Portrait
Customer
Analytic
Solutions

Explore, understand and predict customer behavior for optimal ROI

Every connection is a new opportunity™
The Power of Portrait Customer Analytics Solutions

Your Business Challenges

To compete in the new competitive climate, your organization must weed out inefficiencies, improve offer relevancy and increase your speed of insight in support of your critical goals, including:

- Acquire the Right Customers
- Augment Profitability
- Optimize Customer Lifetime Value
- Cross-sell More Effectively
- Improve Customer Retention

That is the power of Portrait Customer Analytics solutions. Any Business Intelligence (BI) tool can tell you that 6% of your customers defected last month. Few can tell you which 6% are the most likely to defect next month. Even fewer can help you understand which customers you can actually save, so you can take the right action today. This is the real promise of customer analytics: giving business users—such as marketers and front line employees—a clear picture of how to segment their customer base and how each segment is likely to behave.

With Portrait your organization can:

Closing the Analytics Gap

Until recently, business managers who wanted access to customer insight were caught between two extremes. They could use standard BI tools with a limited scope for exploring data. Or they could turn to sophisticated number-crunching solutions which require statistical programmers to build complex queries, develop models and produce answers.

These approaches may be sufficient for answering isolated or non-time critical questions but they are not able to engage business users in iterative analysis and exploration. Business managers currently fall into the gap between these two options.

This gap between analysts and the business managers they support such as marketers, product managers, customer service directors and call center managers is preventing organizations from fully capitalizing on their customer data. Those who get the most from their customer data, are those who realize that real insight only happens when accurate, well-executed data models come together with intimate business understanding. It’s about opening up the lines of communication between analysts and business managers and speeding up the iterative investigation process.
The Portrait Customer Analytics Suite

Portrait’s suite of customer analytic solutions is comprised of four modular components which may be deployed either together or individually, with each module solving progressively more complex insight challenges.

**PORTRAIT SELF-SERVICE ANALYTICS:**
*Explore customer data to uncover new areas of opportunity*

Portrait Self-service Analytics is an easy-to-use, browser-based customer data exploration solution which empowers business users across the enterprise to uncover new areas of opportunity within their customer data. Unlike traditional analytic solutions, Portrait SSA does not require advanced resources or IT assistance, but instead accelerates time-to-insight by placing control in the hands of the business stakeholders directly.

**PORTRAIT MINER:**
*Understand, visualize and predict customer behavior*

Portrait Miner is an easy-to-use, predictive analytics solution which empowers customer insight professionals to improve campaign targeting and segmentation by deepening customer understanding and automating the modeling process for predicting customer behavior. The result is rich customer insight, more profitable campaigns and greater customer lifetime value.

**PORTRAIT UPLIFT:**
*Predict how your marketing will change customer behavior*

Portrait Uplift is a predictive analytic solution that empowers your organization to go beyond traditional predictive modeling and focus marketing efforts only on customers whose behavior will be positively changed by your message. Uplift predicts which customers are Persuadables (positively impacted by the offer), while weeding out the Sure Things that will buy anyway, Lost Causes that will never buy (indifferent to the offer), and Sleeping Dogs that will react negatively.

**PORTRAIT OPTIMIZER:**
*Allocate your customers to specific offers and channels for optimal ROI*

A powerful analytic extension to Portrait Dialogue, Portrait Optimizer is a “contact optimization” application that can intelligently match your customers to campaigns and channels, in order to maximize ROI while satisfying your business’ resource constraints.
Portrait Self-service Analytics
Explore Customer Data to Uncover New Areas of Opportunity

Portrait Self-service Analytics is an easy-to-use, browser-based customer data exploration solution which empowers business stakeholders to uncover new areas of opportunity within their customer data. Unlike traditional analytic solutions, Portrait Self-service analytics does not require analysts or IT professionals to process queries, accelerating time-to-insight by placing control directly in the hands of the business stakeholders.

Portrait Self-service Analytics can enable your organization to:

**Increase the speed of decision-making**
Now, non-technical users can access customer information directly, drilling down for instantaneous answers while using “train of thought” analysis.

**Give a wider range of stakeholders access to customer insight**
No longer does customer insight fall solely in the realm of advanced analysts. This solution places free-flow customer data exploration in the hands of business decision-makers, to discern evidence-based customer insight.

**Free up power analysts to focus on highest priority projects**
Today’s customer insight teams are under tremendous pressure to deliver results from complex data. Yet all too often “simple inquiries” from the business can consume a great majority of their time.

Now you can get more out of your analytic team by freeing up your power analysts, allowing them to focus on the projects which will drive the greatest value.

**Improve collaboration between business and analytics teams**
Often what’s missing is a common language between your business stakeholders and your IT savvy customer professionals. Portrait Self-service analytics provides this important “single version of the truth” so everyone can be on the same page.

