be seen is whether the AI system is functional. Patel Brothers can take note of how many customers are reporting glitches or functional errors with the AI. The success of the hyper-personalized AI can be measured by whether customers are actually utilizing the coupons and whether they are responding positively to the recommendations. Patel Brothers can notice how often customers are buying the products that they were recommended and given coupons for, and whether they continue to buy that product later when they don't have a coupon for it. Patel Brothers can also track whether those who were given additional coupons because they were more responsive then used more coupons than they previously did. If effective, the AI will give out an increasing amount of coupons as the customer utilizes them more.

**Strategy 5:** Patel Brothers will keep track of any viruses of malware that enter the system to determine whether cybersecurity additions are efficiently stopping data breaches or any malicious intent. To track the effectiveness of the press release and its marketing, Patel Brothers will track and record every concern brought to customer service that pertains to the ethical and privacy considerations to establish whether the press release resonated with customers, and whether the customers believed the press release and now trust Patel Brothers' data collection and storage

**Strategy 6:** The Patel Brothers IT team will maintain and manage the mobile app, seeing as it falls under their jurisdiction. One of the biggest metrics that Patel Brothers will measure will be the number of downloads of the Patel Brothers app; the more downloads, the more popular and the more successful the app was. Another key metric that will be measured is Date of Birth; Patel Brothers wants to understand if the mobile app has accounts registered to younger generations, signifying the mobile app's success in reaching younger demographics. In addition,



customer reviews on the mobile app will be used to understand areas of improvement, and whether the app appeals to the customers.

**Strategy 7:** The first metric that can be observed is the number of accounts created. Every shopper who regularly shops at Patel Brothers should have an account. Within that number is the number of subscribers to the free and paid memberships. The paid subscribers should mainly be those who purchase the most at Patel Brothers. Over time, those who are more responsive to the personalized coupons should be switching over to the paid membership. For the free membership, a majority of those customers should be using 10 personalized coupons per month. This shows that they are making full use of the restricted benefits of the free membership. Eventually, as their grocery lists potentially grow, they will also switch to the paid membership.

**Strategy 8:** Similarly to the customer service, after every customer uses the AI chatbot, they will be presented with a feedback form. The form's response data will also be collected every month to learn whether the customers are satisfied with the AI chatbot, and if it accurately helped the customer and answered all their questions. Another measurable metric that will be employed is the amount of customers that used the AI chatbot to answer questions, to figure out whether customers are utilizing the AI at all, or directly reaching out to a customer service representative.

## VI. PROPOSED BUDGET

Strategy #	Cost Details	Total
1	2 Web Developers - to redevelop and refine website <u>\$76,800</u>	<u>\$76,800</u>
2	5 Customer Service Trainers - to train and teach customer service <u>\$57,600</u>	<u>\$57,600</u>
3	2 Web Developers - to improve SEO of website <u>\$12,800</u>	<u>\$12,800</u>
4	2 Junior Machine Learning Developers <u>\$384,000</u> Senior Machine Learning Developer <u>\$230,400</u> - To create, develop, and train algorithm  Data Scientist(FTE) - to interpret data and plug into algorithm <u>\$124,700</u>	<u>\$739,100</u>
5	2 Cyber Security Analysts(FTE) - to install cyber security measure <u>\$180,000</u>	<u>\$180,000</u>
6	2 Mobile Applications Developers - to create and develop mobile app <u>\$153,600</u>	<u>\$153,600</u>
7	No costs associated with this strategy	<u>\$0</u>
8	Junior Machine Learning Developers <u>\$96,000</u> Senior Machine Learning Developer <u>\$115,200</u> - To develop AI chatbots and install onto website and mobile app	<u>\$211,200</u>
Additional Allocations	Project Manager - manages all strategies, makes sure on schedule <u>\$192,000</u> Quality Assurance - makes sure everything works <u>\$153,600</u>	<u>\$345,600</u>
Totals	Strategies 1 + 2 + 3 + 4 + 5 + 6 + 7 + 8	<u>\$1,776,700</u>

The proposed budget of our strategic plan consists of the costs of every single strategy. The estimated cost of all our strategies totals to **\$1,776,700**. This budget is expensive; however, most individuals working with us will be on a consultant contract, and Patel Brothers will not be financially liable for them beyond their contracts. Moreover, many of the proposed strategies will generate more revenue than the costs paid to implement them. Using our strategic plan, Patel Brothers can radically improve their revenue and profits, and control a massive share in its respective market.

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## VIII. APPENDIX

### (Appendix A) Google Form Questions:

1. Do you live in Mercer County, NJ?
2. What city/town do you live in?
3. Are you of South Asian origin?
4. Where do you go for your South Asian groceries?
5. How often do you go grocery shopping?
6. Would you value your grocery store having an app?
7. How would you use a grocery store's app/website?
8. Are you part of your grocery store's membership?
9. How does your grocery store communicate information to you?
10. How much do you prefer prepared foods over frozen foods?
11. Do you have a planned/fixed grocery list?
12. How likely are you to try a brand new product while grocery shopping?
13. What would cause you to try a brand new product?
14. How likely are you to switch to a different grocery store to buy food?
15. What factors would cause you to switch to a new grocery store?
16. Do you value a personalized experience in a grocery store?
17. How concerned are you with business entities having data about you?