Portrait Explorer™

Discover new customer opportunities through rapid visual insight

Pitney Bowes
Software

More than BI

Effective-decision making for marketing requires more than just BI tools that deliver static reporting, ad hoc querying and dashboards. The real business challenge is not getting a quick answer to a known question, but rather to support the process of discovering what the right question is from a business perspective.

Optimised for Customer Insight

Portrait Explorer™ specifically addresses the business need for identifying actionable target customer segments; delivering immediately intuitive results for the ad hoc customer query process. For this business purpose Portrait Explorer™ is simpler to use, more flexible, and delivers much faster "time to action" than a horizontal business intelligence (BI) tool.

Works the way you do

Portrait Explorer lets you visually explore your customer data in a unique and user friendly way. You can easily zoom out to see the big picture with accurate counts and aggregates across your full customer base, reorganise and select relevant customers through simple drag & drop, and then zoom in to check on individual examples to validate your targeting choices and suggest additional refinements.

This powerful ability to "manage by anecdote" matches the way business users think, rather than the "SQL mindset" required by many tools.

SEE IT IN ACTION

Portrait Explorer™ makes understanding your customers as easy as using your digital photo album.

Executive summary

Today's customer-centric organisations are being challenged to dramatically improve their customer targeting and understanding of customer behaviour to make faster, more profitable marketing decisions. Enabling marketers themselves to quickly and easily identify the best customers for both inbound and outbound marketing campaigns can make all the difference.

Business challenge

Combing through your customer data can be difficult and time consuming. Often, marketing and product teams must rely on IT and customer insight departments that are already strained with a backlog of projects, making even simple queries difficult to turn around quickly. In addition, even the best marketers often find that it can be difficult to know the "right question to ask" on the first attempt—meaning your request might take several iterations before the right data parameters can be determined. As a result, discerning true insight can take days, to weeks, dramatically slowing your time to market, draining your organisational productivity and directly impacting campaign profitability.

Solution

Portrait Explorer makes navigating and understanding your customer data as easy as using your digital photo album. With its completely intuitive approach, non-technical users are able to slice and dice customer data on the fly, quickly identifying target customer segments and sharing results across teams. Innovative "customer cards" provide highly visual "portraits" of each your customers—including channel usage, products owned, contact history, lifetime value metrics and more—and can be configured for your team's specific needs. Now, immediately actionable customer insight is always at your decision-makers fingertips.

> *"The power of this for the marketer is that it gives them a window... to understand their customers better... and its power is in generating ideas."*
>
> **Laithwaites Wines**

Empowering marketers

Data access and technology challenges often leave marketers cut off from the quantitative customer insight they need to deliver timely, effective campaigns to market. Portrait Explorer removes those barriers and enables marketers to quickly reach the right customers, with the right message.

Self-service access to customer insight will transform the way you manage your business by reducing the barriers to data-driven decision making.

Self-Service Customer Analytics

In a world of ever-increasing velocity of business, there is growing pressure to make more accurate targeting decisions more quickly. Self-service tools short-circuit the traditionally torturous back and forth between business users, IT and statistical, or marketing sciences teams. According to a leading analyst firm, today "analytics are often over-centralised [and] users become psychologically dependent on power users and specialists to meet their analytic needs." They call for increasing deployment of self-service tools, tailored to business users rather than statistical specialists, in order for "...ordinary users [to] generate more analysis more quickly than the small number of specialists and power users can today."

Portrait Explorer Delivers

For the past decade, Pitney Bowes Software has worked closely with some of the world's largest consumer organisations to enable them to gain a competitive advantage from customer analytics. These insights led us to identify four cornerstones of success:

- **Greater analytic bandwidth:** Free up skilled analyst resources to focus on higher-value tasks as business and marketing users are empowered to make informed decisions, often more effectively.

- **Unrestricted power:** Support interactive "train-of-thought" analysis, with no limits on data volume, detail or flexibilty.

- **Immediately intuitive:** A built-for-purpose browser-based solution allows users to get on with the business at hand without obstacles due to training, technology, or moving data between tools.

- **Actionability:** Allow users to get the results they want where they need them, including integration with Microsoft® Excel, and publishing of targeting rules directly to interaction management tools.

Portrait Explorer makes it easy to ask any question of customer information at any level; removing time limitations associated with generating quick insights to business trends and patterns, and boosting the efficiency of insight-driven decision-making. Portrait Explorer is fully integrated with the Portrait Customer Analytics suite, allowing power users to publish and administer customer datasets and predictive models for broad use across the organisation.

"What used to take two weeks to turn around can now be done in two minutes."

AAA South

Extend your 360° view

Individual customer attributes are directly actionable, including live links to extended customer data like your internal CRM or external systems such as Facebook.

Portrait Explorer lets you visually explore your customer data, using a groundbreaking approach that feels just like managing your online photo album
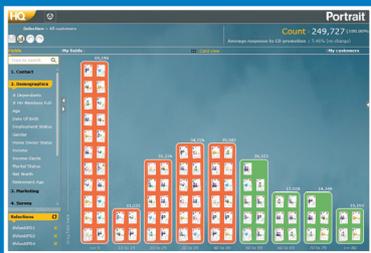
A heat map is used to show the quality of the segment of target customers identified

Customer cards let you zoom to individual customers to validate and refine your targeting without complex tools like SQL

Customers at your fingertips

Portrait Explorer lets you visually explore your customer data, using a groundbreaking approach that feels just like managing your online photo album. Real customers from your database are displayed as "customer cards" that provide an immediately accessible dashboard of each individual, displaying key customer metrics in the style of collectible trading cards.

Customer cards leverage your existing data and metadata to paint a rich and immediately intuitive portrait of your customers, configured based on your specific business requirements to maximise relevance.

Uncompromised performance

Portrait Explorer is built on our high-performance analytics engine to scale effortlessly to tens or hundreds of millions of customers, with thousands of attributes for each. Unlike BI tools, there is no pre-aggregation: you can work interactively with the detailed customer data giving you full control to make whatever selections or segmentations while seeing results in seconds, even when deployed to hundreds of users.

Targeting by design

Portrait Explorer enables a true "train of thought" process for customer selection. The solution is built to simplify the process of defining exactly the right customers, whether as the audience for an inbound or outbound marketing interaction, to identify under-served or misunderstood segments, or simply to deliver precisely targeted business insight.

Because most initial selection criteria are poorly defined, the quintessential design process requires iterative exploration and refinement, allowing the user to backtrack and investigate alternative decisions, before finally identifying the correct result.

Powerful, flexible & lightning fast ...perfect for segmentation and illustrational purposes.

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