“**It used to take up to two weeks to turn around data inquiries—now they can get their own answers in less than 2 minutes.**”
—A leading travel services organization

“**We need to get closer to our customers and understand their needs better.**”

“**Our analytics team is spending too much time on basic data queries from the business team—and not enough time on the highest value projects.**”

“**We would like to practice more evidence-based decision-making for our customer segmentation and targeting strategies.**”

If so, then Portrait Self-service Analytics can help.
Portrait Miner
Understand, visualize and predict customer behavior

Portrait Miner is powerful customer data mining and predictive analytic solution that enables customer insight professionals and business users alike to achieve a clear picture of their customers for greater customer understanding, better targeting and prediction of future customer behavior.

The most visual and automated solution of its kind, Portrait Miner bridges the gap between standard BI tools with a limited scope for exploring data, and number-crunching solutions which require statistical programmers to build queries and produce accurate models.

Portrait Miner can enable your organization to:

**Predict future customer behavior for improved targeting**
Predict profit-impacting behaviors and propensities, including customer churn, cross sell and up sell opportunities, campaign planning and segmentation, customer satisfaction and loyalty, and customer lifetime value.

**Deepen your level of customer understanding**
Make customer data come alive with rich, interactive 3D data visualization including heat mapping to drive insight to the forefront. Now you can tap into your customer data, to create a 360 degree view of your customers, across data and systems.

**Increase the productivity of your scarce customer insight resources**
The demands on your customer insight team have never been greater. Using the solution’s predictive automation capabilities, your team can build better predictive models in less time, and empower less specialized resources to produce accurate models.

The solution utilizes powerful 3D data visualization and rapid modeling automation to uncover important data relationships and deliver propensity scores at the push of a button. When it’s time to deploy, your findings can be uploaded immediately, without recoding, through a seamless operational handoff. Whether you are looking to build better models in less time or are just getting started with customer prediction, Portrait Miner can help.

Portrait Miner can empower you to:
- Identify drivers of customer churn
- Learn who are your most profitable customers
- Understand which customers are most likely to buy
- Identify credit risk and fraud triggers

"The modern new user interface will help get new users up to speed even faster and help our power users complete their projects in record time."
—Christian Reder, Marketing Analyst, T-Mobile Austria

DOES THIS SOUND LIKE YOU?
"Our BI tools have helped, but now we want to go to the next level."
"My customer insight team is stretched, and needs to find a way to build more models, more accurately, in less time."
"We want to automate the creation of predictive models—but don’t want to sacrifice model sophistication."

If so, then Portrait Miner can help.
Right now, your business is wasting valuable marketing dollars on customers that will never buy, or will buy even if they don’t receive your marketing communication.

Unlike traditional modeling, Portrait Uplift has the power to predict your organization’s ability to actually change and influence your customers’ behavior. With this information, your organization can focus its marketing upon only those customers that will react positively to a message (Persuadables)—while weeding out those that will buy anyway (Sure Things), will never buy (Lost Causes) or could react negatively (Sleeping Dogs).

By focusing programs only upon the “Persuadables” you can improve the ROI of the same programs that you’re currently running.

Allocate your marketing funds ONLY where it will have a direct and positive impact

Predicts whose behavior can actually be changed by your marketing.

• Improve campaign results by 30-300%
• Decrease marketing program costs by as much as 40%

Build better Uplift models, in a fraction of the time

The only algorithmic approach available that directly models uplift, creating models that are more robust and accurate—in a fraction of the time. Results may be output as lists, scores, models or SAS code.

The Power of Proven

Portrait Uplift is embedded with more than 10 years of Uplift modeling expertise and provides: “4 steps to success” through a guided visual user interface.

This award-winning solution has been the feature of popular analyst reports and marketing industry awards and is the world’s only packaged application for automating the production of accurate uplift models.

Does this sound like you?

“We’re doing response modeling, but are looking for ways to achieve even better results.”

“Is there anything left I can do to cut waste or improve results in my campaigns?”

“We’re trying to build uplift models today, but it consumes tremendous amounts of time and resource, and is difficult to validate.”

If so, then Portrait Uplift can help.
Most marketers are conscious of the fact that their present marketing approach is likely targeting certain individuals with the wrong campaigns and wasting precious marketing dollars as a result. And in this new world of cross-channel communication, channel proliferation and internal business silos, the challenge of properly allocating this channel and mix for maximum ROI can seem an impossible task.

A powerful extension to Portrait Dialogue, Portrait Optimizer is an automated contact optimization solution that can empower your organization to allocate marketing spend where it will have the greatest impact across your campaign, channels and customers, for the greatest ROI and mutual benefit. By weighing your business’ constraints against the expected benefit, your organization can determine the right mix of offers and channels to use to drive customer lifetime value.

Portrait Optimizer can enable your organization to:

**Optimize marketing ROI—across campaigns and customers**

Not all offers are created equal. Portrait optimizer analyzes your business’ constraints, including eligibility, cost, value and quantity for each offer and assesses these factors against the predicted outcome, to automatically allocate the right offers to the right individuals, across the right channels.

**Reduce customer ad-fatigue and opt-out**

In determining the right offer for each individual, Portrait Optimizer can enforce complex customer governance rules, offer eligibility criteria and customer preferences, ensuring compliance, improving relevance and increasing customer satisfaction.

