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A ROADMAP FOR **GROWTH**



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Unlock the value of optimization for customer management





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Introducing:

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Experian
- **Andrew Scott**
Experian
- **Lynn Brunner**
Experian



Key take-aways



- See how easy it is to leverage insight and improve decisioning, in a user-friendly environment
- Learn how to expand the usage of optimization into real-time, with a focus on digital
- Learn more about implementation and integration options, to get quick wins

What is optimization?

A mathematical process that maximizes or minimizes a defined business objective subject to any real-world constraints and requirements that need to be satisfied.



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What is Marketswitch Optimization®?

- Marketswitch Optimization® wraps sophisticated mathematics within an easy-to-use software package
- Enables users to perform true “what-if” scenario analysis without any specialized mathematic or programming background
- Provides a structure for business users to define their own goals, constraints, and other business metrics
- Uses data and models currently used for decisioning
- Achieves the mathematically best set of decisions for a given problem





What is Marketswitch Optimization[®]?



Maximize your business goals
(such as profit, volumes, ROI)



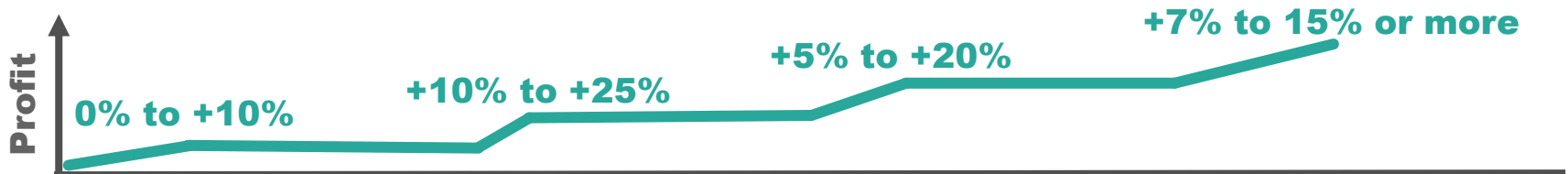
By determining the best decision for each customer or segment
(such as which action, decision, offer to make)



While satisfying the constraints of your business
(Such as eligibility, budget, exposure, channel capacity)



Based on the forecasts of your underlying data and predictive models.
(such as response models, take-up rate models, loss models)





Simplified optimization example

Consider three customers each of whom can be allocated one of three decisions

Objective: Maximize probable return

Constraints: Each decision can only be selected once (e.g., volume limit)

Offer	Return		
	Decision A	Decision B	Decision C
Customer 101	\$25	\$4	→ \$24
Customer 102	→ \$22.50	\$7	\$12
Customer 103	\$12.50	\$8	→ \$20

Red = Rank and sort

Example: **\$45.00**

Blue = Optimization

Example: → \$54.50

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**Let's review
the optimization
scenarios**





Mobile initial line assignment optimization project

Deploy an optimized decision tree and real-time strategy into PowerCurve®

- Selection of most profitable decision at point of application
 - ▶ Control channel-specific risk and target volumes
 - ▶ Flexibility to make changes as business needs change – change objective function, constraints or rules
 - ▶ Ability to test and execute quickly and efficiently in either a decision tree or real-time structure





Cable retention optimization project

Deploy into ongoing customer management and retention

- Weekly campaign to reduce attrition and build additional customer value
 - ▶ Achieve maximum efficiency in marketing retention activities, enterprise wide or product line
 - ▶ Determine which retention offers will produce the most retained revenue while accounting for retention cost
 - ▶ Factor elements such as “contact frequency” rather than just “revenue” to select accounts
 - ▶ Leverage historically or model developed inputs such as a churn model



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Telco upsell marketing optimization project

Business requirements

Deploy into weekly ongoing customer management/contact process

- Weekly selection and creation of mobile text messaging and outbound call center prompts
 - ▶ Select across multiple service offerings that maximize NPV
 - ▶ Adhere to marketing budget constraints
 - ▶ Hit acquisition targets for different product lines
 - ▶ Stay within volume capacity limits for call center





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Let's run the scenarios!





Questions?





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1 Select the Survey button and complete

2 Select the breakout session you attended

Vision Conference
Breakout Session Survey

Experian

1. How would you rate the presenters' knowledge?
 Excellent Above average Average Below average Poor

2. How would you rate the presenters' delivery?
 Excellent Above average Average Below average Poor

3. How would you rate the presenters' time management?
 Excellent Above average Average Below average Poor

4. How useful was the session information?
 Very useful Somewhat useful Neutral
 Somewhat not useful Not useful

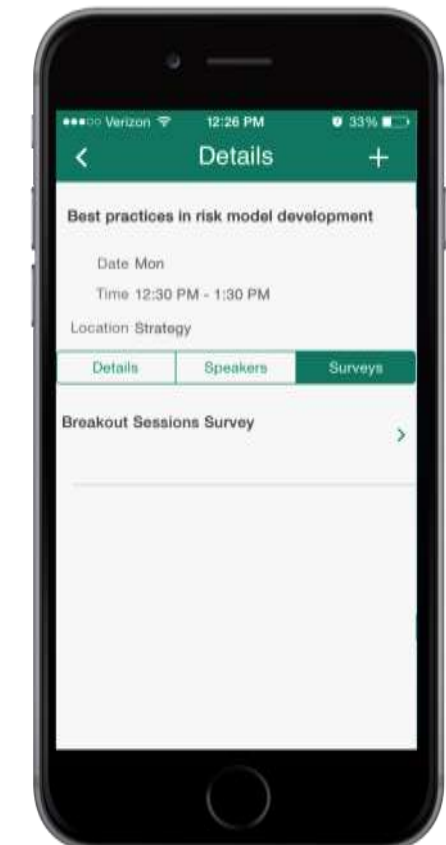
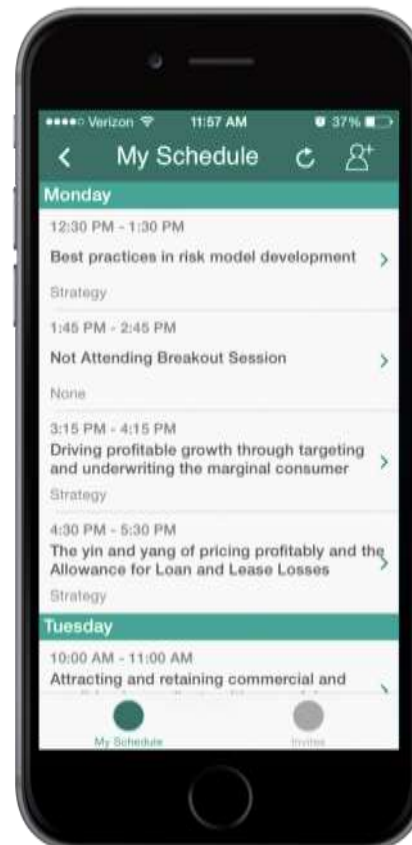
5. How would you rate the session on being current?
 Very current Somewhat current Neutral
 Somewhat not current Not current

6. How relevant was the session content to the title and description?
 Very relevant Somewhat relevant Neutral
 Somewhat not relevant Not relevant

7. How would you rate the level of content?
 Too advanced Just right Too basic

8. Why did you attend this session? (Check all that apply.)
 Relates to my business The presenter(s) Interest in new product
 Compelling session description Increase product knowledge

9. Do you have any additional comments?





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