



MARKETING SUCCESS STARTS WITH U™



## Unica® Optimize

### Optimize Results While Balancing Marketing Goals, Contact Preferences and Business Constraints

As the complexity of marketing increases – more customer touch points, finer audience segmentation, more product lines, or business units – the number of occasions and motivations for marketers to contact their customers grows dramatically. How can marketers ensure customers receive the most relevant and profitable offers while satisfying the needs of individual business areas and minimizing customer contact fatigue?

The answer is Unica Optimize, a companion product to Unica Campaign, which offers a rich set of contact optimization capabilities:

- **Sophisticated contact optimization algorithm:** mathematically determines the best communications for each customer based on the customer's interaction history, offer details, channel preferences, time frame, business constraints and rules, and marketing objectives
- **Configurable capacity constraints:** limits that impact contact strategy, such as size of the marketing budget limits, the allowable number of contacts per customer per period, how many offers of each type are available, number of telemarketing calls that can be made per period, or direct mail pieces that can be sent, etc
- **Customer preferences:** recorded preferences for each customer, such as preferred channel to receive communications, maximum number of contacts each customer wishes to receive each month, and primary product or service interests
- **Business rules:** determine based on business considerations, such as limits on what offers can be combined, allowable sequences and timing of offers ("if A, then not B within 30 days"), minimum credit scores for certain offers, exclusions of specific customers, offer-specific opt-outs, etc
- **Business goals:** what gets maximized as part of the optimization process; virtually any marketing goal can be specified, such as maximizing customer value, revenue, profit, or probability of response

- **Flexible scoring options:** can use simple ratings and ranks, not just scores from predictive models, to execute the optimization process, making it usable by marketing organizations that have not yet adopted predictive analytics
- **Reports and analysis:** automated pre- and post-optimization reporting to allow scenario and sensitivity analyses to fine-tune parameters

With Unica Optimize, marketers can determine the optimal contact strategy over time for each customer or prospect.

#### INCORPORATE ORGANIZATIONAL RULES AND OPERATIONAL CONSTRAINTS

Each organization has unique business rules—limits on the number of customer communications made in a given time period, inventory per offer—that must be enforced across all marketing programs. Often these limits are driven by industry best practices, legal requirements or channel capacity limitations. Using Optimize, you can define standard business rules and constraints to ensure that legal rules, business requirements and operational restrictions are enforced across all of your campaigns. Customer preferences such product interests and preferred channel may be configured and updated at any point in time. For example, a rule may be, "A customer should receive a maximum of X communications via his or her preferred channel each month." Custom capacity constraints, such as the maximum number of calls the sales team can make or the total communication budget, can be defined as well. By delivering messages and offers that take into account each individual's interests and preferences, you build customer loyalty and increase response likelihood.

#### POWERFUL ANALYTICS FOR BETTER DECISIONS

Optimize utilizes a patent-pending optimization algorithm that takes into account customer, offer, channel, date and promotion history, as well as business rules and constraints, to mathematically determine the best set of communications for