**Automate collaboration across marketers and analysts**

An intuitive extension to Portrait Dialogue, the solution allows marketers to specify optimization constraints and collaborate with analytic teams for optimization tasks. To ensure understanding, heat-mapped visual reports and forecasts provide full transparency before production deployment. Uniquely, Portrait Optimizer is the world’s only contact optimization solution that can incorporate automated uplift models (Portrait Uplift). This powerful, one-of-a-kind capability allows you to maximize the incremental benefit of your marketing spend by not wasting effort on customers whose behavior can’t be influenced by your marketing action.

"Contact optimization is suited for high-volume direct marketing organizations that face the unenviable task of reconciling millions of combinations of customers, offers, and channels with customer analytics, business rules, and contact policies to deliver the optimal message to each customer.”

What Makes Portrait Customer Analytics Solutions Unique

The Portrait Customer Analytics suite is the most advanced yet easy-to-use solution for understanding and predicting customer behavior. The most intuitive, fastest and most effective solutions of their kind, these modular solutions are packed with market leading capabilities which can dramatically improve your bottom line by increasing your insight agility, efficiency and overall marketing effectiveness.

The Portrait Customer Analytics Difference:

**Agility:**
The suite’s easy-to-use interface will allow new users to get up and running quickly while providing seasoned users with visual cues, exceptional interactivity and instantaneous feedback.

**Efficiency:**
With deep analytic and operational automation, Portrait Customer Analytic solutions can empower less advanced analytic resources to generate accurate models and accelerate the delivery of analytic insight throughout your organization.

**Effectiveness:**
With the most advanced modeling best practices embedded in the applications themselves, including Portrait’s unique Uplift modeling solution, your team will be able to produce the most accurate models which can have the greatest impact on your marketing and bottom line.

**THE PORTRAIT CUSTOMER ANALYTICS SUITE IS THE MOST VISUAL, MOST AUTOMATED AND MOST POWERFUL SOLUTION FOR UNDERSTANDING AND PREDICTING CUSTOMER BEHAVIOR.**
From customer acquisition, to customer onboarding, to loyalty, risk and retention, Portrait Customer Analytic Solutions can allow your organization to achieve greater insight for optimizing customer lifetime value. These market leading solutions provide greater customer understanding and may be applied to solve your most pressing insight challenges. Popular examples include:

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<th>FINANCIAL SERVICES</th>
<th>INSURANCE</th>
<th>COMMUNICATIONS</th>
<th>RETAIL</th>
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<th>HEALTHCARE</th>
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<tr>
<td>Acquisition targeting</td>
<td>Customer acquisition</td>
<td>Cost-effective activation</td>
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<tr>
<td>Increase products per customer</td>
<td>Improve renewal rates at reduced cost</td>
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<td>Customer retention and renewal</td>
<td>Increase products per customer</td>
<td>Reduce churn rates and improve saveability</td>
<td>Subscriber profiling</td>
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<td>Credit card repricing</td>
<td>Offer and channel optimization</td>
<td>Plan migration (i.e. to more profitable plans)</td>
<td>Offer and channel Optimization</td>
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<td>Provider efficiency</td>
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<td>Increase utilization</td>
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<td>Tariff optimization</td>
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<td>Patient profiling</td>
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<td>Collections management</td>
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<td>Offer and channel optimization</td>
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<td>Unit performance (patient) prediction &amp; benchmarking</td>
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<tr>
<td>Offer and channel segmentation optimization</td>
<td>Stimulate recharge (prepaid telco)</td>
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<td>Winback</td>
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<td>Exception and suspicious behavior analysis</td>
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Your Business, Made More Profitable

These modular solutions are packed with market leading capabilities which can dramatically improve your bottom line—in many cases using the very same programs you're running today.

The Portrait Suite

Make Every Interaction Count

Portrait customer analytic solutions are part of the Portrait Customer Analytics and Interaction Suite which empowers customer-focused B2C organizations to improve profitability, grow customer value and improve customer retention through higher ROI customer interactions—from insight into action.

By fusing the power of deep customer insight with a connected cross-channel dialogue across your customer touch points, your organization can deliver an engaging customer dialogue and achieve lifetime relationships with each of your most valued customers.

Available modules of the Portrait Customer Analytics and Interaction suite include:

**INSIGHT**
- Portrait Self-service Analytics
- Portrait Miner
- Portrait Uplift
- Portrait Optimizer

**ACTION**
- Portrait Dialogue
- Portrait Interaction Optimizer
- Portrait Foundation
Pitney Bowes Business Insight gives you a competitive advantage

With Pitney Bowes Business Insight, you are able to analyze and understand your customers more accurately and completely. Beyond what and how, we help you know why. Our Customer Analytics capability lives within a set of solutions that Enable Lifetime Customer Relationships and drive better business analysis and decision-making, as well as enhance operational systems and workflows.

With Pitney Bowes Business Insight, you can:

• Understand, visualize and predict customer behavior
• Predict how your marketing can change customer behavior
• Allocate your customers to specific offers and channels for optimal ROI

In short, with Pitney Bowes Business Insight, you will be better able to acquire, serve and grow your customer and constituent relationships.